SmartIT – Smart Recorder Overview

Smart Recorder uses a free-form text entry field to help you focus on what the customer is saying, instead of filling out fields in a structured form. This way of creating a ticket helps you to capture information in real time, directly from the customer and in their own words. Smart Recorder helps you to create tickets of all kinds more quickly and with greater accuracy.

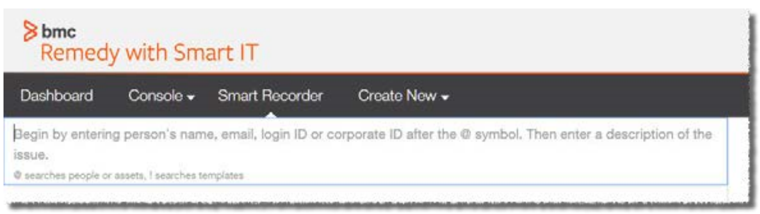
SEARCH SYMBOLS

» To help Smart Recorder recognize keywords on which it will run searches, type a special character in front of the keyword.

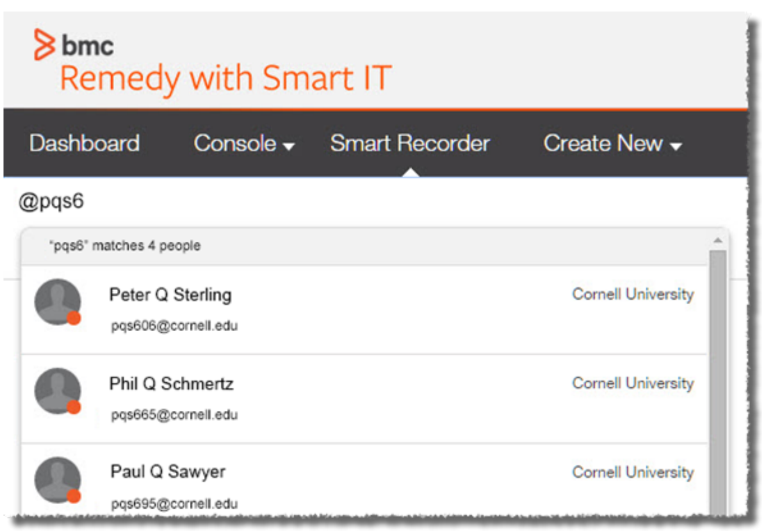
Symbol	What follows is…
@	A person or asset
!	A template

1. Click Smart Recorder in the Remedy toolbar.

When you open the Smart Recorder first time, the guidance text ("Begin by entering @person's name, email, login ID or corporate ID and a description of the issue.") prompts you on how to begin.



2. Beginning with the @ symbol and a letter, 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.



When the customer is matched, the customer preview area populates with the customer's contact information. Under the customer's information, you can also see the existing open tickets that involve current customer or asset.

(Optional) Identify additional people by using the @ symbol again. Using the menu next to each person's name, identify one (and only one) person as the customer, and all others as contacts or persons mentioned in the issue.

3. Start describing the issue by entering an issue type, term, or phrase. The system will search for suggested resources. Use the keyword search symbols to identify assets and templates.

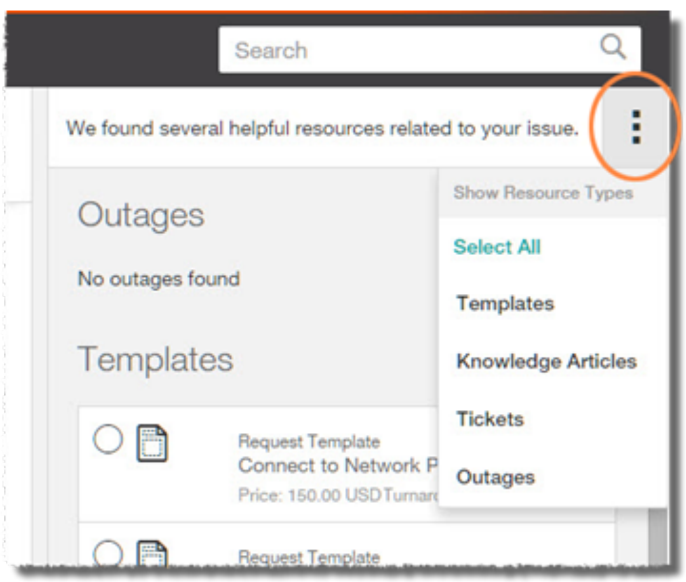
If you know the service, you can add that in the toolbar as well by typing @servicename. The system will search for related services, cross-referenced with previously referenced people, locations, issues, or assets. The same rules apply for assets with @assetname.

- On the universal client and iPads, suggested resources appear on the right side of the screen.
- On Android tablets, tap the expand icon to show suggested resources.
- On phones, tap one of the icons to view templates or similar tickets,

Recommended Knowledge Articles, and outages can also be seen under the template list.

