BMC Track-It!

Technician's Guide

Version 11

www.bmc.com

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Welcome to BMC Track-It! 11 Technician Client

Notes:

- For help with online help and printed documentation, see Online Help and Guides (PDFs).
- The topics in the online help are also available in the printed versions (PDF) on the Product Documentation section of our Support Web page

BMC Track-It! Technician Client is a fully-integrated help desk and asset management solution designed for small to medium-sized businesses. BMC Track-It! enables specialized technicians to apply best practices and proactive management techniques for delivering advanced Help Desk and Asset Management services to the organization. BMC Track-It! delivers the automation and integrated tools necessary to cost-effectively manage IT assets and deliver superior end-user support.

For more information, please see the BMC Track-It! Overview (PDF).

BMC Track-It! 11 Technician's Guide

Getting Help, Support, and Training

User Assistance (Online Help and Guides)

Note: The topics in the online help are also available in the following printed versions (PDF) on the Product Documentation section of our Support Web page at http://support.numarasoftware.com/support/updates.asp?product=2&content=Documentation&version=11&Offering=2&lang=EN

Product Documentation (PDFs)

- BMC Track-It! Administrator's Guide
- BMC Track-It! Technician's Guide
- BMC Track-It! Self Service Guide (for end users)
- BMC Track-It! Web Technician's Guide
- BMC Track-It! Mobile Web Technician's Guide
- System Requirements
- FAQs
- BMC Track-It! Installation Guide
- BMC Track-It! Bar Code Installation Guide
- BMC Remote Control 9.5 User's Guide
- Evaluation Guide

Note: If you are in a location where an internet connection is unavailable, you can install the BMC Track-It! help files (FlashHelp) on a local IIS server. See Installing Offline Help.

Track-It's online help system uses WebHelp, a Web-based help format. When you access a help topic in the BMC Track-It! application, either from the Help menu or from Help buttons, the help topics are delivered from the BMC Track-It! Web server to your Web browser (such as Internet Explorer). BMC Track-It! Mobile Web uses a mobile WebHelp, specially formatted for mobile screens.
To Use the BMC Track-It! Online Help:

1. Press the **F1** key, or select **BMC Track-It! Help** from the **Help** menu on Track-It's main menu bar.
   The **Help** dialog displays.
2. Enter your search terms in the **Search for:** text box, then click the **Search** button.

   Track-It's search engine searches not only the online help topics, but the KnowledgeBase on the BMC Track-It! Support Web page.

   Help topics are comprised of:

   - Overviews
   - Workflows
   - Getting up and running checklists
   - Procedural steps

   KnowledgeBase articles consist of:

   - Troubleshooting
   - Technical information
   - Specific how-to information based on customer requests
   - Online tutorials (videos)

The matching Help topics (indicated by a round, blue icon) and KnowledgeBase articles (displayed by a square white icon) display on the **Search Results** pane.

3. Select a Help topic or KnowledgeBase article from the list.

    - To view the entire online help (FlashHelp), drag the Help dialog to the left or right until you can see the FlashHelp dialog (indicated by a blue toolbar).
    - KnowledgeBase articles from our Support page at www.numarasoftware.com/support.asp.

Customer Support and Resources

For information on BMC Software Maintenance and Support, please see our Web page at www.numarasoftware.com/support.asp.

For customers who have purchased a maintenance and support plan, you can log in to your account at www.numarasoftware.com/support/MySupport.asp. From there you can:

- Submit a request (eSubmission)
- Submit an incident against a known problem
- Request an enhancement to the product
- View enhancements previously submitted
- View the status of your submitted incident numbers
- Sign up for Webinars (live online training) to get up and running with BMC Track-It!
- View your recent KnowledgeBase searches and recently-viewed articles
- View new product documentation
- Exchange files with the technical support department

Accessing the BMC Software Support Web Page

In order to access the KnowledgeBase articles, user guide PDFs, and other documents on our Support Web page, a Support profile is required. Our Support Web site can only be accessed by customers who have created a support profile. You will need at least one product serial number for a BMC Software product you own. If you do not know your product serial number, you can find it in Help > About in BMC Track-It!.

To set up your Support profile:

1. Go to http://support.numarasoftware.com/support/login.asp.
2. Enter your **user name** and **password**, or click the **"Create a Support Profile" l**ink to create a new profile.
3. After logging in, select the **Profile** tab.
4. Verify that the **"Yes, remember my account information"** option is enabled.

Installing the BMC Track-It! Technician Client

Your BMC Track-It! Administrator can send an e-mail to you and other BMC Track-It! technicians with a hyperlink to install BMC Track-It! on your computers.

To Install the BMC Track-It! Technician Client:

1. Click the **link** on the e-mail sent from your BMC Track-It! Administrator.
   (The link may look similar to this: Click Once: \Track-It!ServerName\TechnicianClient\ClickOnce\publish.htm).
2. Click the **Install** button when the Web page displays "BMC Software, Inc. Track-It! *x*".
3. If you receive an internet security warning message to run or save the setup.exe file, click the **Run** button.
4. If you receive a Web browser (e.g. Internet explorer) security warning that "the publisher could not be verified", click the **Run** button.
5. If you receive an additional security warning that the publisher cannot be verified, click the **Install** button.

   The **Launching Application** dialog displays, then the **Installing BMC Track-It! *x* Technician Client** dialog displays with a status bar. You can continue using your computer for other tasks during the installation.

   In a few minutes, BMC Track-It! is installed and displays the login screen.

6. Enter your **User name** and **Password**, then click the **Login** button.

Exploring and Customizing the BMC Track-It! Workspace

Keyboard Shortcuts

You can use keyboard shortcuts for commands (such as File, Edit, View, Window, and Print) so that you can move through the application without using your mouse.
To Use Keyboard Shortcuts:

1. To use a shortcut key, press and hold the **ALT** key while pressing the shortcut key (such as ALT+E for Edit).
2. To view which keys have assigned shortcuts (access keys), press the **ALT** key while in any window. The commands will display with underlined shortcut keys.

See also: Using Keyboard Shortcuts for Work Orders, Adding Descriptions and Technician Notes to Work Orders, and Documenting Work Order Resolutions.

Searching for Information in BMC Track-It!

The BMC Track-It! search engine supports full-text search capabilities. You can search from the main toolbar of each module's window for text in database fields related to the following categories:

- Assets
- Departments
- Library Items
- Locations

- Purchases
- Software Titles
- Solutions
- Technicians
- Users
- Work Orders

Note: The **Search Requestor** dialog accessed from the **Requestor** field on a Work Order automatically uses a wild card search to display all records. See Searching for the Requestor's Name and Viewing User Information for a Work Order.

To Search for Information in BMC Track-It!

1. Enter any part of the search term in the **Search** field on Track-It's main toolbar, then click the **Search (Department, Asset, etc.)** button.

   (The **Search** button displays the category of the last search, such as **Search Asset** or **Search User**. To select another search criteria, select an option from the **Search** button's drop-down list.

   The **Search** dialog opens and displays the search results. To customize the grid view, see Showing and Hiding Columns in Creating User-defined Views.

Boolean Searches

You can use the following Boolean search criteria:

Boolean Search Example	Search Results
password **and** reset	Help topic or support article includes both words
password **or** reset	Help topic or support article includes either word
password **w/5** reset	First word occurs within 5 words of second word in Help topic or support article
password **not w/5** reset	First word occurs, but not within 5 words of second word in Help topic or support article
password **and not** reset	First word, but not second word, occurs in Help topic or support article
(password or reset**) and** open	First word or second word and third word occur in Help topic or support article
* or ?	Returns all records

Working with Multiple Modules at a Time

You can work with multiple modules at a time in BMC Track-It!, such as the Help Desk and Inventory modules.

