BMC Remedy 8.1 – New Features Release

Process Owner: Service Desk Manager

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## Document Revision History

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CANNED EMAIL RESPONSES

Canned email responses were identified as a need in response to the new client contact features via email and the email resolution requirement made in the BMC Remedy 8.1 upgrade. This new feature will provide Remedy users the ability to select predetermined responses to common questions and requests. This feature provides a method of managing both individual and group level responses.

1.1 CREATING A CANNED RESPONSE

1) To email your client, you may select the email icon next to the client’s username (in either Requested For or Requested By).

You can also select the Send “Requested For” Email or Send “Requested By” Email buttons to email your client.

2) Compose the contents of your email in the Email Message field, and select Add to add the message to your canned responses.
3) A window will pop up to create and file the canned response. The contents of the Email Message have been copied directly into the Email Body of the canned response form.

![Folder, Description, Email Body fields]

Link To Summary: No
Incident Type*: User Service Restoration
Summary: Computer - Service

![Save, Cancel buttons]

4) You may create a new folder, or select a folder, to keep your canned responses organized by subject. Type into the Folder field to create a new folder.

Folder: Computer Service
Description:

Select the drop down menu next to the Folder field to select an already existing folder.

Folder: Computer Service
Description: Email Compromises

5) Add a Description for the canned response.

Folder: Computer Service
Description: Escalate to Tech Services

6) Make any revisions that are necessary for your canned response in the Email Body field.
7) You can select Yes to link the canned response to the Summary that originated this email message. The Summary has already been selected into the Link to Summary section from the original ticket that generated the email. Once you have linked a canned response to a Summary, when you select that specific Summary you will only see the canned responses that are linked to it. Linking a canned response to a Summary is beneficial because it narrows down the options to only responses for that specific Summary.

8) Click on Save.

9) You will be returned to a new email composition window, where you can select your new canned response to send to your client.
1.2 MANAGING YOUR CANNED RESPONSES

The new canned email response feature includes a method of managing individual, group, and ITS responses.

- Individual responses are created and managed by the Remedy user. Individual responses are only available for use by the Remedy user that created them.
- Group responses are created and managed by the support group manager. The support group manager can request that another individual of their group have the permissions to create and manage group level responses. Group responses are available for use by the members of the manager’s support group.
- ITS responses are available for use by all members of ITS. ITS responses are currently created and managed by the Service Management Systems group.

1.2.1 Accessing Manage Responses

1) You may access Manage Responses from:

a) The Incident Management Console
b) An Incident

![Incident Management Screen](image1)

```
Quick Action
- Create Relationship to
- Create Related Request
- Print
- Customer's Incidents
- View Audit Log
```

**Requested For**
- Name: Joel Gamble
- User Name: jegamble
- Pref Name: Joel
- UD: 
- Phone: 338-334-5092
- Campus OU: ITS-23101
- Department: Information Technology!
- Campus Address: 102 McNutt Building
- Additional Information: 

**Incident Type**: User Service Restoration
**Summary**: Computer - Service

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c) A new email message

![Email Message](image2)

```
To: jegamble@uncg.edu
CC: slwood@uncg.edu
BCC: 

Email Subject Line: Regarding Incident # INC00000608700 - Computer - Service

Email Message:

Manage Responses
```

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11/13/2015
2) A new window will pop up to open Manage Canned Responses.

1.2.2 Individual Responses

Individual responses are created and managed by the Remedy user. Individual responses are only available for use by the Remedy user that created them.

1) Open Manage Responses.
2) Select Individual Response.
3) A window will pop up to create and file the canned response.

   Category
   Folder
   Description
   Email Body

   Link To Summary
   Incident Type*
   Summary
   Summary ID

   Save   Cancel

4) Click on the drop down menu in the Category field, and select either Resolution or Outgoing Mail. When creating a canned response from Manage Responses, you will have to select the category. However, when creating a canned response directly from a new email, Remedy is able to identify if the email is being created as an Outgoing Mail (Work Info) or a Resolution email.

