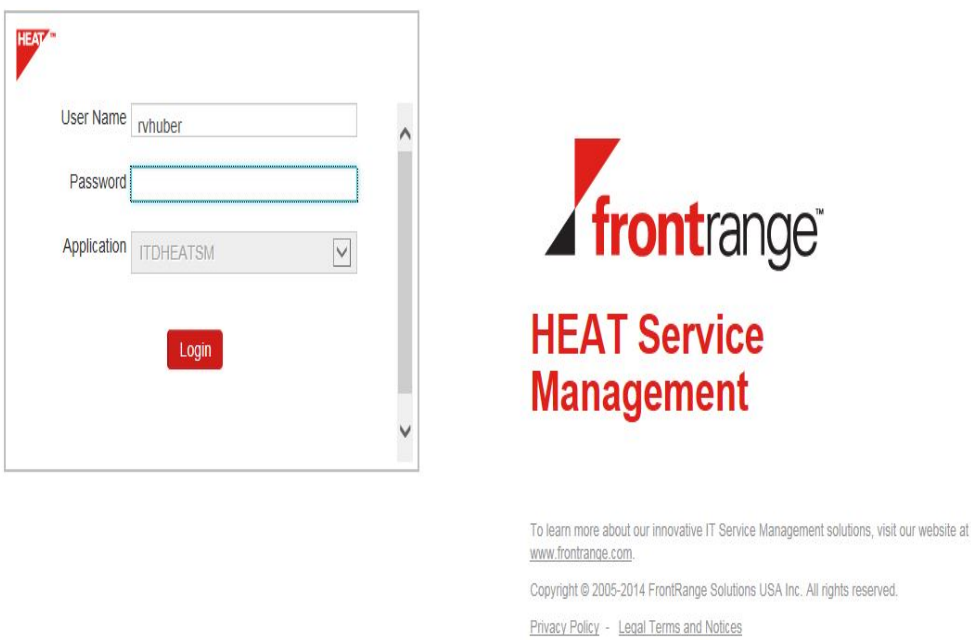
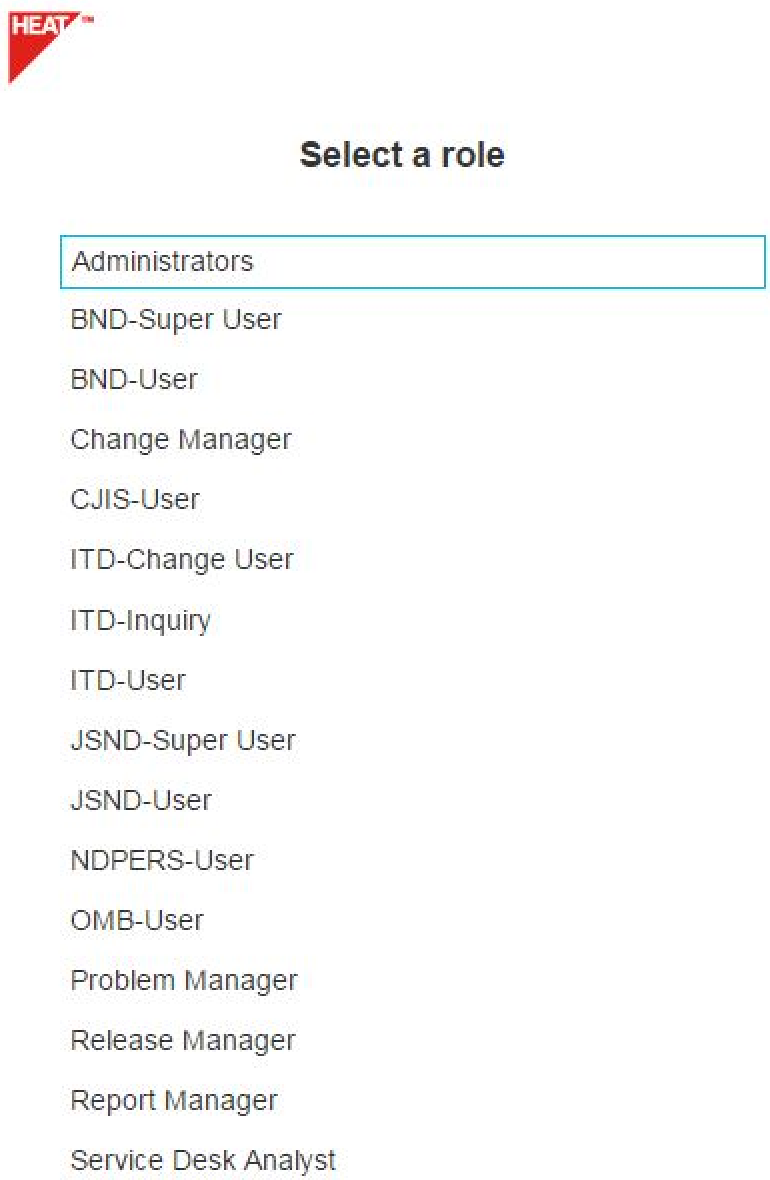
HEAT Quick Reference Guide

