

NEWCASTLE UNIVERSITY IT SERVICE NU SERVICE ANALYST HOW-TO GUIDE: HANDLING INCIDENT RECORDS

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DOCUMENT CONTROL

Document name:	Analyst Guide – How to handle an Incident Record
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VERSION HISTORY

Version	Date	Author	Change
0.1	06/01/2022	Aidan Fay	Created

1. Overview

Once a Service Request has been logged it will appear in the **INCIDENT** list:

HOME INCIDENT: 1002047 ✕ INCIDENT: 1002048 ✕ **INCIDENT** ✕

All (1-100 of 406 search records) Show Filters

NEW MULTISORT

Ticket ID	Summary	Current Status	Priority	Custo...	Customer ID	Assigned Team	Service	Subcategory	Category	Created
1002048	Receiving bluescreen when switching on machine	Active	5	Aidan ...	naf99	Service Desk	Accessibility A...	Accessibility Advice	Accessibility...	14/07/2021 ...
1002047	New ticket	Active	5	Aidan ...	naf99	SMO	AV	Video Conferenci...	Video Confe...	14/07/2021 ...
1002017	MI test 1	Active	3	Steph...	nsw81	Service Desk	Aspire	Aspire	Aspire	13/07/2021 ...
1002011	MI test 4	Active	3	Lucy B...	nijc	Service Desk	Accessibility A...	Accessibility Advice	Accessibility...	13/07/2021 ...
1002010	MI test 3	Active	3	Lucy B...	nijc	Service Desk	AV	AV Support for E...	AV Support ...	13/07/2021 ...

Double clicking on the Incident opens the ticket:

← BACK TO ALL IN SAVE ADD NOTE NOTIFICATION ASSIGN TO ME INCIDENT TEMPLATE LINK THIS TICKET TO AN MI

WITH CUSTOMER WITH 3RD PARTY RESOLVE CANCEL

days 19 hours left for first escalation

CUSTOMER AND STATUS

Raise User Information <p> Raise User: Aidan Fay (Aidan Fay) Logon ID: naf99 Email: Aidan.Fay@newcastle.ac.uk Alternative Email: Telephone: 0191 455 2222 Alternative Telephone: Location: Europe Room/Alt Location: Faculty/Service: School/Department: </p>	Logged on behalf of Information <p> Logged on behalf of: John Harvey (JD Harvey) Logon ID: njh199 Email: john.harvey@newcastle.ac.uk Alternative Email: Telephone: 123 Alternative Telephone: Location: Room/Alt Location: Faculty/Service: School/Department: </p>	Ticket Information <p> Status: Active Owner Team: Service Desk Owner: Source: Phone </p>
---	---	--

☒ Include Reported By Email
 ☐ Declare as Parent Incident

DETAILS TICKET HISTORY TASK (0) ATTACHMENT (0) MAJOR INCIDENT PROBLEM CHANGE (0) CAUSED BY CHANGE (0)

Summary
 Receiving bluescreen when switching on machine
Description
 None

Category Search
 Service: Accessibility Advice
 Category: Accessibility Advice

2. Re-assigning an Incident

To reassign an Incident, change the Assigned team to the required resolver team:

Ticket Information**Status:**

* Active ▼

Assigned team:

* Service Desk ▼

Click **SAVE** and you will be prompted for a re-assignment reason, enter the details and click **OK** and the ticket is re-assigned:

Enter...

Enter team re-assignment reason *

Can you please reset password. Thanks

OK

Cancel

[Taking ownership of an Incident /Assign to Me](#)

From the top left menu select the **ASSIGN TO ME** option:

[← BACK TO ALL SR](#) **SAVE**[ADD NOTE](#)[SEND EMAIL](#) **ASSIGN TO ME**

The Assigned Team then changes to your group/you as the Assigned analyst:

Ticket Information

Status:	*	Active	▼
Assigned team:	*	SMO	▼
Assigned analyst:	*	Aidan Fay (Aidan Fay)	▼

3. Assigning an Incident “With Customer”

To put the Incident with customer, From the top right menu, select the **WITH CUSTOMER** option:



You will then be prompted for a “**Waiting for Customer reason**”, enter the details and click OK:

Enter...