(Universal client and Android devices) If you click Full Details to open the previewed resource in full screen mode, the unsaved ticket will be lost.

(Optional, universal client) Filter the suggested resources by clicking the menu (three dots symbol).



4. If there is an applicable template, continue to the Templates section. If there is not an applicable template, continue to the No Relevant Template section.

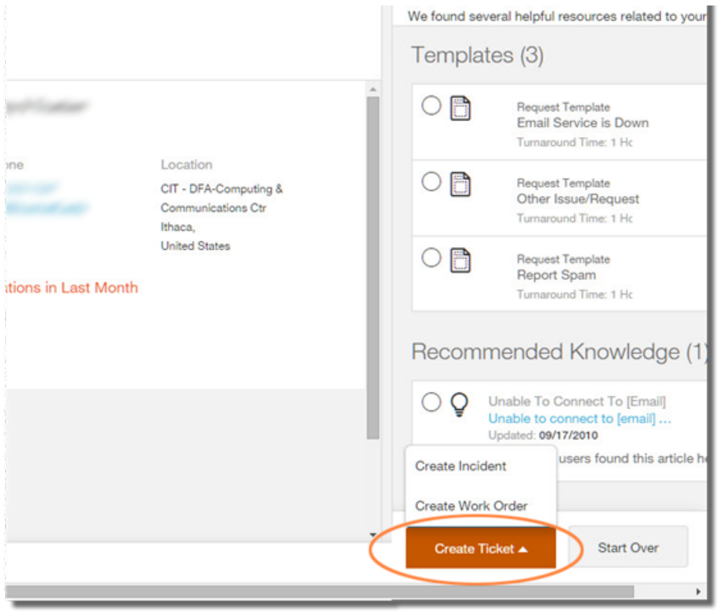
Templates

When creating a ticket, whenever possible, use a Template. This ensures that the necessary information is collected. Only one template can be applied at a time.

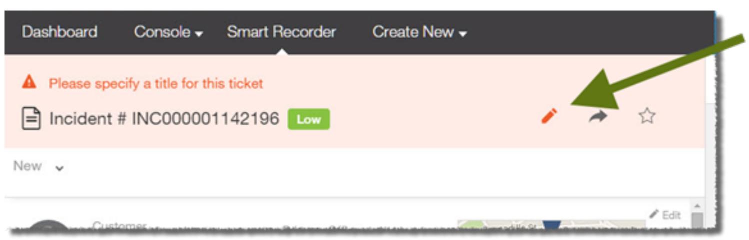
After selecting the appropriate template from the suggested resources, fill in the required fields, then click Confirm + Save.

No Relevant Template

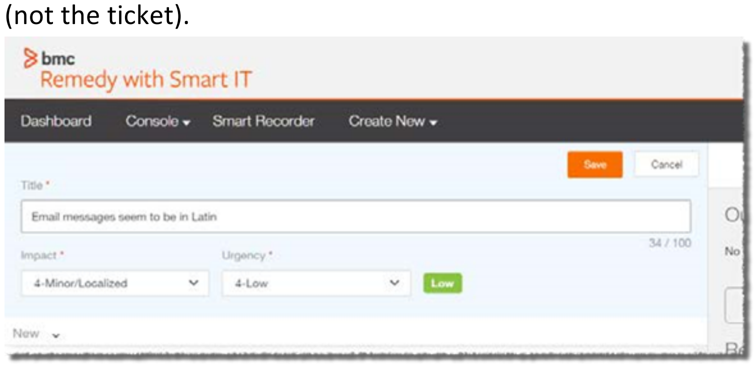
If there is no applicable template, click Create Ticket, then select Create Incident or Create Work Order.



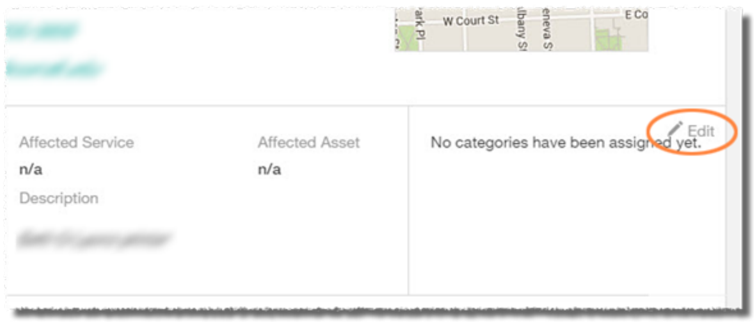
a. To edit the **Title** of the incident, click the pencil icon in the Title section, then enter the title.



b. Set **Impact** and **Urgency** if needed. Click Save at the top of the window to save the title (not the ticket).