How to Log In

1. In a browser, enter the URL for the **HEAT** system (https://heat.nd.gov/HEAT).
   HEAT opens to the login page.
2. Enter your user name and password (this will be your NDGOV login credentials).
3. Click **Login**.

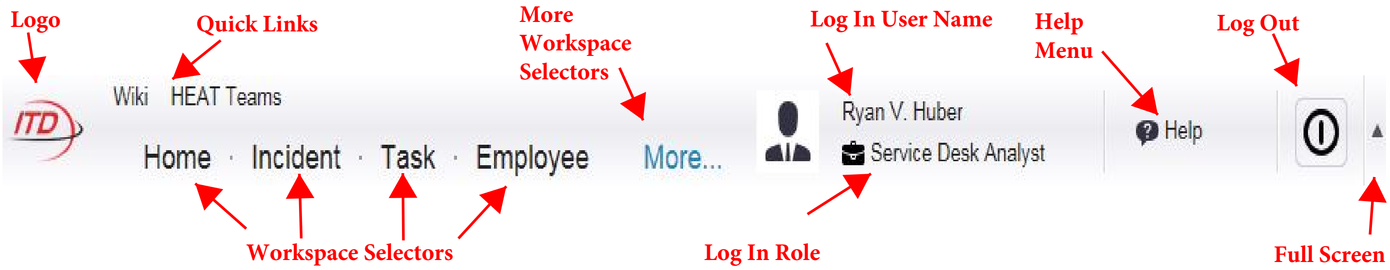


4. Select a role, then click **Continue** (you may have only one role depending your access).



5. You are now logged in and ready to use **HEAT**.

Main Workspace Parts

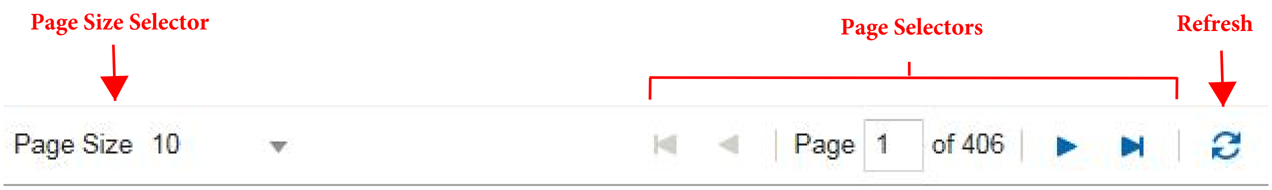


The top header bar has the following components:

- Logo
- Quick Links
- Workspace selectors
- More workspace selectors
- User log in name and role
- Logout button
- Online help
- Full Screen Mode

Other areas include the following:

- Dashboard selector (on Home workspace)
- Watch list
- Page title



The workspace footer bar has the following components:

- Page size selector
- Page number selector
- Previous and next arrows, first page and last page buttons
- Refresh button
- Record details

Creating Incidents

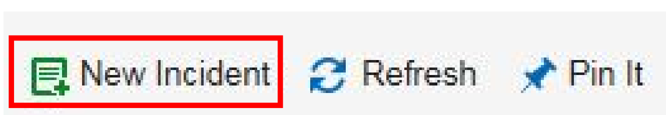
A customer can submit incidents and requests for services directly to the Service Desk via the phone, email, or online submission page. For all incidents or requests, a unique reference number and date time stamp is automatically generated for each newly created record.

Service Desk Analysts, Service Desk Managers, and other designated roles can create a new incidents. If you use a Quick Action when creating an incident, some information in the incident form is automatically generated. You can edit these fields just as you would any other field on the incident form.