Waiting for Customer
reason: *

Please can you confirm a time when we can visit you and take a look at your machine.

Regards

IT Service Desk

OK

Cancel

You can then see that the ticket Status changes to “**Waiting for Customer**”:

Ticket Information**Status:**

*

Waiting for Customer ▾

Owner Team:

*

SMO ▾

Owner:

*

Aidan Fay (Aidan Fay) ▾

The top right menu now contains a new option of “BACK FROM CUSTOMER”:

   **BACK FROM CUSTOMER**  **CANCEL** **MORE ▾**

The ticket can either be returned from customer through Self Service by the customer or by NUIT staff by clicking on **BACK FROM CUSTOMER**, entering the “**Back From Customer reason**” and clicking **OK**:

Enter...Enter Back From
Customer reason: *Customer called to advise that they are available on
Wednesday at 3pm.**OK**

Cancel

You can now see that the ticket Status is now set back to Active:

Ticket Information**Status:**

*

Active ▾

To put the request with **THIRD PARTY**, From the top right menu, select the **WITH 3RD PARTY** option:



You will then be prompted for a “**With 3rd Party reason**”, enter the details and click OK:

Enter...

With 3rd Party reason: Awaiting guidance from DELL

*

OK

Cancel

You can then see that the ticket Status changes to “**Waiting for 3rd Party**”:

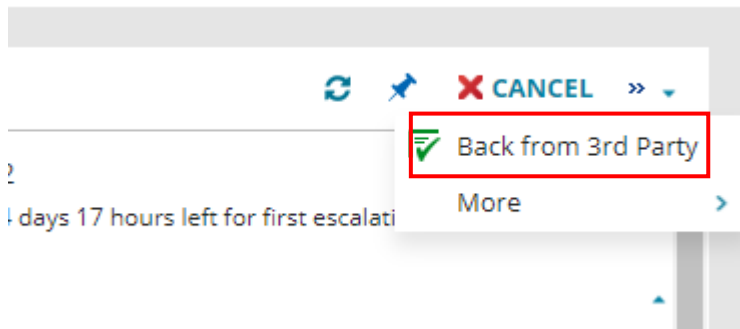
Ticket Information

Status: * Waiting for 3rd Party ▼

Owner Team: * SMO ▼

Owner: * Aidan Fay (Aidan Fay) ▼

At the top right, you now have a down arrow that lets you select “**Back from 3rd Party**”:



Enter the **Back from 3rd Party** reason and click **OK**:

Enter...

Back from 3rd Party
reason: *

DELL have advised that they have no other reports of this issue.

OK

Cancel

You can now see that the ticket Status is now set back to Active:

Ticket Information

Status: * Active

4. Adding a Note to or Sending a notification from an Incident

Adding a note

From the top left menu select the **ADD NOTE** option:



Enter the note details and click **Save** (Unticking “Publish to Self Service” makes the note Private):

New Notes >

Notes

Category

Memo

Source

Phone

Duration (Min)

Publish to Self Service

☒

Summary

Customer call with an update

Notes

Customer will now be available from 2pm on Wednesday.

Created by:

naf99

On:

14/07/2021 14:33

Modified by:

naf99

On:

14/07/2021 14:33

Save

Cancel

Enter...

Select Cause Code *

Other

Resolution Details *

Rebuilt machine

Technical Resolution Details *

Rebuilt machine using build/image 1.2.3.4.4

OK

Cancel

The **Status** of the ticket has now changed to **Resolved**:

Ticket Information

Status:

* Resolved

Owner Team:

* Service Desk

Owner:

If required the ticket can be re-opened by selecting REOPEN from the top right menu:



REOPEN

MORE

You will then be prompted with the box below, enter the Reopen reason and click **OK**:

Enter...

