bmcsoftware

BMC Track-It!

Self Service Guide

Version 11.1

Table of Contents

BMC Track-It! Self Service Overview

BMC Track-It! Self Service is a Web-based application that enables you to submit your own Work Orders and check the status of your requests.   You can attach files, such as screenshots, to Work Orders.

You can audit your computer and change your password.

Change Management approvers can also approve Requests for Change with Self Service.

Additionally, you can search for internal BMC Track-It! Solutions.

Note: Online help is available once you log in to Self Service. The topics in the online help are also available in the BMC Track-It! Self Service Guide (PDF) on the [Product Documentation section of our Support Web page](http://support.numarasoftware.com/support/updates.asp?product=2&content=Documentation&version=111&Offering=2&lang=EN)
http://support.numarasoftware.com/support/updates.asp?product=2&content=Documentation&version=11 1&Offering=2&lang=EN

To Access Self Service Web:

1. Go to the URL provided by your BMC Track-It! Administrator (typically `http://servername/TrackItWeb/SelfService` where "`servername`" is the name of the server).
2. Enter your user name and password and click the **Login** button.

    The **Self Service Center** page displays.

    Important Note: If your BMC Track-It! Administrator has enabled NT Authentication, the following URL should be used instead: `http://servername/TrackItWeb/SelfService/Login` where "`servername`" is the name of the server.

    When NT Authentication is enabled and configured with your windows login, and if the URL shown above is used, Self Service will automatically open, and you won't need to log in.

3. To access WebHelp, click the **Help** button on the menu bar.

Searching the Solutions Database

BMC Track-It! Self Service enables you to search the Solutions database for Work Order resolutions. Solutions can contain rich text formatting, images, and file attachments.

To access Self Service, see [BMC Track-It! Self Service Overview](#).

To Search for Solutions:

1. Click **Search for Solutions** from the **Self Service Center** home page**.**
You can also access the **Solutions** page from the **Solutions** link on the left pane of the **Self Service Center.**
2. Enter the keyword in the **Search** field on the **Search for Solutions** page, then press the **Enter** key or click the **Search** button.

    The search results display in a grid.

    Tip: To view all solutions, enter an asterisk (*) or the percent symbol (%) in the **Search** field, which is the wild card character, then press the **Enter** key or click the **Search** button.

3. Select a solution to view details in the preview pane.
4. To print the solution's details, select the solution and click the **Print** button on the **Solutions** toolbar.

    A report page displays with the following details: Solution ID, Summary, Last Modified, Details, and Attachments.

To View a Solution's Attachments:

1. From the grid view, select the solution.
2. In the preview pane, click the **attachment name** link, e.g. "image.jpg". Follow the instructions for your particular browser to open or save the file.

Adding a New Work Order

With BMC Track-It! Self Service, you can add a Work Order to request services from your organization's help desk, such as resolving problems, help with installations, and requests for training. You can also view any of your previous Work Orders.

To access Self Service, see BMC Track-It! Self Service Overview.

To Add a Work Order:

1. Click **Add a New Work Order** from the **Self Service Center** home page**.**
   You can also add a new work order from the **My Work Orders** page from the **My Work Orders** link on the left pane of the **Self Service Center.** (See Viewing Previous Requests.)

2. Click **Add a New Work Order** to open a new work order.
3. Enter a short summary of the problem in the **Summary** field.

   You can add more details (if necessary) in the **Notes** textbox at the bottom of the form.

4. Enter a phone number in the Call Back Number field. (This should be a number where the technician can reach you at during business hours.)
5. Select the **Priority, Type, Sub-Type, and Category** from the options in the drop-down lists based on the type of action required.
6. Describe the problem or request in the **Notes** textbox.
7. If you want to add an attachment (screen capture, document, or anything else that may help explain your issue):
   a. Click the **File Name Browse** button to locate the file that you want to attach.
8. In the **Add Attachment** dialog, navigate to the location of the file, then click the **OK** button. The file name displays in the **File Name** field.
9. Click the **Submit** button.
   The **View Work Order** page displays with the Work Order details.

To Add Information to a Submitted Work Order:

Once you've submitted a Work Order, you can add a note, but you won't be able to edit any of the information.

1. On the **View Work Order** page, click the **Add Notes** button.
   (If the View Work Order page is not open, open it from the **My Work Orders** link on the left pane of the **Self Service Center**, then click the Work Order ID.)
2. On the **Add Notes** dialog, enter the information in the Notes textbox, then click the **OK** button.

Viewing Previous Work Orders

To access BMC Track-It! Self Service, see [BMC Track-It! Self Service Overview](#).

To View a Previously Submitted Work Order:

1. Click **View My Work Orders** from the **Self Service Center** home page**.**
   You can also view your work orders from the **My Work Orders** page from the **My Work Orders** link on the left pane of the **Self Service Center.**
2. Click the **Open Work Orders**, **Closed Work Orders**, or **All Work Orders** tab to view your work orders.
3. Click the **ID** link to view the details of the request.

