# What the Checkboxes in the Incident Management Profile screen mean

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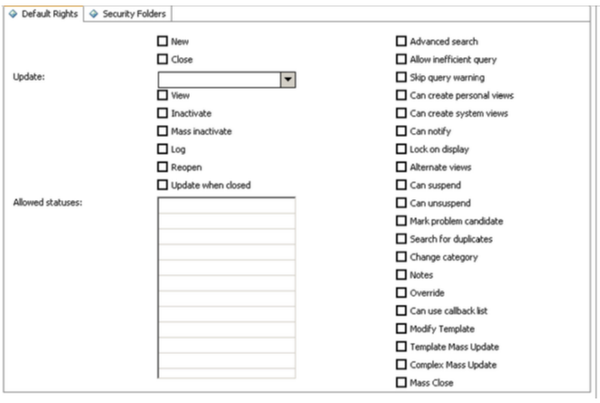
*This document was written by Greg Baker because he couldn't find any other resource for this. It is probably full of mistakes. If you find it helpful, you might find his other writings interesting too - http://www.ifost.org.au/ - or might want to get some training or consulting services from him.*

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# 1 Create / Update / View / Close

The following is just what a typical close-to-out-of-the-box system might show. It's possible to hack the display options (the code which chooses what buttons and icons to display above the ticket) to have completely different rules.

Note that the actual priviledges a user has can also be influenced by what folder a ticket is in (if you have folder enablement set). If there is no visibility (e.g. because of a mandanten rule) then update and closure are impossible as well.

Here are some of the reasons that a ticket might be invisible:

- The ticket could be in a folder which the user doesn't have access to
- The user could be prevented from seeing the ticket because of mandanten
- The ticket could be in a disallowed status

## 1.1 New

If a user's profile includes this, then they can create incidents. They will still need a suitable menu to get to the Open New Incident menu item, or else if they have a Service Desk profile they could escalate an interaction to an incident.

If the user's incident profile includes "New" and they have a a webservices capability word they can raise incidents as well, regardless of the menu. They might use smcli for example.

Even if this is not set, they might be able to create incidents via the "Generate Maintenance" menu.

## 1.2 Close

Whether the user can close an incident ticket. This is not the same as the rights to resolve a ticket, which is Inactivate (below).

## 1.3 Update

This determines under what conditions the operator update a ticket. Out-of-the-box there are three options:

**Never** All incident tickets are read-only.

**Always** This user can modify any ticket that they have visibility. Of course, if the data dictionary or the format has a condition that makes something read-only, then that could stop modification as well. And locking prevents modification as well – you can't modify a ticket that someone else is working on.

**When Assigned** This is only appropriate if there is a member of the team whose job it is to assign work out to staff. If a ticket appears in a queue not assigned to anyone, then staff with the "When Assigned" rights can't assign it to themselves to work on. Many sysadmins find this setup demeaning and complain about it.

## 1.4 View

I can't think of any use for an incident profile that doesn't let you view incidents but does let you do something else. Perhaps the ability to create incidents, but not look at them afterwards?

### 1.5 Inactivate

If you have set the option to "Use Resolved Status" in the Incident Management environment record, then there will be a "Resolved" button instead of a "Close" button. (Once the ticket has been resolved, then the close button appears if the operator has the close-incident-ticket rights.)

This "Resolved" button will only appear if you have the "Inactivate" right enabled here. Why it's not called "Resolved" beats me.

### 1.6 Mass Inactivate

If you have this, you get a button marked "Mass Resolve" at the top of the list of incidents whenever you do a search or open a view. If you don't have folders or mandanten reducing visibility somehow, this checkbox gives the user the right to resolve every open ticket on your system if they want to.

### 1.7 Log

No idea what this does.

### 1.8 Reopen

When an incident is closed, should we be able to re-open it? The SLAs carry on from where they left off.

Reopening tickets makes reporting painful, but it makes it a little easier to actually do IT support work because you don't have to open as many similar tickets.

### 1.9 Update when closed

Sometimes team leaders have this right so that they can amend swear words or other naughtiness by their staff.

### 1.10 Allowed Statuses

This is the list of statuses that the user can set the ticket to.

## 2 Additional Menu Items

Many of these items are off by default, even for the sysadmin.

### 2.1 Advanced Search

When searching for incidents, normally there are three tabs. The last of these is the "Advanced" tab which lets you choose on what fields you want to run a search. This can be an issue if the user has the "partial query" capability word, since it means that they could go and run a weird search that doesn't hit any indexes. Since the probsummary table is one of the biggest in most organisations, this is bad news for the database.