Note: You can open multiple windows (Help Desk, Inventory, Training), but you won't be able to open additional windows if a dialog is open in one of them. This includes the **Administration Console** and the **Configuration Wizard**.

To Open Multiple Windows:

1. Select **New Window** from the **Window** menu on the **main menu bar**.
2. Select the module you would like to view.
3. To toggle between windows, press the **ALT Tab** keys, or select the BMC Track-It! window from the **Windows task bar** at the bottom of the screen.
4. To view multiple windows at a time, right click the BMC Track-It! window from the **Windows task bar**, then right click and select **Tile Horizontally** or **Tile Vertically**.
5. To close individual windows, select the BMC Track-It! window from the **Windows task bar**, then right click and select **Close**.

Viewing and Printing Information in Grids

Viewing Information in Grids

Note: You can create up to 30 custom views.

BMC Track-It! displays records such as assets in the Inventory module and work orders in the Help Desk module in *grids*. The grids consist of tables with columns and rows. Each row represents a record and each column represents a field. For example, when you view the Inventory grid, the default view displays a list of All Assets by Asset Type, with columns that include Asset ID, Asset Name, Asset Department, etc.

You can manage the way information is displayed in grids by using system views, user-defined views, sorting, grouping, filtering, and customizing records in grids.

Note: BMC Track-It! will automatically refresh the grid to display current records. However, you can manually refresh the grid. Right click the grid and select **Refresh**, or press the **F5** key.

System Views

BMC Track-It! provides several system views -- for example: All Assets, All Computers, All Audited Assets, and All Network Assets. System views cannot be modified or deleted, but you can use them to create and save custom views.

To View Records Using System Views:

1. Select **System Views** from the **Current View** menu at the top of the grid (or from the **View** menu in the **Main Menu Bar**), then select a **System View** (such as All Assets in the Inventory grid). The name of the Current View displays after you have selected the view, and the records display in the grid.

Previewing Records in a Grid

You can customize the grid view so that you can preview a record while viewing the remaining list of records in the grid.

To Preview Records in a Grid:

1. Right click any column header and select **Preview**.
2. Select whether to view the preview pane on the bottom, top, left, or right of the grid. Select None to hide the preview pane.

To View Columns:

1. Drag the horizontal scroll bar to view all the columns. To show or hide columns, see Creating Custom Views.
2. To adjust the width of a column, drag the edge of the column heading to the left or right. To adjust the column width to fit the contents, select the column and double-click the right edge of the selected column heading.

To Search for Records in a Grid:

1. Enter the search term in the Search field (main toolbar), then click the **Search** button.
   The **Search** button displays the name of the last search, such as **Search Asset**, or **Search User**. To select another Search criteria, select an option from the **Search** button's drop-down list. The **Search** dialog opens and displays the search results.

To View Record Details:

1. Select the record in the **Results** grid, then click the **Open** button.

Next Topic: Sorting, Filtering, and Grouping Records

Sorting, Filtering, and Grouping Records

Sorting Records

You can sort records alphabetically in grids (such as by Asset Type in the Inventory module or by Work Order Number in the Help Desk module).

To Sort Records

1. Click the column header (the name at the top of the column) to sort by ascending or descending order.
2. To return to the default sort order, right click the column header and select **Clear Sorting**.

Filtering Records

After you've selected a grid view from the **Views** menu, you can filter records based on your criteria so that you can select only the rows you'd like to display. For example, in the Inventory grid, you might only want to view assets by Asset Type or User Name.

When filtering records in a grid, the Auto Filter lists display the number of records equal to the maximum records allowed in the associated grid view.

With the Auto Filter, rows can be filtered and displayed that meet conditions per column, by filter order. For example: If you filter first on Location: ”Tampa”, then on Department "Engineering”, then on Users, you will only see Users who have a Location ”Tampa” and Department ”Engineering”.

Once you've filtered a view, you can save it as a user-defined View (see Creating Custom Views).

To Filter Records:

1. Enter the search term in the **Auto Filter Row** (blank row beneath the column header) and press **Enter**.
   The default search comparison type is "LIKE", so if you enter "phone" in the Summary column in the Help Desk grid, all records with the Summary containing the term "phone" will display.
   You can filter multiple columns. The filtered rows display.
   OR
   Select the drop-down arrow on the column header, then select a field from the list (such as a User Name in the User Name column). The filtered rows display. You can also select:
   - All
   - Custom: see Custom Filters, below
   - Blanks
   - Non blanks

To Remove a Filter:

1. Select **Abandon Changes to Current View** from the **View** drop-down list.
   This returns the grid to the default system view, or to the last saved custom view.

To Filter Records with the Custom Filter:

1. Select **Custom** from the column header drop-down list.
   The **Filter** dialog displays with the column name (field name), such as User Name, beneath "Show records where".
2. Select a comparison type from the top left drop-down list (such as "equals" or "like" -- see the table below for a complete list).

3. Enter or select a comparison value from the **value** (top middle) drop-down list (such as the user's first name).
4. If you want to set additional conditions, repeat steps 2 and 3, then click the **and/or** button, and select "and" or "or" from the drop-down list.
   You can continue step 4 to filter on multiple conditions.
5. Click the **Accept** button to save the custom filter.
   The grid displays only the records that meet the condition(s) of your filter.

Custom Filter Operators		
Comparison Type	**Description**	**Example**
equals	Field value equals filter criteria	[Summary] = 'printer keeps jamming'
does not equal	Field value does not equal filter criteria	[Location] < > 'Tampa'
is greater than	Field value is greater than filter criteria	[Hours] > '3'
is greater than or equal to	Field value is greater than or equal to filter criteria	[Charge] >= '10'
is less than	Field value is less than filter criteria	[Due Date] < Today
is less than or equal to	Field value less than or equal to filter criteria	[Hours] <= '5'
blanks	Field value is blank	[Expected Completion Date] Is Null
non blanks	Field value is not blank	[Priority] Is Not Null
like (see below for more options)	Field value is like	[Summary] Like 'employee%'
not like	Field value is not like	Not [Requestor] Like 'Mike"

Note: You can also narrow the filter using wildcards with the "like" comparison type. For example:

Comparison Type: Like		
Wildcard Character	**Description**	**Example**
_ (underscore)	Any single character ending with...	[Computer Name] Like '_05'
[ ]	Any single character within the specified range	[Priority] Like '{1-2]'

To Clear the Custom Filter:

1. From the grid, click the **Close** button (X) at the bottom of the grid next to the filter criteria.
   OR
2. Right click the column header for the specific column, and select **Clear Filter**.
   OR
3. From the **Filter** dialog, click the **Delete** button(s) for the filter row.

Grouping Records

You can group records in a grid by column.
To Group Records:
In this example, we'll open the All Printers system view in the Inventory module and group the printers by Location.

1. Drag the column header (in this example -- Printer Location) into the blank area above the column headers.
   The records display grouped by the field name.

2. Click the **+** button next to the field name (such as Printer Name) to expand the list. Click the **--** button to collapse the list.
3. To group by more columns, repeat step 1 (for example, you could add the field "Color" to find color printers).
4. To remove the groups, drag the column name back to the grid, or right click the column header and select **Clear Grouping**.

Printing Grid Contents

You can print the contents of a grid. The printed data will display the current grid view (as grouped, sorted, filtered, etc.).

