SmartIT – Create New Menu Overview

Console View

Universal/web-based client only

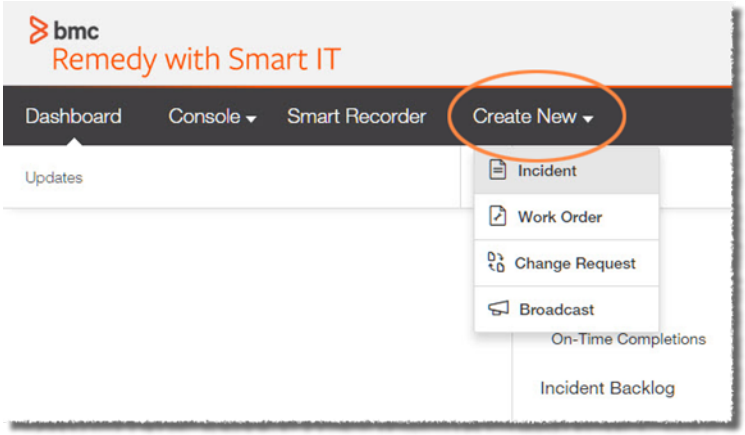
Using Smart IT, you can also create tickets from the Create New menu, as illustrated in the following scenario for creating an incident request. The Create New menu uses a more traditional, form based way to create tickets.

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.

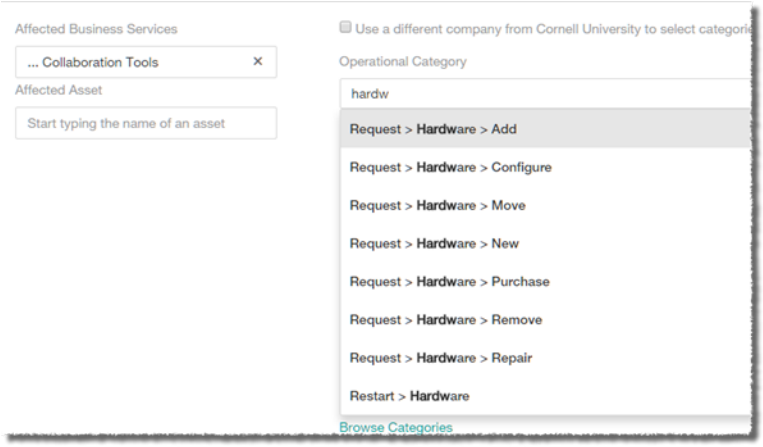
1. Open SmartIT.
2. Click Create New, then select Incident.



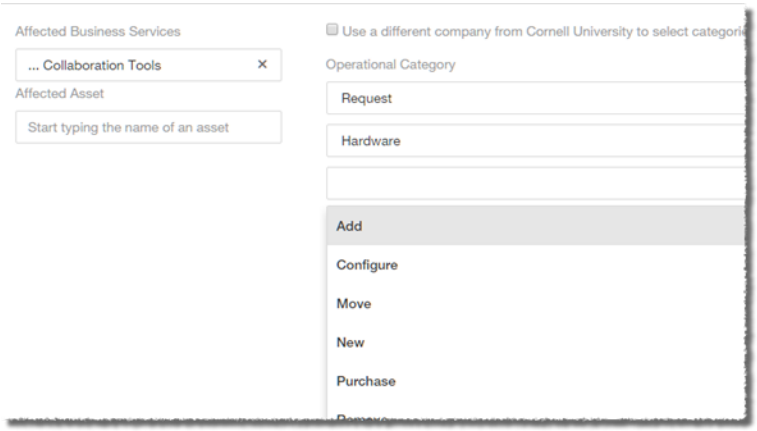
3. In the **Affected Customer(s)** field, enter the beginning of the customer's name, Employee ID, or email address, then select the customer from the list of all possible matches that pops up. **The Affected Company** field will auto-populate based on your selection.
4. (optional) Click Add person to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

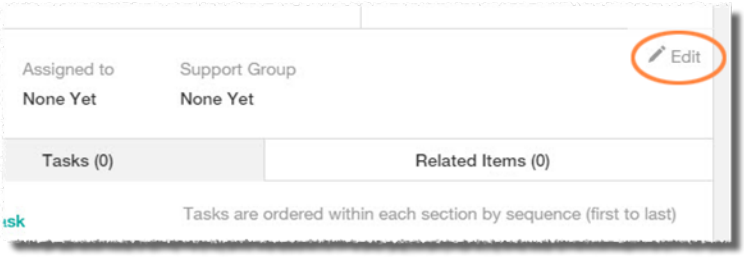
a. **Search:** Enter part of the name of the desired Operational Category. You'll be shown a list of categories that match what you have typed, with all tiers chained together. For example, Request > Hardware > Move. Select the appropriate match.



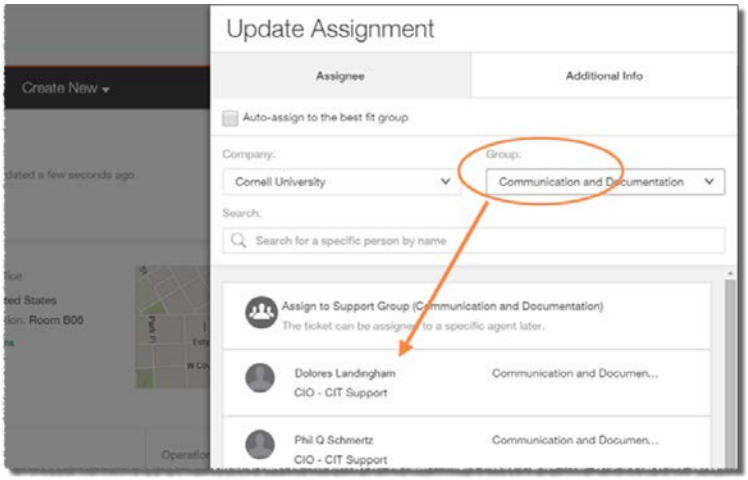
b. **Browse:** Click Browse Categories. You'll see three empty boxes, representing the three tiers of categorization. Click in the uppermost box to select the appropriate choice. Click in the second and third boxes to select the other tiers.



12. Select the appropriate **Product Category**. As with Operational Categories, you can either search or browse.
13. Under Assignee, click Change assignment.



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



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.