   Category  Resolution
   Folder  Outgoing Mail
   Description

5) You may create a new folder, or select a folder, to keep your canned responses organized by subject. Type into the Folder field to create a new folder.

   Category  Resolution
   Folder  Password Reset
   Description
a) Select the drop down menu next to the Folder field to select an already existing folder.

6) Add a Description for the canned response.

7) Compose the contents of the canned response in the Email Body field.

8) Select Yes from the Link To Summary drop down menu to link the canned response to a Summary.
9) You will have to manually select the Summary that you are linking to your new canned response.

a) Select the Incident Type.

b) Click on the dropdown menu of the Summary field to select the appropriate Summary to link to your canned response.
10) Click on Save.

11) Your canned response will be added to the list of your individual canned responses, which you can view in the Manage Canned Responses window.
1.2.3 Group Responses

Group responses are created and managed by the support group manager. Group responses are available for use by all members of that support group.

- The support group manager can request that another individual of their group have the permissions to create and manage group level responses. To make this request, the support group manager will need to send an Incident to Service Management Systems with the summary: Remedy – Add/Change Canned Response Permissions.

1) Open Manage Responses.
2) Select Add Group Response.
3) Select the appropriate Support Group for this canned response in the drop down menu.
4) Complete the Add Group Response form. This form is the same as outlined in Individual Responses. Click Save to continue.

5) To view the group canned response, return to Manage Responses. Select the drop down menu on the Type field, and select Group.
6) Select the appropriate group from the Group field.

7) Your group canned responses will appear.

1.2.4 ITS Responses
ITS responses are available for use by all members of ITS. ITS responses are currently created and managed by the Service Management Systems group. Please contact Service Management Systems if you would like a canned response to be created for all of ITS’ use.

1) Open Manage Responses.
2) Select Add ITS Response.
3) Complete the Add ITS Response form. This form is the same as outlined in both Individual and Group Responses. Click Save to continue.

4) To view the ITS canned response, return to Manage Responses. Select the drop down menu on the Type field, and select ITS.
5) The ITS canned responses will appear.

1.2.5 Editing an Existing Canned Response
1) Open Manage Responses.
2) Select the appropriate canned response Type.
3) Select the canned response you wish to edit, and click on the Modify button.

4) Make your edits in the canned response form.

5) Click Save to continue.
1.2.6 Deleting a Canned Response

1) Open Manage Responses.
2) Select the appropriate canned response Type.

3) Select the canned response you wish to delete, and select the Delete button.

4) Your canned response will be removed from the list.
1.3 SENDING A CANNED RESPONSE TO A CLIENT

1) To email your client, you may select the email icon next to the client’s username (in either Requested For or Requested By).

You can also select the Send “Requested For” Email or Send “Requested By” Email buttons to email your client.

2) Click on the drop down menu in the Select field in the Canned Responses box.
3) Select the appropriate Type (Individual, Group, or ITS), Category, and Description of the desired canned response.

4) Your canned response will appear in the Email Message field.

5) Select Send Email Now.
2 SIGNATURE LINE

1) Type in your personalized signature line in the Signature field.

![Signature Line Image]

2) Click on the Save Signature Line button.

![Save Signature Line Button]

NOTE: The Signature Line field is editable at any time. If you wish to include, or omit, certain contact information in your signature line you have the option to edit it on a case by case basis, or save the changes for future use.
3 SEARCHING FOR A SUMMARY BY KEYWORD

This new feature allows Remedy users to select the Incident Type and search for the Summary by keyword. This feature was identified as a need with the introduction of the Incident Type in the BMC Remedy 8.1 upgrade, as feedback indicated a need for a method to easily find a Summary.

1) Create a new Incident.

**NOTE:** These instructions also apply to Search Mode in an Incident.

2) Click on the magnifying glass icon to search for the summary.

3) A Search Summary window will pop up.
4) Select the appropriate Incident Type.

5) Search by keyword in the Summary field. Press Enter. The results will display below.

6) Select your desired Summary, and click on the Select button.
7) The Summary will populate in your new Incident.