Creating an Incident

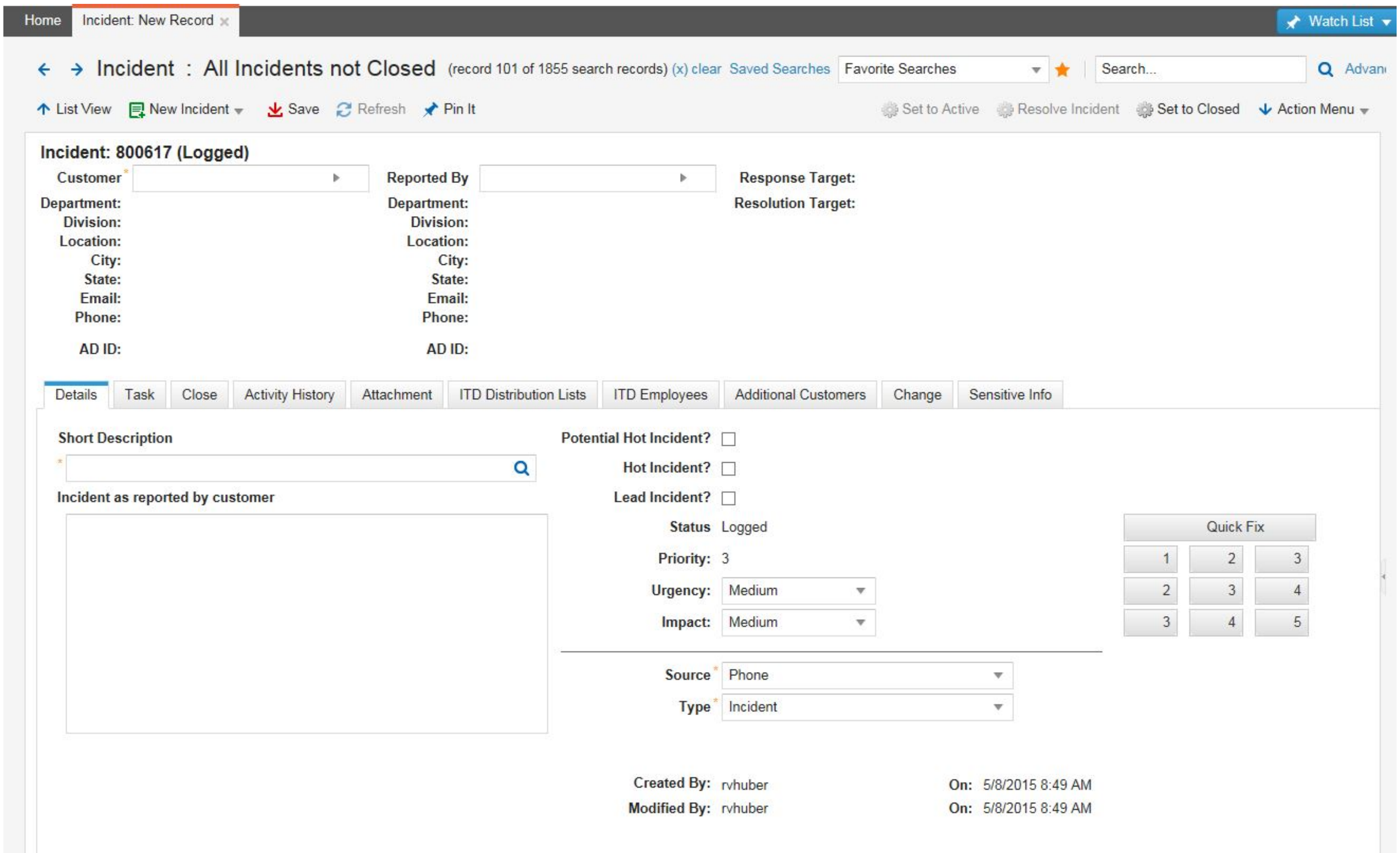
1. Once logged into HEAT, open the Incidents workspace.

2. From the toolbar, click **New Incident** to open a blank form.



3. The first thing that you will notice is the cleaner look of HEAT compared to ITSM. HEAT has the same workflow and escalation processes as ITSM, so you can think of it as a refreshed look to ITSM. One thing that you won't see is all the quick action buttons. These have been moved to the Action Menu (pictured below).