To Print Grid Contents:

1. Right click the grid and select **Print Grid Contents**.
2. Click the **Print Direct** icon, which will print the grid directly to your printer, **OR**
3. Click the **Print** icon on the **Preview** dialog toolbar.
4. Select options from the Windows **Print** dialog, then click the **Print** button.

To Customize the Printed Grid:

1. Click the various icons on the **Preview** dialog toolbar, such as Background and Watermark, and select settings, **OR**
2. Click the **Customize** icon on the **Preview** dialog toolbar.
3. On the **Printable Component Editor**, select your settings, then click the **OK** button.

See Also: Exporting Grid Contents

Exporting Grid Contents

You can export data from a grid to three file formats: text (.txt), Microsoft™ Excel (.xls), and Web (.html) so that you can share the information, use it in reports, etc. The exported data will display in the current grid view (as grouped, sorted, filtered, etc.).

To Export Grid Contents:

1. Right click the grid and select **Export Grid Contents**, **OR**
   With the grid displayed, **Export Grid Contents** from the **Current View** menu at the top of the grid.
2. In the **Export Grid Contents...**dialog, navigate to the drive or folder where you want to create the file.
3. Enter a name for the file in the **File Name** text box.
4. Select the file format from the **Save as Type** drop-down list, then click the **Save** button.
   The exported grid in Excel or Web format will display as a table with a shaded header row.

Customizing and Managing Grid Views

Managing Grid Views (Renaming, Deleting, and Copying)

From the **Manage Views** dialog, you can view and manage grid views (System, Public, and User-defined Views).

You can rename, delete, copy, publish User-defined Views as Public Views, and export and import views from other Technicians.

Notes:

- Your BMC Track-It! Administrator grants permissions to Technicians to add, edit, and delete Public grid views. See Restricting Privileges by Module in the Administrator's Guide.
- You can create up to 30 user-defined views.

Viewing the List of Grid Views:

1. At the topic of a grid (such as in the Help Desk or Inventory modules), select **Manage Views** from the **Current View** menu.

   The **Manage Views** dialog displays the view names and types. System Views are indicated by a globe/lock icon (since they cannot be modified), and Public Views are indicated by a globe icon. You can sort the views by clicking the column headers.

Renaming Views

Note: You cannot rename a system view.
To Rename a User-defined View:

1. In the **Manage Views** dialog, select the user-defined view you want to rename, and click the **Rename** button.
2. Enter the new name for the view in the **View Name** textbox (in the **Save Current View As**...dialog), then click the **Save** button.
3. Click the **Close** button to return to the grid.

Deleting Views

Note: You cannot delete a system view.
To Delete a View:

1. In the **Manage Views** dialog, select the view you want to delete, and click the **Delete** button.
2. Click **Yes** when the confirmation dialog displays.

Copying Views

You can copy system views and user-defined views as a basis for a new user-defined view.
To Copy a View:

1. In the **Manage Views** dialog, select the view you want to copy, and click the **Copy** button.
2. Click **Yes** when the confirmation dialog displays.

See also:

Creating User-defined Grid Views
Creating Public Grid Views
Exporting and Importing Views

Creating User-defined Grid Views

You can create user-defined views of information in grids with the **Customize Grid** feature. Once you customize the grid, you can save it as a User-defined (Private View) and a Public View.

Note: You can create up to 30 user-defined views.

To Create a User-defined View:

The following shows how to create a user-defined view from a System View. Once you create a user-defined view, you can create additional user-defined views from it, as well as from System Views. In this example, we will create a user-defined view of All Computers grouped by Department. Then we'll save the custom view so that we can access it later.

Showing and Hiding Columns

1. Select **System Views** from the **Current View** menu at the top of the grid, then select a System View (such as All Computers).
   The name of the Current View (All Computers) displays after you have selected the view, and the records display in the grid.
2. Sort, filter, and/or group the information in the grid. In this example, since we used the All Computers System View, the grid view is grouped by Asset Type and Asset Department. (See also Sorting, Filtering, and Grouping Records).
3. To customize which columns to display, right click anywhere on the grid, then select **Customize**.
4. In the **Customize Grid** dialog (**Columns** pane), select the columns you want to display from the left pane, then click the **Add** button.
   You can select several columns at once. Press and hold the **Ctrl** key while you select the columns. To select columns in a continuous list, press and hold the **Shift** key while selecting them.
5. Select any columns you want to remove, and click the **Remove** button.
   This only removes the columns from the view -- it does not delete them from the database.
6. To arrange the columns, select the column from the right pane, then click the **Move Up** or **Move Down** buttons.
   You can also move columns by selecting the column header in the grid, and dragging them from left to right.

Saving Custom Views

1. Once you've created your custom view, select **Save Current View As** from the **Current View** menu.
2. Enter the custom view name in the **View Name** text box on the **Save Current View As...**dialog.
3. Select **Private- View is available only to me** from the **View Type** drop-down list.
4. Click the **Save** button.
   The user-defined view name displays on the **Current View** menu.
   To view or make changes to grid views, see Managing Grid Views (Renaming, Deleting, and Copying)

Highlighting Records with Conditional Formatting

You can set up conditional formatting so that column values are highlighted when they meet your criteria. In this example, we'll highlight all work orders with a Priority of "Critical".

To Create a Format Rule:

1. Right click anywhere on the grid (such as the Work Order grid in the Help Desk module), then select **Customize**.
2. From the **Customize Grid** dialog, select the **Format** tab.
3. Click the **Add** button to set up a conditional formatting Rule.
4. On the **Format Rule** dialog, enter a name for the Rule in the **Rule Name** field (required).
   In this example, we'll enter "Critical Work Orders".
5. Select a field from the **Column** drop-down list (required).
   We'll select "Priority".
6. Select a comparison type from the drop-down list beneath **Criteria** (such as "Equal, or GreaterOrEqual).
   We'll select "Equal".

Note: You can also use the comparison "Between" or "Not Between", such as in "Between Last Week and Today" (with Date Entered or other fields).

7. Enter or select a comparison value from the value (top middle) drop down list (such as "Critical" for the "Priority" field).
8. Beneath **Cell Display**, select a color for the highlighted value from the **Text Color** drop-down list. You can select colors from the **Custom**, **Web**, or **System** tabs. A sample of the formatting displays in the **Sample Cell** field.
9. If you want to format the font style (such as "Bold"), select a style from the **Text Style** drop-down list
10. If you want to format the cell background, select a color from the **Cell Color** drop-down list.
11. To apply the same formatting to the entire row, select the **Apply to Row** checkbox.
12. Click the **OK** button to save the Format Rule.

Grid Preferences

On the **Preferences** tab of the **Customize Grid** dialog, you can show or hide the **Group By** box, **Auto Filter** row, and **Indicator** column. You can also specify the **number of records** (rows) to display, and set the grid to **automatically refresh**.

1. To show or hide the **Group By** box, check the designated check box beneath **Visual**, **OR** right click the column header and select **Group By Box**.
   This displays or hides the area above the column headers where you can drag the column names in order to group them.
2. To show or hide the **Auto Filter** row, check the designated check box, **OR** right click the column header and select **Auto Filter Row**.
   (See also Sorting, Filtering, and Grouping Records).
3. To show or hide the **Indicator** column, check the designated check box.
   This adds a column to the left of the grid with an arrow indicating the selected row.
4. By default, up to 5,000 records are displayed in a grid. To specify the number of rows (records) to display, select an option from the Max. Row Mode: drop-down list below **Data** (such as Custom). Then enter or select the number of rows to display from the **Max. Rows:** drop-down list.
5. To set the grid to automatically refresh, click the **Automatically Refresh Grid** checkbox, then select or enter the time interval to refresh the grid in the **Minutes** field.
6. Click the **OK** button to save the settings.