But, it's probably one of the most insanely useful tools. Users and team leaders can use these advanced searches to do stuff that normally would require a DBA or report writer to develop. So I tend to leave it on; generally the staff clueful enough to use it are aware of the implications of it.

### 2.2 Allow inefficient query

It takes a special bad luck to be able to make an inefficient query using the basic search, but it's not hard to do if you have advanced search rights. This can slow down database performance for everyone while it runs.

### 2.3 Skip query warning

If you do create an inefficient query, you should get a dialog box asking you to confirm going ahead with it. This checkbox means that the user doesn't receive this confirmation box. I don't like this option, and I make sure this is always turned off (so that users get do prompted before they do something silly).

### 2.4 Can create personal views

You create your own personal view by running a search and then saving it as a view. You won't have the "save this is a view" if this checkbox is not enabled. You also won't have the option of saving a modification to an existing view.

Be careful of users who create views and then turn on the display count option, as this forces the view to be materialised (run) on a regular basis.

It often makes sense for team leaders to have this option. When they've made a view that they are happy with, they then contact the tool administrator and request that it be made available to their team.

### 2.5 Can create system views

This right lets you take a personal view and make it available to a group (or to everyone). It's often held only by sysadmins or other trusted parties. They take a look at the views created by the team leaders:

1. Make sure that the query includes "=" instead of "#" (begins with), as the former is more efficient
2. That it can run efficiently using the existing keys

### 2.6 Can notify

The Notify menu option lets you send emails, service manager mails (which nobody uses any more) or faxes (don't ask). It is sometimes used as a way of doing in-tool email communication to a customer.

### 2.7 Lock on display

Normally a record is locked the moment you modify something in it. Turning on this option means the moment you open a ticket to view it, you acquire a lock, preventing anyone else from modifying it.

### 2.8 Alternate Views

Very occasionally, there might be two formats for the same table used by different staff. This checkbox lets you choose which view you intend to use. It's useful for sysadmins and developers.

### 2.9 Can suspend

When a ticket is suspended, the SLA clocks pause. It's often appropriate for team leaders to have this right, but in some organisations only the incident management team have this right.

### 2.10 Can unsuspend

This is the right to start the SLA clock ticking again after a ticket has been suspended. It's usually given to the same users who have "Can suspend", but you could also give it to a wider audience.

### 2.11 Mark problem candidate

If you have a problem management profile that lets you create problem tickets, then this checkbox does nothing for you. If you have the rights to create problem tickets, and you think something deserves to be a problem, then go and create it yourself, and don't leave it for someone else to do it.

But if you don't have the rights to create problems, then you probably want to be able to click the "Problem Candidate" checkbox on the `IM.update.incident` screen in order to flag it for some problem manager to pick up on.

### 2.12 Search for duplicates

Not really sure what this is. I think there's a menu item that lets you look for duplicate incidents.

### 2.13 Change category

You really don't want to do this. It lets you completely hijack the category system, e.g. turning a "request for information" into an incident or vice versa.

### 2.14 Notes

Kind of useless. It gives you a menu item that lets you write notes. However, there's no indication anywhere that anyone else has written any notes.

Not to be confused with the journal log, which is the text area where you have to put an update every time you save an incident ticket.

### 2.15 Override

No idea what this does.

### 2.16 Can use callback list

This gives you a menu item which lets you list users who want to know about the status of this ticket. These users are populated into the screen you get to with the Notify button.

### 2.17 Modify Template

This lets you create and modify incident management templates. Access controls on incident management templates are only about using them (if you don't have the right user role you don't get to use them) so anyone with this right can modify any templates created by any other team.

Templates can be used as a way of populating a ticket quickly if you get the same call regularly. But they can also populate other fields, so you can have a template which contains a common solution.

### 2.18 Template Mass Update

There are three kinds of mass update: simple, templated and complex. This gives you the rights to do the simple and templated ones. You get a menu item marked "Mass Update" that appears above any list of results from an incident search. Again, like Mass Inactivate, you can do some gruesome damage here. It's OK for trustworthy users and perhaps incident management personnel.

## 2.19 Complex Mass Update

This gives you the rights to perform a complex mass update, where you write little bits of RAD code to do some magic. You would have to be completely crazy to give this to anyone other than a very experienced Service Manager developer or admin.

## 2.20 Mass Close

Equivalent to Mass Inactivate, only it closes the ticket instead of resolving it.