

SmartIT – Create New Menu Overview

Console View

Universal/web-based client only

Using Smart IT, you can also create tickets from the Create New menu, as illustrated in the following scenario for creating an incident request. The Create New menu uses a more traditional, form based way to create tickets.

Using the Create New menu, you can create the following tickets and events:

- Incident
- Work order
- Change request
- Broadcast

The procedure below covers creating an incident, but the steps involved are nearly the same for other types of events.

- 1. Open SmartIT.
- 2. Click Create New, then select Incident.



3. In the Affected Customer(s) field, enter the beginning of the customer's name, Employee ID, or email address, then select the customer from the list of all possible matches that pops up. The Affected Company field will auto-populate based on your selection.

4. (optional) Click Add person to add additional customers.

5. (optional) In the **Select Incident Template field**, you can enter a common issue to see if there is a template for that issue. Select the desired template from the list that appears. If no list appears, no relevant template was found.

- You can also click **Browse All Templates** to open a pane where you can browse by template category or search.
- If you are using a template, some or all of the fields will be populated.
- If there is no relevant template, some of the fields will show the default value.
- 6. Enter the **Incident Title** field.



- 7. Enter an Incident Description.
- 8. Set Impact and Urgency if needed.
- 9. Select an Incident Status.

10. Enter the beginning of the name of the **Affected Business Service**, then select the appropriate match.

11. To select the Operational Category, you can either search (based on text you enter) or browse.

 a. Search: Enter part of the name of the desired Operational Category. You'll be shown a list of categories that match what you have typed, with all tiers chained together. For example, Request > Hardware > Move. Select the appropriate match.

Affected Business Services	Use a different company from Cornell University to select categorie	
Collaboration Tools X	Operational Category	
Affected Asset	hardw	
Start typing the name of an asset	Request > Hardw are > Add	
	Request > Hardware > Configure	
	Request > Hardware > Move	
	Request > Hardware > New	
	Request > Hardware > Purchase	
	Request > Hardware > Remove	
	Request > Hardware > Repair	
	Restart > Hardware	
	Browse Categories	

b. **Browse:** Click Browse Categories. You'll see three empty boxes, representing the three tiers of categorization. Click in the uppermost box to select the appropriate choice. Click in the second and third boxes to select the other tiers.

Affected Business Services	Use a different company from Cornell University to select categori
Collaboration Tools ×	Operational Category
Affected Asset	Request
Start typing the name of an asset	Hardware
	Add
	Configure
	Move
	New
	Purchase
an distance de la contrata de la co	Domeyo

12. Select the appropriate **Product Category**. As with Operational Categories, you can either search or browse.

13. Under Assignee, click Change assignment.

	Tasks are ordered within each section by sequence (first to last)	
Tasks (0)		Related Items (0)
None Yet	None Yet	
Assigned to	Support Group	Ed

14. From the **Group** dropdown list, select the appropriate group. A list of possible assignees will appear below.

	Update Assignment	
Create New -	Assignee	Additional Info
	Auto-assign to the best fit group	
	Company.	Group:
dated a few seconds ago	Cornell University	Communication and Documentation
	Search:	
	Q Search for a specific person by nam	10
ice 2	-	
ed States	Assign to Support Group (Com	munication and Documentation)
2 b	The ticket can be assigned to a	a specific agent later.
WC	Dolores Landingham	Communication and Documen.,,
	CIO - CIT Support	
	Phil Q Schmertz	Communication and Documen
Operati	CIO - CIT Support	

- 15. Select the first entry (Assign to Support Group) or select an individual.
- 16. Click Assign at the bottom of the pane.
- 17. Back on the main page, at the bottom, click Save Ticket.