See also: Creating Public Grid Views

Creating Public Grid Views

You can customize grid views and make them available to all technicians by saving or publishing them as Public Views.

Notes:

- Your BMC Track-It! Administrator grants permissions to Technicians to add, edit, and delete Public grid views. See Restricting Privileges by Module in the Administrator's Guide.
- You can create up to 99 Public Grid Views.

To Create Public Grid Views:

1. Create a view as described in the previous topic Creating User-defined Grid Views.
2. Once you've created your view, select **Save Current View As** from the **Current View** menu.
3. Enter the view name in the **View Name** text box on the **Save Current View As...**dialog.
4. Select **Public - View is available to all Technicians** from the **View Type** drop-down list.
5. Click the **Save** button.
   The Public View name displays in the **Public Views** drop-down list on the **Current View** menu.

You can also publish your user-defined views as Public Views from the **Manage Views** dialog.

To Publish User-defined views as Public Views

1. Select **Manage Views** from the **Current View** menu , then select a user-defined view.
2. Click the **Publish** button.

See also: Renaming, Deleting, and Copying Views

Exporting and Importing Views

Exporting Views

You can export User-defined Views so that you can share them with other BMC Track-It! users. When you export a view, the view is saved as an .xml file to the directory you specify (such as your hard drive or a network drive). The .xml file name will display the name of your file (such as My Work Orders by Priority.xml. Then other users can import your User-defined View into BMC Track-It!.

Important: When other users import the views, they will only be able to see the information available based on their security privileges.

Note: You can also create Public Grid Views that all technicians can view without having to export and import. See Creating Public Grid Views

To Export a User-defined View:

1. In the **Manage Views** dialog, select the view you want to export, and click the **Export** button.
2. In the **Export View** dialog, navigate to the drive or folder where you want to save the view. The **File Name** defaults to the name of your view, and the **Save as Type** defaults to "View Files".
3. Click the **Save** button on the **Export View** dialog. The grid view file will display in your selected drive or folder. Now other users can import the file into BMC Track-It! (See below).

Importing Views

To Import a User-defined View:

1. In the **Manage Views** dialog, select the view you want to export, and click the **Import** button.
2. In the **Import View...** dialog, navigate to the drive or folder of the view file, then click the **Open** button.
3. If the view name already exists, a message will display asking you if you want to import the view under a new name. To change the name, click the **Yes** button. On the **Save Current View As** dialog, enter the new name, then click the **Save** button.
4. The imported view name displays in the **Current View** drop-down list.

Customizing the BMC Track-It! Workspace

Customizing Your Home Page (Dashboard Graphs, Asset Summary, and Announcements)

The BMC Track-It! Home Page displays:

- Two Help Desk graphs (If your BMC Track-It! Administrator has given you permission to access the **Dashboard** module)
- Asset Summary counts, such as the number of New Discovered Assets (with links to the **Asset Reconciliation - Discovery** and **Asset Reconciliation - Bar Code** windows
- Announcements (for Technicians or Technicians/Users)

To View Your Home Page:

1. Select **Home Page** from the **Navigation Pane**.

To View Different Dashboard Charts:

1. Click the **Change View** link at the top of the chart, then select a graph or pivot grid from the list. (You must have access to the **Dashboard** module to view the charts).

To Set Asset Summary Preferences:

1. Click the **Edit Preferences** link in the **Asset Summary** panel.
2. On the **Asset Summary Preferences** dialog, click the check box next to the information you want to display:
    - Discovered Assets - New
    - Discovered Assets - Missing
        - Those that have not been found in a scan during the selected period (the past Day, Week, or Month)
    - Bar Coded Assets - New
    - Bar Coded Assets - Missing
        - Those that have not been found in a scan during the selected period (the past Day, Week, or Month)
    - Audited Assets
    - Assets Audited for the first time
3. Click the **Save** button.

See Also: [Creating Announcements]

Customizing Your Home Page (Dashboard Graphs, Asset Summary, and Announcements)

The BMC Track-It! Home Page displays:

- Two Help Desk graphs (If your BMC Track-It! Administrator has given you permission to access the **Dashboard** module)
- Asset Summary counts, such as the number of New Discovered Assets (with links to the **Asset Reconciliation - Discovery** and **Asset Reconciliation - Bar Code** windows
- Announcements (for Technicians or Technicians/Users)

To View Your Home Page:

1. Select **Home Page** from the **Navigation Pane**.

To View Different Dashboard Charts:

1. Click the **Change View** link at the top of the chart, then select a graph or pivot grid from the list. (You must have access to the **Dashboard** module to view the charts).

To Set Asset Summary Preferences:

1. Click the **Edit Preferences** link in the **Asset Summary** panel.
2. On the **Asset Summary Preferences** dialog, click the check box next to the information you want to display:
    - Discovered Assets - New
    - Discovered Assets - Missing
        - Those that have not been found in a scan during the selected period (the past Day, Week, or Month)
    - Bar Coded Assets - New
    - Bar Coded Assets - Missing

        - Those that have not been found in a scan during the selected period (the past Day, Week, or Month)
    - Audited Assets
    - Assets Audited for the first time

3. Click the **Save** button.

See Also: Creating Announcements

Setting User Preferences (Language, Start-up Module, and Password)

You can select the language displayed in BMC Track-It!. The application is available in several different languages (English, French, German, Portuguese, and Spanish). You can also set the module that will display each time you start BMC Track-It! (such as Home Page, Dashboard, Help Desk, or Inventory). Finally, you can set a user password which will be required when BMC Track-It! is used on your computer.

To Set User Preferences:

1. Click **Tools/ Preferences** from the main menu.
2. To run BMC Track-It! in a different language, select it from the **Language** drop-down list. You can click the **Use Default** button to run BMC Track-It! in English.
3. To display a specific module when BMC Track-It! is started, select a module from the **Start-up Module** drop-down list.
4. To require a **Password** when BMC Track-It! run, enter the password in the **Password** field, then enter it again in the **Confirm Password** field.
5. Click the **Save** button.

See also: Setting the Default Language in the Administrator's Guide.

Customizing Toolbars and Creating Toolbar Buttons

Technicians can customize toolbars and create toolbar buttons for BMC Track-It! modules and detail windows (such as the Work Order and Asset detail windows). Administrators can also globally customize the Help Desk module and Work Order detail toolbars so that all Technicians can use specific toolbar buttons. Toolbar buttons can be associated with batch or executable files, as well as URLs. For example, you can link the button to the BMC Track-It! Technician's Guide (PDF) on our Support Web page.

To Show or Hide a Toolbar:

1. Select the module for the toolbar you want to customize.
2. Right click anywhere on the toolbar and select or deselect the toolbar's name (such as Standard, Search, or Global).

To Customize a Toolbar:

1. Select the toolbar you want to customize.
2. Right click anywhere on the toolbar and select **Customize**.
3. On the **Customize Toolbar** dialog, select an item from the **Available Toolbar Items** list, then click the **Add** button to place it in the **Current Toolbar Items** list.
4. Click the **Move Up** or **Move Down** buttons to move the toolbar buttons to the left or right on the toolbar.
5. To remove a toolbar item from the toolbar, select the item from the **Current Toolbar Items** list, then click the **Remove** button.