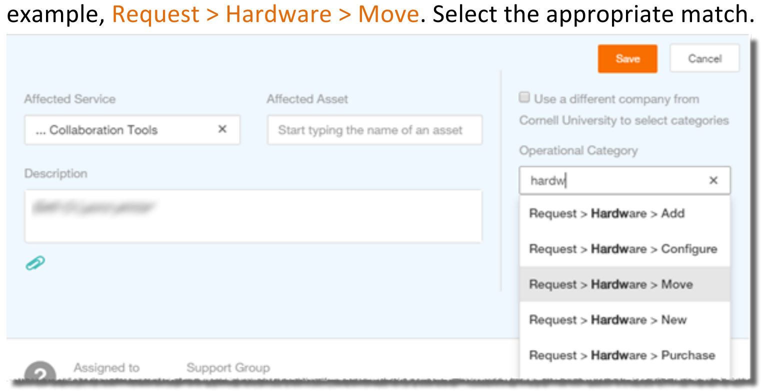
c. In the section that currently says **No categories have been assigned yet**, click the pencil icon.



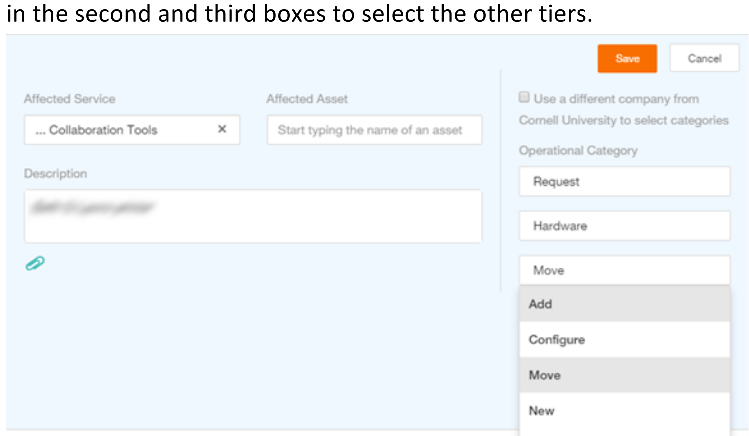
d. Enter the beginning of the name of the **Affected Service**, then select the appropriate match.

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

   i. **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.



   ii. **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.

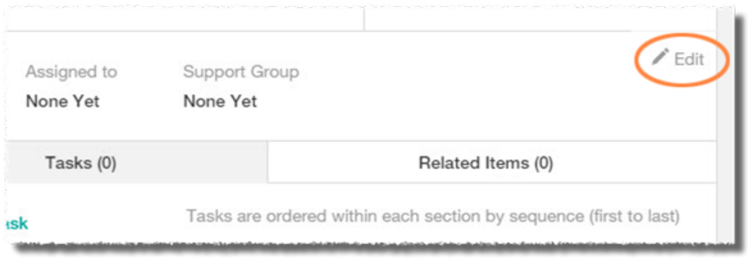


f. Select the appropriate **Product Category**. As with Operational Categories, you can either search or browse.

g. Enter a **Description** of the incident.

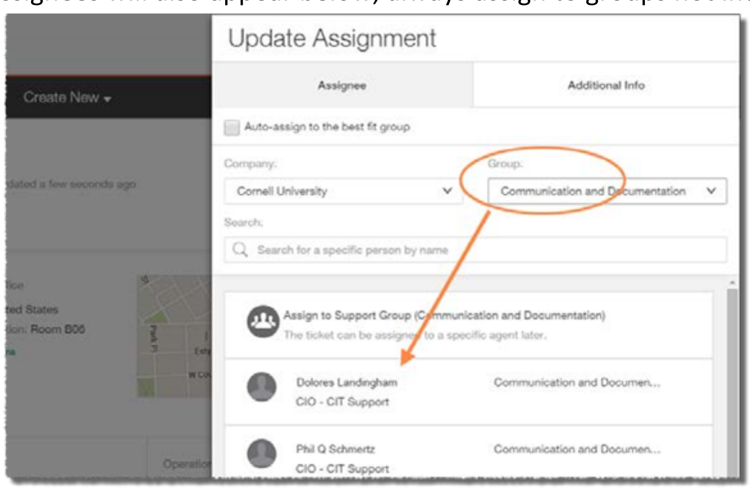
h. Click Save in the block of fields you've been editing (not "Confirm + Save" at the bottom of the page).

i. In the section with **Assigned** to and **Support Group**, click the pencil icon. An Update Assignment pane will slide open.



j. From the **Company** dropdown list chose the correct support company; from the **Group** dropdown list, select the appropriate group.

k. Next click on **Support Organization** and select the appropriate group (a list of possible assignees will also appear below, always assign to groups not individuals).



l. Select the first entry **Assign to Support Group**.

m. Click Save.