The table below provides a description of each of the fields contained in a work order.

Work Order Fields

Field Name	Description
ID	Work Order ID number
Requestor	Name of the user submitting the work order
Call Back Number	Your number to be contacted by the Technician
Asset	A unique identifier for your specific asset
Status	The current condition of your work order (e.g., open, escalated, closed, cancelled, etc.)
Summary	A brief statement of the problem, issue, or request
Priority	A level of urgency and impact to your organization, based on your company's business rules and Service Level Agreements (SLA).
Type	General identifier for the request (e.g., hardware, software, configuration, training, etc.)
Subtype	More detailed identifier for the request (e.g., failure, upgrade, etc.)
Category	Greatest level of detail for the request (e.g., PC, Macintosh, hard drive, memory, monitor, etc.)
Assigned Technician	The name of the technician assigned to resolve the work order
Date Entered	That date the request is entered
Date Assigned	The date and time the request was assigned to a technician for resolution
Expected Completion Date	The date the request should be completed
Date Completed	The date and time the Work Order was completed (resolved)
Notes	Text entered by the requestor to describe the problem or request in more detail
Technician Notes	Text entered by the Technician to describe the problem or request in more detail
Notification messages	E-mail messages from Technicians and your e-mail responses
Resolution	A short description of what was done to resolve the issue.

Attachments   Files attached to the Work Order

Closing and Canceling Your Own Work Orders

You can close your own Work Orders if you've found your own solutions, or if you want to cancel your Work Order because a problem no longer exists.

To access Self Service, see BMC Track-It! Self Service Overview.

To Find the Work Order:

See Viewing Previous Work Orders.

To Close or Cancel Your Own Self Service Work Orders:

1. On the **View Work Order** page, click the **Cancel Work Order** button on the Work Order toolbar.

   (If the View Work Order page is not open, open it from the **My Work Orders** link on the left pane

   of the **Self Service Center**, then click the Work Order ID.)

   If you don't see the Work Order, click the **All Work Orders** tab.

2. On the **Cancel Work Order** confirmation dialog, enter a reason for the cancelation.

   For example, you might want to enter: "The problem no longer exists," or "I resolved it myself."

   The **View Work Order** page displays with a message that the Work Order was successfully

   cancelled. The cancelled Work Order displays on the **Closed Work Orders** tab of the **My Work**

   Orders page with a status of "Closed".

Installing Mac Audit Files on Macintosh Computers

In order for your BMC Track-It! technician to audit your Macintosh computer, you will need to install the Mac Audit files they send you via e-mail or from a shared network folder.

To Install BMC Track-It! Mac Audit Files on Your Macintosh Computer:

1. Save the **OSXAuditInstaller.pkg.tgz** file that you receive from your BMC Track-It! administrator to your desktop.
2. Double click the installation package (**OSXAuditInstaller.pkg**) to extract the installer to your desktop.
3. Double click the installer package (.pkg) to launch the installation.

   The **Install Mac Audit** dialog displays.

4. Click the **Continue** button.
5. Select a location in your file directory to save your file.
6. Click the **Restart** button when prompted.

   Your computer will be rebooted and the installation will be complete.

Auditing Your Computer

You can audit your computer from BMC Track-It! Self Service. This provides your BMC Track-It! Technician with information about your hardware and software. You can audit your computer even if you are running remotely from a different computer.

To access Self Service, see [BMC Track-It! Self Service Overview](#).

To Audit Your Computer:

1. Click the **My Assets** link on the left pane of the **Self Service Center** page.
2. Select the Asset you want to audit from the **Asset** drop-down list.
3. Click the **Audit** button on the **My Assets** toolbar.
4. Click the **OK** button when the **Audit** message displays that the audit request has been queued successfully.
   The results of the audit display. The audit date and time displays in the **Audit Date** field.

Changing Your Password

If your BMC Track-It! Administrator has given you permissions or requested you to change your password, you can change it on the My Profile page in BMC Track-It! Self Service.

To access Self Service, see [BMC Track-It! Self Service Overview](#).

To Change Your Password:

1. Click **My Profile** link on the left pane of the **Self Service Center.**
2. Click the **Change My Password** button on the **My User Account** toolbar.
3. On the **Change Password** dialog, enter your current password in the **Old Password** field.
4. Enter a new password in the **New Password** field.
5. Enter the new password in the **Confirm New Password** field, then click the **OK** button.

Change Management

Change Management Overview (Approvers)

The BMC Track-It! Change Management module provides an automated process to track and manage Requests for Change in your organization. When a Work Order is created that matches the criteria defined in a Change Management Policy, it creates an associated Request for Change that is automatically placed into the approval process. Requests for Change are managed by the Work Order's Assigned Technician in the BMC Track-It! Technician Client. Approvers who have been assigned to the Request for Change communicate and vote through BMC Track-It! Self Service. Automatic notifications can be set up so that Approvers and Technicians are notified about specific events in the Request for Change's lifecycle.