Enter reopen reason:

*

Customer has advised issue has returned|

OK

Cancel

The **Status** of the ticket has now returned to **Active**:

Ticket Information

Status:

*

Active

Owner Team:

*

SMO

Owner:

*

Aidan Fay (Aidan Fay)

6. Other Options

As well as **DETAILS** you also have the following:

[DETAILS](#) [TICKET HISTORY](#) [TASK \(0\)](#) [ATTACHMENT \(0\)](#) [MAJOR INCIDENT](#) [PROBLEM](#) [CHANGE \(0\)](#) [CAUSED BY CHANGE \(0\)](#)

The **TICKET HISTORY** tab shows any updates to the ticket, emails sent or notes added:

DETAILS **TICKET HISTORY** TASK (0) ATTACHMENT (0) MAJOR INCIDENT PROBLEM CHANGE (0) CAUSED BY CHANGE (0)

By: naf99 | Sent: 24 minutes ago
 NU Service

Dear Aidan,

IT Service Desk
 Telephone: +44 (0)191 208 5999
 Extension: 85999
[IT Service Desk website](#)

*Please note that only emails from Newcastle University email addresses will be accepted; emails from any other email address will be rejected

The **TASK** tab allows a task to be assigned to another resolver group, this can be completed by clicking **New Task**:

DETAILS TICKET HISTORY **TASK (1)** ATTACHMENT (0) MAJOR INCIDENT PROBLEM CHANGE (0) CAUSED BY CHANGE (0)

Then entering the required details, including Team and clicking **Save**:

New Task

Summary

* Cannot rebuild machine - can you please swapout Status: Logged

Details

* None | **B** | *I* | U | A⁺ | A⁻ | A | ab | [List Icon] | [More Icon]

Cannot rebuild machine - can you please swapout

Team * Desktop Support

Owner

Created By: naf99 **On:** 14/07/2021 15:

Modified By: **On:**

Comments

Save Cancel

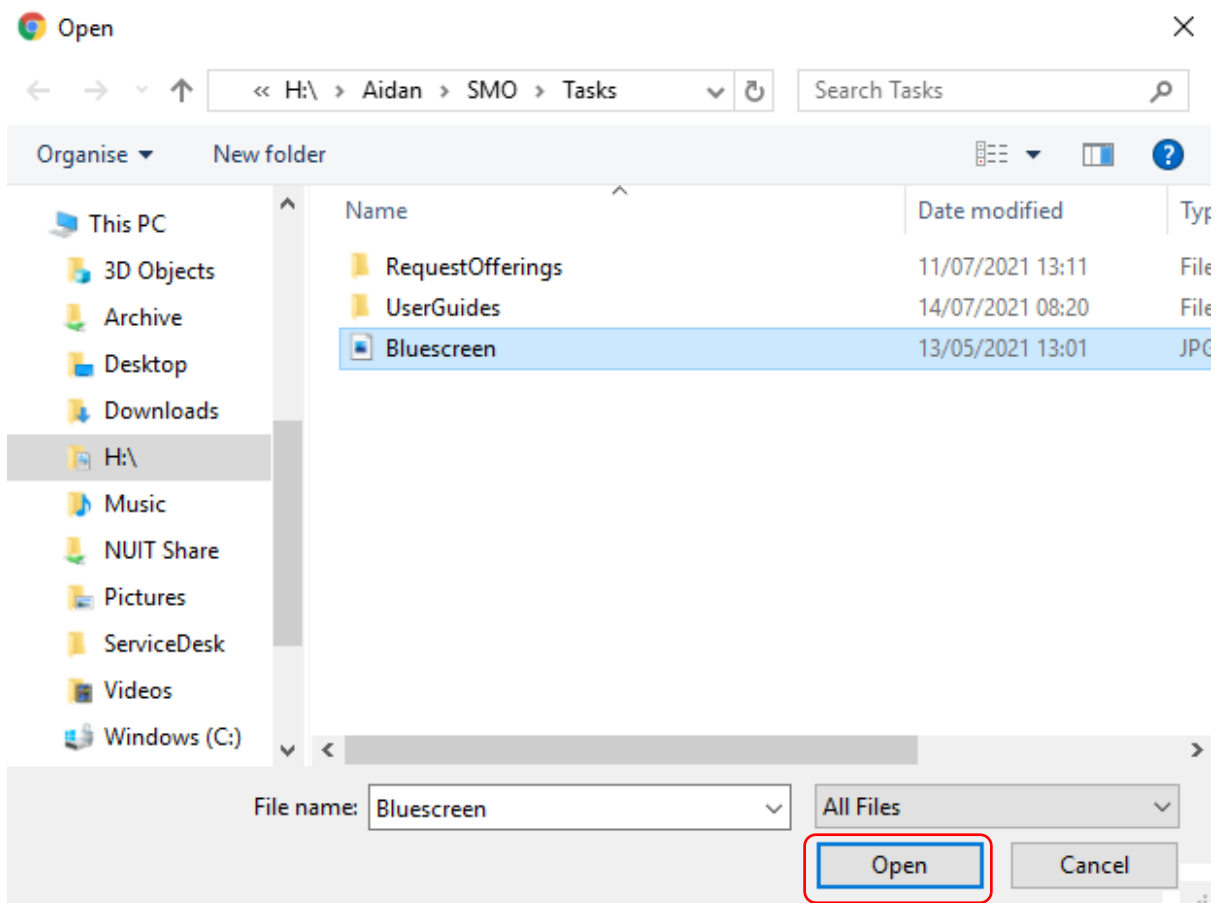
The task is then added to the ticket:

DETAILS	TICKET HISTORY	TASK (1)	ATTACHMENT (0)	MAJOR INCIDENT	PROBLEM	CHANGE (0)	CAUSED BY CHANGE (0)
New Task → Go to Complete Cancel							
Task ID	Subject	Status	Team	Owner	Created On	Modified On	
1002049	Cannot rebuild machine - can you please swapout	Logged	Desktop Su...		14/07/2021 ...	14/07/2021 ...	

The **ATTACHMENT** tab, as well as viewing attachments already added allows files to be added to the ticket. This can be performed by clicking **New Attachment**:

DETAILS	TICKET HISTORY	TASK (1)	ATTACHMENT (0)	MAJOR INCIDENT	PROBLEM	CHANGE (0)	CAUSED BY CHANGE (0)
New Attachment New URL							
Attachment	Description	Size	Created On	Modified On			

You are then prompted to browse to the file to be attached, then click **Open**:



The file is now attached:

DETAILS	TICKET HISTORY	TASK (1)	ATTACHMENT (1)	MAJOR INCIDENT	PROBLEM	CHANGE (0)	CAUSED BY CHANGE (0)
New Attachment	New URL						
Attachment	Description	Size	Created On	Modified On			
Bluescreen.JPG		21 KB	14/07/2021 15:14	14/07/2021 15:14			

The **MAJOR INCIDENT** tab allows the Incident to be attached to a current Major Incident, this can be completed by clicking the **Link** option:

** Note This can also be performed by clicking the LINK THIS TO AN MI button at the top of the page:

[← BACK TO ALL IN](#)
[SAVE](#)
[ADD NOTE](#)
[NOTIFICATION](#)
[ASSIGN TO ME](#)
[INCIDENT TEMPLATE](#)
[LINK THIS TICKET TO AN MI](#)

[DETAILS](#)
[TICKET HISTORY](#)
[TASK \(1\)](#)
[ATTACHMENT \(1\)](#)
[MAJOR INCIDENT](#)
[PROBLEM](#)
[CHANGE \(0\)](#)
[CAUSED BY CHANGE \(0\)](#)

[Link](#)
[Unlink](#)
[Go to](#)

Problem: None Added

Major Incident: None Added

You then need to highlight the Major Incident and click **Select**:

where Incident

Ticket ID	Summary	Created	Current Status	Customer ID	Customer Full
1002008	MI test 1	13/07/2021 15:53	Active	nljc	Lucy Bolt (Lucy Bolt)
1002006	Testing creating incident	13/07/2021 14:57	Active	nljc	Lucy Bolt (Lucy Bolt)
1001994	Test downgrade MI	12/07/2021 13:14	Active	nsw81	Stephen Wear
1001977	Self service close test	12/07/2021 11:16	Active	nsw81	Stephen Wear

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Add Edit

Select Cancel

This then links the Incident to a Major Incident:

DETAILS
TICKET HISTORY
TASK (1)
ATTACHMENT (1)
MAJOR INCIDENT
PROBLEM
CHANGE (0)
CAUSED BY CHANGE (0)