6. When you're finished customizing the toolbar, click the **Accept** button.

Note: You can only edit customized buttons (see below).
To Create a Toolbar Button:

1. Select the module for the toolbar you want to customize.
2. Right click anywhere on the toolbar and select **Customize**.
3. On the **Customize Toolbar** dialog, select a toolbar (**Standard** or **Global**), then click the **New** button.
   Notes: Only Technicians with BMC Track-It! Administrator rights can customize global toolbars. Also, the Help Desk and Work Order global toolbars are independent of each other. If you want to add the same customized button, you will need to add it separately for both toolbars.
4. On the **Customize Toolbar Button** dialog, enter a name for the toolbar button in the **Name** field.
5. Enter descriptive text for the toolbar button in the **Tooltip** field.
   This will be displayed when Technicians mouse over the button.
6. Click the checkbox below the Tooltip textbox to display the Tooltip text with the tooltip's icon.
7. Click the **Select** button under **Display Icon** to define the button's icon.
   Note: If you select an application in the next step, the associated icon will automatically display. If you don't select an application, select a file type of .ico (16 x 16 pixels) for best results.
8. Click the **Ellipses** (...) button next to the **Path** text box to enter a URL, file path, or to select an executable or batch file.
9. Optional: You can enter parameters in the **Parameters** text box, or click the **Add Parameter** button to select them.
   The list of parameters are BMC Track-It! database fields, and are available for the Inventory and Help Desk toolbars so that you can use them with batch or executable files.
10. Click the **Save** button on the **Customize Toolbar Button** dialog.
11. To edit the button, select it, then click the **Edit** button. When finished, click the **Accept** button on the **Customize Toolbar** dialog.
    The new buttons now display on the toolbar.

Customizing a Module's Tab Displays

Customizing Tab Displays

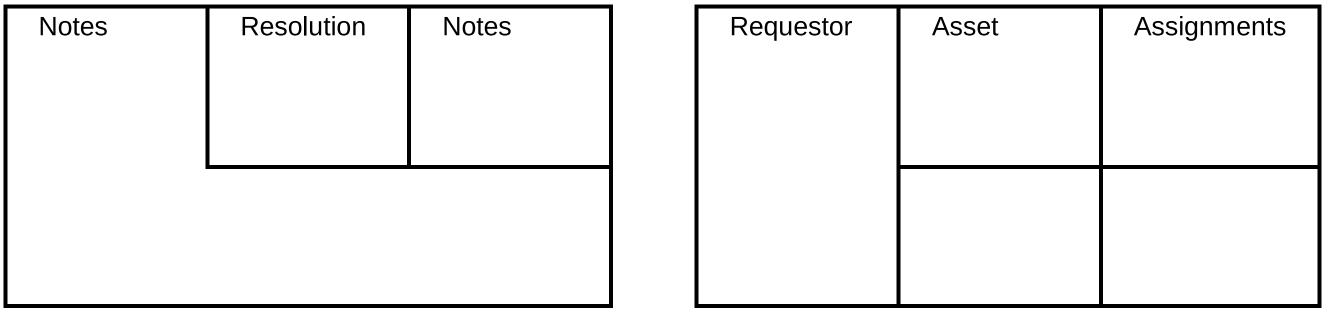
Many of the windows in BMC Track-It! display information using tabs, such as the Asset, Software Title, and Work Order* windows. The header pane at the top of the window displays basic information and the tabs display the details. The tab area of the window can display two full tabs at a time, like an open book. You can customize which tabs display and in what order.

For example, the Work Order window displays basic information in the header pane, such as the Requestor and Summary. The additional tabs display detailed information:

- Notes
- Resolution
- Additional Custom Fields
- Classification and Schedule
- Requestor
- Asset
- Assignments
- Change Management

- Attachments
- Audit Trail

You can arrange the tabs so that only certain tabs are displayed, as in the example below. You can rearrange the tab order by dragging and dropping the tabs.



Work Order Window: Tabs

*__Note__: In addition to customizing tabs, you can save tab layouts for Work Orders. See Saving Tab Layouts for Work Orders

To Customize the Tab Display:

1. Right click on any of the tabs (such as Classification and Schedule) on either the left or right tab pane.
2. Select the tabs you want to display from the list in the context menu.
3. To view all of the selected tabs, click the left and right arrow buttons at the top right of the tabs (these buttons display if more tabs are selected than can fit on the pane).
4. To rearrange the tab order, drag and drop the tabs.

   (The order can be changed per panel.)

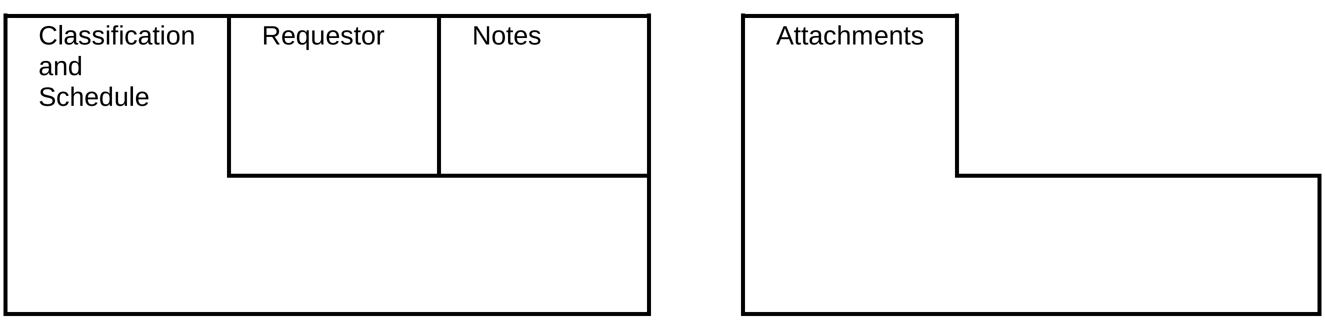
5. Save and close the window.

   The new tab layout will persist when the window is reopened, except for Work Order tabs, which have specific functionality (see Saving Tab Layouts for Work Orders).

Saving Tab Layouts for Work Orders

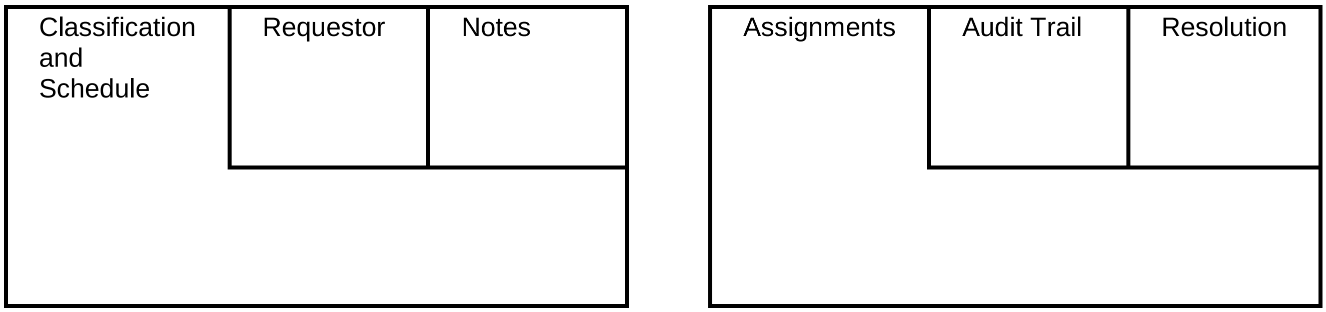
In addition to customizing tab displays, you can arrange and save tab layouts for new and existing Work Orders and Assignments. Once you save the tab layouts, when you create a new Work Order or Assignment, the tabs will display according to your settings.