Approvers
Approvers are the change management team members who vote to accept or reject Requests for Change. They can view information and comments, communicate, and vote on a Request for Change using BMC Track-It! Web. (A Request for Change is considered approved when all Approvers have approved, based on the number of approvals required.)

Note: It is not necessary for Approvers to have a license to use BMC Track-It! Self Service; their BMC Track-It! Administrator only needs to provide them with a login user name.

To access Self Service, see BMC Track-It! Self Service Overview.

Change Management Workflow (Approvers)

The flowchart below represents the Track-It! Technicians and Approvers' workflow for Change Management.

1. Select a topic from the interactive flowchart below to go directly to each topic.
2. Point to the item in the flowchart for a tooltip on where to perform the task in BMC Track-It!.
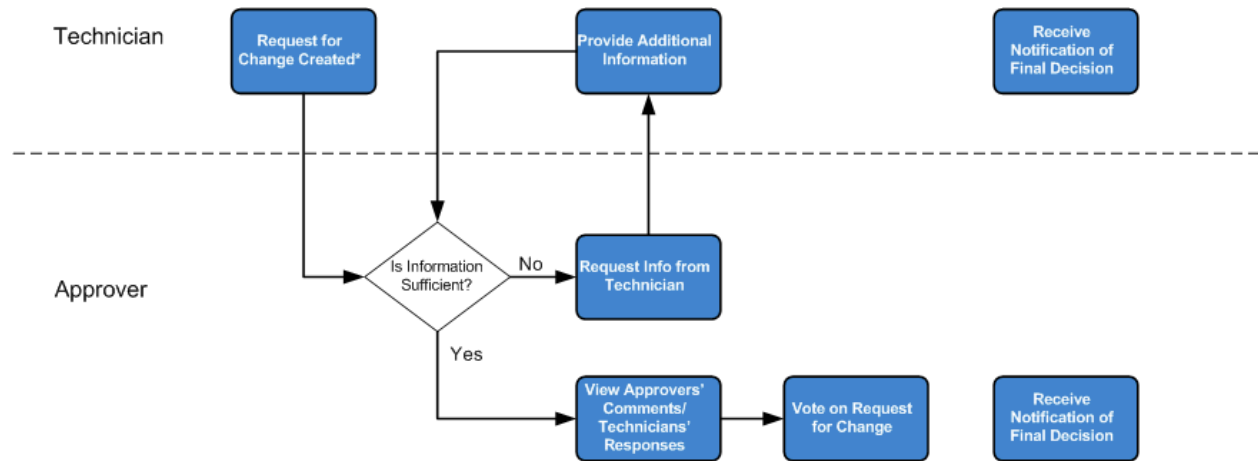
*Requests for Change can be created in two ways:
1) automatically when Work Orders are created that match Change Management policies, or
2) manually created by the Technician

Managing Requests for Change (Approvers)

You can manage your Requests for Change using BMC Track-It! Self Service. From here, you can view details about the RFCs, request information from the Assigned Technician, and vote to approve or reject the RFC. (A Request for Change is considered approved when all Approvers have approved, based on the number of approvals required.)

To access Self Service, see BMC Track-It! Self Service Overview.

To View Your Requests for Change:

1. Click the **View My Requests for Change** link on the **Home** page, or click the **My Requests for Change** link on the left pane of the **Self Service Center** to display a list of your open Requests for Change.
   The **Closed Requests for Change** tab lists the Requests for Change for which you've already voted. The **All Requests for Change** tab lists all of your Requests for Change.
2. Click the link of the **Request for Change** for which you want to review or vote.
   The **View Request for Change** page displays the details, including the following:
   - Status
   - Approvals Required
   - Decision Due Date
   - Instructions
   - Work Order ID
   - Work Order Summary
   - List of Approvers and [Approval] Status
   - Comments (yours as well as other Approvers)
3. To view the associated Work Order, click the **View Details** button.
   You can print the Work Order details by clicking the **Print Work Order** button.

To Request Information from the Assigned Technician:

Note: Once you've approved or rejected a RFC, you can no longer send comments.

1. Scroll down and enter a comment in the **Comment/Request** text box.
   Comments are required in order to request more information and to reject a Request for Change.
2. Click the **Request More Information** button.

3. Click the **OK** button on the confirmation message that displays that your request has been submitted.
The Technician's response will display on the **My Comments** and **All Approver Comments** tabs once a response has been made.
Note: Once you've approved or rejected a RFC, you can no longer send comments.

To Vote on the Request for Change:

Important Note: Once you've voted, you cannot change your vote.

1. To approve the RFC, click the **Approve** button.
2. To reject the RFC, enter a comment, then click the **Reject** button.
Comments for rejections are required.
3. Click the **OK** button on the confirmation message that displays that your rejection has been submitted.

Once you've voted, the RFC will display on the **Closed Requests for Change** tab.

Index