Link
Unlink
Go to

1002008
Description: MI test 1

Customer Name: Lucy Bolt (Lucy Bolt)
Email: Lucy.Bolt@newcastle.ac.uk
Phone:
Owner: Lucy Bolt (Lucy Bolt)

The **PROBLEM** tab allows the Incident to be attached to a current Problem, this can be completed by clicking the **Link** option:

DETAILS
TICKET HISTORY
TASK (1)
ATTACHMENT (1)
MAJOR INCIDENT
PROBLEM
CHANGE (0)
CAUSED BY CHANGE (0)

New
Link
Unlink
Go to

You then need to highlight the Problem and click **Select**:

where
Problem
Begin with
fx
+
X
Search

Problem	Summary	Status	Type	Priority	Owner	Category	Source
1001654	hh	Logged	Problem			Account Lockout	Event M
1001271	blah blah blah	Active	Known Error	3		Performance Is...	Service
1001260	problem	Deactivated	Problem	2		Applications	Service
1001226	log a problem	Identified	Known Error	1		Backup	Proactiv

Page Size 10
Page 1 of 4
Select
Cancel

This then links the Incident to a Problem:

DETAILS TICKET HISTORY TASK (1) ATTACHMENT (1) MAJOR INCIDENT **PROBLEM** CHANGE (0) CAUSED BY CHANGE (0)

 **New**  **Link**  **Unlink**  **Go to**

Problem: 1001654

Summary

* hh

Error Message

Description

* hh

Resolution Detail

Action

Resolution

Environment

Workaround

Type Problem

Status* Logged

Category* Account Lockout

Source* Event Management

Urgency

Impact

Priority

Team Problem Management

Owner

Created By: npb48

Last Mod By: npb48

On: 09/06/2021 09:...

On: 09/06/2021 09:...

The **PROBLEM** tab also allows a new Problem to be created from the Incident, this can be completed by clicking the **New** option:

DETAILS TICKET HISTORY TASK (1) ATTACHMENT (1) MAJOR INCIDENT **PROBLEM** CHANGE (0) CAUSED BY CHANGE (0)

 **New**  **Link**  **Unlink**  **Go to**

Problem: None Added

The details of the Incident are then copied over to the new Problem, complete **Error Message**, **Category**, **Urgency** and **Impact** as shown below and click **Save**:

New Problem

Problem: 1002052

Summary

* Receiving bluescreen when switching on machine

Error Message

Bluescreen message attached

Description

* Have restarted machine several times and receive the message below:<div>
</div><div></div>

Resolution Detail

Action None

Resolution

Environment

Workaround

Type Problem
Status* Logged
Category* Software Failure
Source* Proactive Problem Mgmt

Urgency Medium
Impact One Service
Priority 3

Team Problem Management
Owner

Created By: naf99 On: 14/07/2021 15:00
Last Mod By: naf99 On: 14/07/2021 15:00

Save Cancel

This then links the Incident to a new Problem:

DETAILS TICKET HISTORY TASK (1) ATTACHMENT (1) MAJOR INCIDENT **PROBLEM** CHANGE (0) CAUSED BY CHANGE (0)

[New](#) [Link](#) [Unlink](#) [Go to](#)

Problem: 1002052

Summary
* Receiving bluescreen when switching on machine

Error Message
Bluescreen message attached

Description
* Have restarted machine several times and receive the message below:<div>
</div><div></div>

Resolution Detail
Action None

Resolution

Type Problem
Status* Logged
Category* Software Failure
Source* Proactive Problem Mgmt

Urgency Medium
Impact One Service
Priority 3

Team Problem Management
Owner

Created By: naf99 On: 14/07/2021 15:00
Last Mod By: naf99 On: 14/07/2021 15:00

The **CHANGE** tab allows the Incident to be attached to a up and coming Change that will resolve the issue, this can be completed by clicking the **Link** option:

DETAILS TICKET HISTORY TASK (1) ATTACHMENT (1) MAJOR INCIDENT PROBLEM **CHANGE (0)** CAUSED BY CHANGE (0)

[New Change](#) [Link](#) [Unlink](#) [Go to](#)