For example, you might want to arrange the tabs for new Work Orders with the following tabs:



Example: Tab Layout for New Work Orders

You could arrange existing Work Orders to include the Assignments, Resolution, and Audit Trail tabs on the right pane.



Example: Tab Layout for Existing Work Orders

To Save Tab Layouts for Work Orders:

1. Arrange the tabs on the left and right pane (see the previous topic Customizing Tab Displays).
2. From the **Tab Layout** button on the menu bar, select any of the following options:

   - Save as New Work Order
   - Save as New Assignment
   - Save as Edit Work Order
   - Save as Edit Assignment

   Depending on the layout you saved above, the new tab layout will persist when the window is reopened.

Inventory: Managing IT Assets

Managing IT Assets Overview

With the BMC Track-It! Inventory module, you can manage your company's assets, which includes discovering assets by scanning the network, placing the assets in inventory, and auditing the network for changes. (These processes are explained in detail in related multimedia tutorials on Managing IT Assets.) You can also manage non-networked assets by manually adding assets, or by scanning them with the Bar Code solution. The Inventory process is comprised of:

- **Asset Discovery**
  When the Asset Discovery process runs, Track-It scans the network and captures information about workstations and devices.

- **Managing Discovered Assets**
  Once the assets are discovered, you can manage them, such as deciding whether or not to track them in inventory.

- **Auditing Assets**
  If you decide to track the discovered assets, Track-It continually audits the network and updates inventory information regarding those assets.

- **Bar Code Solution**
  The Bar Code solution is an add-on module enabling you to track your company's IT assets using bar codes. This facilitates increased productivity by expediting data entry and reducing errors during physical audits.

- **Inventory Reports**

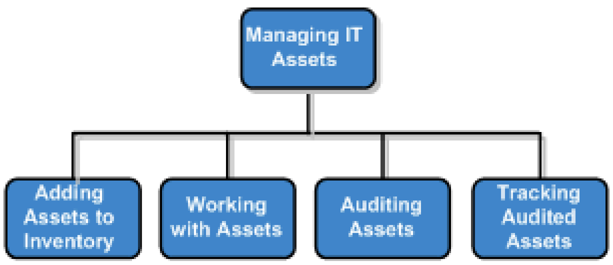
Using the BMC Track-It! Reports module, you can generate reports that list all of your organization's assets, including Assets by Serial Number, Installed Network Printers, and many more.

- **Integration with Purchasing and Help Desk Modules**
  The Inventory module is integrated with the Purchasing and Help Desk modules.

Next Topic: Managing IT Assets Workflow

Managing IT Assets Workflow

The flowchart below represents the tasks in the following topics.



Next Topic

Adding Assets to Inventory (Overview)

Adding Assets to Inventory

Adding Assets to Inventory (Overview)

There are several ways to add assets to Inventory in BMC Track-It!:

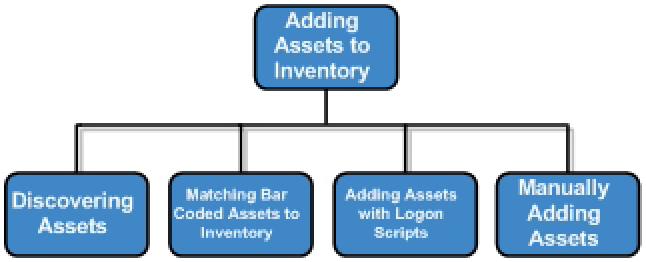
- The easiest method is the **Asset Discovery** process which automatically scans your network and discovers computers and other networked devices. Then you can select which assets to add to inventory.
- With the **Bar Code solution** (an add-on module) you can scan bar coded assets and add them to inventory.
- You can **audit your network** using logon scripts which finds computers added to the network.
- You can **manually add assets** (which might be useful for non-networked assets such as DVD players).

Next Topic

Adding Assets to Inventory (Workflow)

Adding Assets to Inventory (Workflow)

The flowchart below represents the tasks in the following topics.



Next Topic: Discovering Assets on Your Network (Overview)

Discovering Assets

Discovering Assets on Your Network

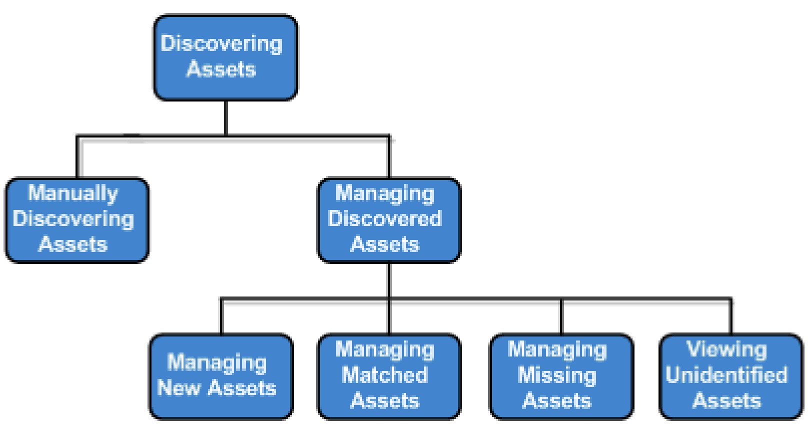
The Asset Discovery process discovers devices on the network by conducting a network scan. This includes workstations, switches, routers, printers and other networked devices. Typically your BMC Track-It! Administrator will set up BMC Track-It! to automatically discover assets at specified time intervals. However, you can also manually discover your assets.

Note: Your BMC Track-It! Administrator will need to initially set up the scan criteria to discover assets (see Specifying Scan Criteria to Discover Assets).

Next topic: Discovering Assets Workflow

Discovering Assets Workflow

The flowchart below represents the tasks in the following topics.



Next Topic: Manually Discovering Assets

Manually Discovering Assets

Typically most organizations will set up BMC Track-It! to automatically scan your network at specific time intervals to discover new assets. However you can manually scan for new assets at any time.

Note: Your BMC Track-It! Administrator schedules asset discoveries and can set up BMC Track-It! to automatically notify you when new assets are discovered. (See Scheduling Asset Discoveries and Notifying Technicians in the Administrator's Guide.)

To Manually Discover Assets:

1. From the **Inventory** module, select **Manage Discovered Assets** from the **Tools** menu on the main menu bar, **OR**

   Select **Discover Assets Now** from the **Options** button on the **Asset Reconciliation - Discovery** window.

   The dialog can also be accessed from the **Configuration Wizard** (Step 3 of 3: Discover Network Assets).

2. The **Asset Discovery Progress** dialog displays and the discovery process begins. When the network scan is complete, the number of new assets are displayed at the bottom of the dialog.

   The discovered assets are displayed on the **New** tab of the **Asset Reconciliation - Discovery** window.

3. Click the Expand (**+**) button to view the assets.

Once you discover your assets, you can manage and reconcile them.

Next Topic: Managing and Reconciling Discovered Assets

Managing Discovered Assets

Managing and Reconciling Discovered Assets

After BMC Track-It! discovers your assets, you can reconcile any differences between your current inventory and discovered assets on the **Asset Reconciliation - Discovery** window.

On the **Manage Discovered Assets** window, accessed from the **Tools** menu in the **Inventory** module, new assets that have not been previously discovered by BMC Track-It! are listed on the **New** tab. Discovered assets that match your current inventory (based on the MAC address) are displayed on the **Matched** tab, and any changes (such as computer name) are displayed. If any assets have been removed from your network, they will display on the **Missing** tab. If you decide not to track specific assets, you can move them to the "**Ignored**" list. Assets that do not have a MAC Address or Name are listed on the **Unidentified** tab.