A New Incident Record



The following default tabs appear (not all tabs are visible depending on your assigned role):

- **Details**: Please see the next page for a description.
- **Task**: Previously known as Assignments in ITSM. These can be assigned to a team or to a specific individual on a team.
- **Activity History:** Previously known as Journals in ITSM. These can be either internal communications or customer communications.
- **Close**: This tab contains information about the closing details, but it also contains the Detail Screen section, Service Name, and Configuration Item.
- **Attachment:** Used to attach a file or URL.
- **ITD Distribution Lists**: Add an ITD distribution list on the communications.
- **ITD Employees:** Add an individual ITD employee on the communications.
- **Additional Customers**: Add an individual customer outside of ITD on all communications.
- **Change**: Used to link a Change record to an Incident or create a Change record.
- **Sensitive Info**: Used for sensitive information including, but not limited to Social Security numbers, HIPAA data, student names, and any other sensitive info that you don't want to be displayed to customers or on reports.

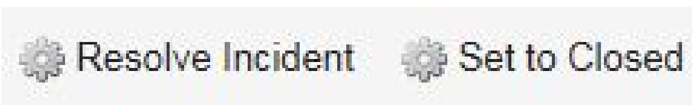
3. Enter information into the fields.

Field	Description
Customer	The customer name to search. If the name is not on the database, you must create a new customer.
Reported by	Your name (or the name of the person reporting the incident).
Location, Email, Phone	Automatically generated from the customer or employee record.
Short Description	A summary of the incident. Click **Search** (magnifying glass) to find matching incidents. A list of possibly related items appear in under Related Items. Click an item to view more information.
Incident as reported by customer	Description of the incident with relevant details.
Type	You can choose to change the incident into a request.
Source	How the incident was submitted. Select from the drop-down list.
Impact	Impact to the organization, group, or individual. **High:** Has a major impact on the organization. **Medium:** Has some effect on the organization but generally not considered a large effect. **Low:** Does not have much effect on the organization. **Quick Fix:** Something that you're able to fix/solve immediately.
Urgency	The time appropriateness required. **High**: A necessity, needed immediately with a high degree of urgency. **Medium**: Required, but can be made after higher urgency changes have been implemented. **Low**: Required, but can wait for other changes of greater urgency to be implemented. **Quick Fix:** Something that you're able to fix/solve immediately.
Priority	Impact and urgency together define the priority value.The default value is 3.
Status	The status of the incident. If you are creating the incident for the user, the status is set to *active*. When the incident is submitted by the user or through email, the status is *logged*.
Priority Matrix	You can either manually select the Urgency and Impact or you can use the priority matrix. Once you select the proper number in the matrix, the Urgency and Impact will be calculated automatically.
Lead Incident	This incident is the lead call over other similar reported incidents.
Linked Incident	This incident has been designated as part of larger Lead Incident and thus was linked to it. The Lead Incident number will appear in the Link Incident.
Hot/Potential Hot Incident	The initiation of these processes are a result of an event deemed important and a need of heightened awareness by ITD (Pertains to ITD only).

4. Click **Save** from the toolbar.
   - The requester is notified that the incident has been submitted.
   - The incident assignee and manager of the team that the assignee belongs to are notified of the incident assignment via email.
   - Click **Refresh** to view the resolution target values.

Resolving/Closing Incidents

When you are finished working on an incident and wish to complete it, you have two options available; you can either Resolve it or Set it to Close. These options are avaiable on the top tab bar (pictured below).



Although they seem like the same thing, they are not. Here's what each one does:

Resolve Incident:
• When an incident is set to resolved, the customer gets notified and has the option of changing the status of the incident if the resolution is not satisfactory. After 5 days in the resolved status, the incident is automatically set to closed.

Set to Closed:
• When the incident is set to closed, an email notification of the closure is sent to the customer. The drawback of this is if the customer isn't satisfied, then a new incident will need to be created. You are not able to change the status of a closed incident.

Resolving/Closing an Incident

1. Within the incident record, ensure that all of the fields accurately reflect the issue and resolution. You will also need to fill out all the required fields before you are able to Resolve/Close the incident. The required fields which are in Close tab are *Underlying Cause* and *Closed Information Sent to the Customer*. If the SLO was missed, then you need to select one of the options next to *Why was SLO missed?*.
2. Ensure any pending tasks are set to *closed* or *canceled*.
3. Set the incident status to resolved or *closed*.
4. Click **Save**.

The incident is resolved or closed, and an email notification is sent to the requester notifying them of the status change.