Change	Summary	Status	Change Type	Owner	Service

You then need to highlight the change and click **Select**:

✕

where

Begin with

fx
+
×
Search

Change	Summary	Status	Change Type	Owner
1002030	Testing Emergency Change	Emergency Change ...	Emergency	Lisa Renney (Li
1002028	Testing Significant Change	Change Manager Re...	Normal	Lisa Renney (Li
1002027	Testing create Minor Change	Draft	Normal	Lisa Renney (Li
1001950	Testing Change Ticket Summary	Pending Submission...	Normal	Lisa Renney (Li

Page Size

 Page 1 of 5
 ◀ ▶ 🔍

Add
Edit
Select
Cancel

This then links the Incident to a Change:

DETAILS	TICKET HISTORY	TASK (1)	ATTACHMENT (1)	MAJOR INCIDENT	PROBLEM	CHANGE (1)	CAUSED BY CHANGE (0)
---------	----------------	----------	----------------	----------------	---------	-------------------	----------------------

New Change
Link
Unlink
Go to

Change	Summary	Status	Change Type	Owner	Service
1002030	Testing Emergency Change	Emergency Change ...	Emergency	nlld	

The **CAUSED BY CHANGE** tab allows the Incident to be attached to a Change that caused the issue, this can be completed by clicking the **Link** option:

DETAILS	TICKET HISTORY	TASK (1)	ATTACHMENT (1)	MAJOR INCIDENT	PROBLEM	CHANGE (1)	CAUSED BY CHANGE (1)
---------	----------------	----------	----------------	----------------	---------	------------	-----------------------------

Link
Unlink
Go to

Change	Summary	Status	Change Type	Owner	Service
--------	---------	--------	-------------	-------	---------

Declaring an Incident as a Parent Incident

From within an incident you have the option of making it a Parent Incident, this option is shown below:

☐ **Declare as Parent Incident**

Once selected you will receive another tab at the bottom of the Incident:

School/Department: School/Department:

☒ Include Reported By Email ☒ Declare as Parent Incident

DETAILS TICKET HISTORY TASK (1) ATTACHMENT (1) **MAJOR INCIDENT** PROBLEM CHANGE (1) CAUSED BY CHANGE (1) **CHILD INCIDENTS (PARENT) (0)**

[Link](#) [Unlink](#) [Go to](#)

The **CHILD INCIDENT (PARENT)** tab allows child Incidents to be attached to the Incident, this can be completed by clicking the **Link** option:

DETAILS TICKET HISTORY TASK (1) ATTACHMENT (1) MAJOR INCIDENT PROBLEM CHANGE (1) CAUSED BY CHANGE (1) **CHILD INCIDENTS (PARENT) (0)**

[Link](#) [Unlink](#) [Go to](#)

Ticket ID	Summary	Created	Current Status	Customer ID	Customer Full Name	Service
-----------	---------	---------	----------------	-------------	--------------------	---------

You then need to highlight the required Incident and click **Select**:

where Incident Begin with

Ticket ID	Summary	Created	Current Status	Customer ID	Customer Full N
1002051	Self service close test	14/07/2021 15:25	Active	nlb137	Lisa Barclay (L
1002048	Receiving bluescreen when switching on machine	14/07/2021 13:43	Active	naf99	Aidan Fay (Aid
1002047	New ticket	14/07/2021 13:22	Active	naf99	Aidan Fay (Aid
1002017	MI test 1	13/07/2021 16:16	Active	nsw81	Stephen Wear

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[Add](#) [Edit](#) [Select](#) [Cancel](#)

This then links the Incident:

DETAILS TICKET HISTORY TASK (1) ATTACHMENT (1) MAJOR INCIDENT PROBLEM CHANGE (1) CAUSED BY CHANGE (1) **CHILD INCIDENTS (PARENT) (1)**

[Link](#) [Unlink](#) [Go to](#)

Ticket ID	Summary	Created	Current Status	Customer ID	Customer Full Name	Service	Category	Subcategory
1002051	Self service close test	14/07/2021 15:25	Active	nlb137	Lisa Barclay (Lisa Barcl...	AV	Event Support	Event Support

End of Document