The following table describes the discovered assets listed on each tab on the **Manage Discovered Assets** window. See the related topics in this chapter for detailed instructions.

Click the links below for detailed information.

Discovered Assets Tab	**Description**
New	New assets that do not match those already in inventory. You can add them to inventory, match them to an existing asset, skip, or ignore the asset in future scans.
Matched	Assets that match those in Inventory based on the MAC address or other criteria. You can accept the designation, skip, match each asset to another asset, or unlink the scan and asset.
Missing	Assets that have not been found in a scan during a specific period. You can skip them, ignore them, or remove them from inventory.
Ignored	Assets that have been manually moved to the list from new or missing assets. You can skip them or resume discovery updates.
Unidentified	Assets that do not have a MAC Address or Name (view only)

Next Topic: Managing New Assets (Discovery)

Managing New Assets (Discovery)

Assets that do not match those already in inventory are placed in the **New** list (on the **New** tab of the **Asset Reconciliation - Discovery** window). You can add them to inventory, match them to an existing asset, skip them, or ignore the assets in future scans.

The **Options** button on the window enables you to discover assets, configure discovery, and print a report.
To Manage New Assets:

1. To access the **Asset Reconciliation - Discovery** window, select **Manage Discovered Assets** from the **Tools** menu on the main menu bar (while in the **Inventory** module).

You can also access the window by the following: ▪ Select **Manage Discovered Assets** from the **Tasks** pane in the **Inventory** module, **OR** ▪ Select the **Manage Discovered Assets** icon from the **Tools** menu in the **Inventory module.**

2. Select the **New** tab on the **Asset Reconciliation - Discovery** window.
3. Click the Expand (+) button to view all the assets.
4. The list of assets is grouped by domain; however, you can click the **Group reconciliation by:** drop-down list to view the assets by IP address, or None to remove grouping.
5. To view the assets by Asset Type, click the checkbox **Show asset types in groups**.

6. To add the new assets to Inventory, click the **Save** button, and the assets will automatically be added to Inventory and removed from the **New** tab..

   A confirmation dialog displays to notify you of the number of assets that will be added to Inventory.

   > You can select several assets at once. Press and hold the **Ctrl** key while you select the assets. If you're selecting assets in a continuous list, press and hold the **Shift** key while selecting them. Then right click the assets and select **Add** to **Inventory**.

7. If you're not sure how you want to manage a particular asset, right click the asset (or assets) and select **Skip**.
   When you return to the **Asset Reconciliation - Discovery** window once it has been saved and closed, the designation will be reset to their previous state (such as Add to Inventory).
8. If you don't want to track the asset, right click the asset (or assets) and select **Ignore future scans**.
   The discovery process will ignore the asset in the next scan.
9. If you want to match the new asset with one already in inventory, right click the asset (or assets) and select **Match to Existing Asset**.
10. If you want to change the asset type (in order to easily identify the asset, such as desktop, laptop, etc.), see Changing Asset Types (Asset Types are created in the Administration Console).
11. When you are finished managing the new assets, click the **Save** button.

Next topic: Managing Matched Assets (Discovery)

Managing Matched Assets (Discovery)

Assets that match those already audited in Inventory (based on the MAC address or other criteria) are placed in the Matched list (on the **Matched** tab of the **Asset Reconciliation - Discovery** window). You can save the list to accept the designation, skip, match each asset to another asset, or unlink the scan and asset.
To Manage Matched Assets:

1. To access the **Asset Reconciliation - Discovery** window, select **Manage Discovered Assets** from the **Tools** menu on the main menu bar (while in the **Inventory** module).

   > You can also access the window by the following:
   > - Select **Manage Discovered Assets** from the **Tasks** pane in the **Inventory** module, **OR**
   > - Select the **Manage Discovered Assets** icon from the **Tools** menu in the **Inventory module.**

2. Select the **Matched** tab on the **Asset Reconciliation - Discovery** window.
3. Click the Expand (+) button to view all the assets.
   The assets are grouped by the following designations:

Probable Matches	Discovered assets that match those in inventory (by MAC address or other criteria)
No Changes	Discovered assets with no changes since the last discovery scan
Changes	Discovered assets that have changed since the last discovery scan

4. The list of assets is grouped by domain; however, you can click the **Group reconciliation by:** drop-down list to view the assets by IP address, or None to remove grouping.
5. To view the assets by Asset Type, click the checkbox **Show asset types in groups**.
6. By default all of the matched assets are designated Accept (see the **Action** column). If you want to clear the Matched list (since the assets are already matched to inventory, click the **Save** button.
   The Matched list will be cleared until the next discovery scan, and the assets display in the **Inventory** module.
7. If you're not sure how you want to manage a particular asset, right click the asset (or assets) and select **Skip**.
   When you return to the **Asset Reconciliation - Discovery** window once it has been saved and closed, the designation will be reset to their previous state (such as Add to Inventory).

> You can select several assets at once. Press and hold the **Ctrl** key while you select the assets. If you're selecting assets in a continuous list, press and hold the **Shift** key while selecting them.

8. To match the asset to another asset in inventory, right click and select **Match to another asset**.
   a. The **Search** dialog displays. Enter the first four characters of the Asset Name or Asset ID in the **Search for:** field, then click the **Search** button.
   b. Click the asset from the search results, then click the **Select** button.
9. If you want to remove the link between the discovered asset and the match found by BMC Track-It! in inventory, right click and select **Unlink scan and asset**.
10. When you are finished managing the matched assets, click the **Save** button.

Next Topic: Managing Missing Assets (Discovery)

Managing Missing Assets (Discovery)

The discovery process compares assets found on the network with those in inventory. If the assets were listed in inventory, but not found during the current scan, they are listed on the Missing tab of the **Asset Reconciliation - Discovery** window. You can skip them, ignore them, or remove them from inventory.
To Manage Missing Assets:

1. To access the **Asset Reconciliation - Discovery** window, select **Manage Discovered Assets** from the **Tools** menu on the main menu bar (while in the **Inventory** module).

> You can also access the window by the following:
> - Select **Manage Discovered Assets** from the **Tasks** pane in the **Inventory** module, **OR**
> - Select the **Manage Discovered Assets** icon from the **Tools** menu in the **Inventory module.**

2. Select the **Missing** tab on the **Asset Reconciliation - Discovery** window.
3. Click the Expand (+) button to view all the assets.
   The assets are grouped by Previously Scanned and Never Scanned.
4. The list of assets is grouped by domain; however, you can click the **Group reconciliation by:** drop-down list to view the assets by IP address, or None to remove grouping.
5. To view the assets by Asset Type, click the checkbox **Show asset types in groups**.

6. To view the missing assets that have not been found since a day, week, or month, click the designated drop-down list.
7. If you're not sure how you want to manage a particular asset, right click the asset (or assets) and select **Skip**.
   When you return to the **Asset Reconciliation - Discovery** window once it has been saved and closed, the designation will be reset to their previous state (such as Add to Inventory).

   > You can select several assets at once. Press and hold the **Ctrl** key while you select the assets. If you're selecting assets in a continuous list, press and hold the **Shift** key while selecting them.

8. If you don't want to track the asset, right click the asset (or assets) and select **Always ignore asset**.
9. To remove an asset legitimately missing from inventory, right click and select **Remove from inventory**.
   a. Click the **Save** button.
   b. The **Delete Asset** dialog displays. Select the checkbox of any associated Tracked Items you want to transfer to **Unassigned Equipment**, then click the **OK** button.
   c. Click the **Yes** button when the **Delete Assets** confirmation message displays.
   The asset is removed from inventory.
10. When you are finished managing the matched assets, click the **Save** button.

Next Topic: Viewing Unidentified Assets (Discovery)

Viewing Unidentified Assets (Discovery)

Discovered assets that only have an IP address (and neither a MAC Address nor a Name) are placed on the **Unidentified** tab of the **Asset Reconciliation - Discovery** window. These assets are listed for information only, and you won't be able to move them to Inventory, since at a minimum, an asset must have a MAC Address or Name. For more information on unidentified assets, see our KnowledgeBase article "Unidentified Assets Found by Discovery"

To View Unidentified Assets:

1. To access the **Asset Reconciliation - Discovery** window, select **Manage Discovered Assets** from the **Tools** menu on the main menu bar (while in the **Inventory** module).

   > You can also access the window by selecting **Manage Discovered Assets** from the **Tasks** pane in the **Inventory** module.

2. Select the **Unidentified** tab on the **Asset Reconciliation - Discovery** window.

3. Click the Cancel button to close the **Asset Reconciliation - Discovery** window.

   The assets will remain on the **Unidentified** tab until the next time the discovery process is run.

Manually Adding Assets

The best way to add IT assets is to let BMC Track-It! discover them using the Asset Discovery feature (see Discovering Network Assets). If necessary, however, you can manually add assets in the Inventory module. This may be useful for non-IT assets (such as DVD players or projectors).

If you have a license for the **Bar Code Solution**, you can scan the asset with your bar code device, then add it to inventory through the **Manage Bar Code Assets** window. (See Getting Started with the BMC Track-It! Bar Code Solution).
To Manually Add an Asset:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Tasks** pane, click **New Asset** (or from the **Menu Bar**, select **New/Asset** from the **File** menu).
3. Select the asset type (such as Computer or Printer) from the **Select Asset Type** dialog, then click the **OK** button.
   The **Asset** window displays.

To Add Asset Details:
The top pane of the **Asset** window displays the most commonly-used fields to describe an asset: Type, ID, User, Department, Department Number, and Location.

1. The **Asset Type** displays by default, as previously selected.
2. Enter the asset's ID number in the **Asset ID** field (typically, this is the company asset tag or serial number).
3. Select or enter the user's name associated with the asset from the **User** drop-down list.
   To add a user name if it is not listed, click the **Add** button next to the **User** drop-down arrow.
   To change a user name associated with the asset, either select another name from the drop-down list, **OR** click the **Ellipses** (...) button. Enter the first few letters of the first or last name, and click the **Search** button. Select the user, then click the **Select** button.
4. Select or enter the department from the **Department** drop-down list.
5. Select or enter a department number from the **Department Number** drop-down list.
6. Select or enter a location from the **Location** drop-down list.
7. Click the **Save** button.

Additional information about the asset is automatically displayed on specific tabs when during the audit process, and some are user-defined. See each topic below for details:

Entering User-defined Asset Information (Manage/User-defined Fields, Description, and Graphic tabs)
Viewing Audit Results (Software, File Information, Tracked Items, and Hardware tabs)

Working with Assets and Items

Working with Assets (Overview)

Once you add Assets to Inventory, you can view, edit, copy, delete, and audit them. You can also promote Items to Assets to track them individually.

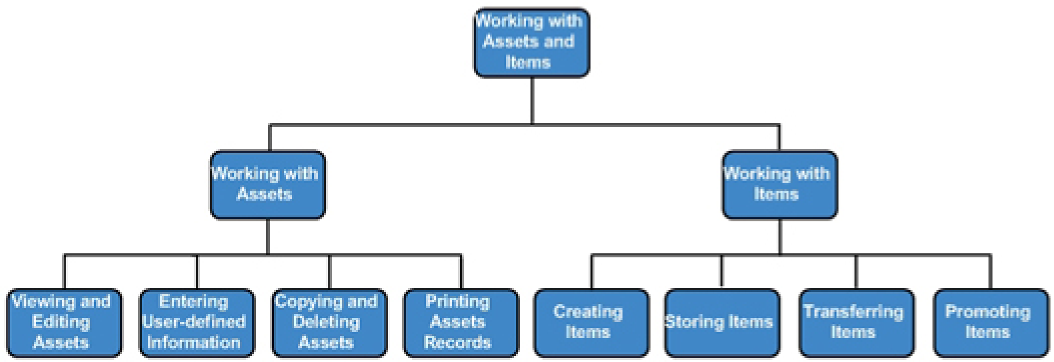
Next Topic:

Viewing and Editing Assets

See also: Working with Items

Working with Assets and Items (Workflow)

The flowchart below represents the tasks in the following topics.



Next Topic:
Viewing and Editing Assets

Viewing and Editing Assets

The list of assets is displayed in the Inventory grid (Inventory module). For detailed information on working with grid views, see Viewing Information in Grids). If you have a license for the **BMC Track-It! Bar Code solution**, you'll see additional screen elements noted below. (See Getting Started with the BMC Track-It! Bar Code Solution for more information).

To View Asset Information:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
   The **Inventory** window displays and assets are listed in the grid. You can specify which columns to view (See Creating User-defined Views). The number of records display at the bottom of the grid. If you have a license for the **Track-It Bar Code solution**, you will also see a link in the **Tasks** pane to **Asset Reconciliation - Bar Code**.
2. In the **Inventory** grid, double-click the Asset you want to view, or select the asset, then select **Open Asset** in the **Tasks** pane.
   The Asset record opens. If you have a license for the **Bar Coding Solution**, you will also see the Company Asset Tag associated to the asset, if applied.
   The top pane of the **Asset** window displays the most commonly-used fields to describe an asset: Type, ID, User, Department, Department Number, and Location.

   Additional information about the asset is automatically displayed on specific tabs when during the audit process, and some are user-defined. See each topic below for details:

   Entering User-defined Asset Information (Manage/User-defined Fields, Description, and Graphic tabs)
   Viewing Audit Results (Software, File Information, Tracked Items, and Hardware tabs)

Editing Assets

It is best to allow the auditing process to update assets; however, you can manually edit certain fields in the Asset record. See Entering User-defined Asset Information.

Customizing the Tabs Display

You can select which tabs to display, and which two to display at a time.

To Customize the Tabs Display:

1. Right click any tab name, and select the check boxes of the tabs you want to display.
2. To display two tabs at once, right click the right pane (appears blank until a tab has been selected), then select a tab name.

See Also: Viewing Information in Grids

Viewing an Asset's Audit Trail

BMC Track-It! automatically tracks certain Technician and system activity related to an asset and displays this information on the **Audit Trail** tab of the Asset detail window. The Audit Trail displays what was changed, at what date and time, and who made the change for the following attributes:

- Asset ID
- Department
- Department Number
- Location
- User

Audit Trail information can also be used to generate reports.

You can also view the Audit Trail for all Assets in the Administration Console (see Viewing the Inventory Audit trail for Asset Changes in the Administrator's Guide).
To View an Asset's Audit Trail:

1. Click the **Audit Trail** tab of the **Asset** detail window.
   Activities display in reverse chronological order.

Selecting and Changing Asset Types

This dialog is accessed from the Inventory module when creating new assets or changing Asset Types. See Manually Adding Assets and Promoting Items to Assets.

Note: You can change the system type (Computer, Hub, Printer, Router, Switch, or Other) of the asset type. However, if the asset is a Computer, and it has already been audited, you cannot change its system asset type.

1. From the **Select Asset Type** dialog, select the type of asset to create for the Item (such as Hub, Router, or Other), then click the **OK** button.
   If your BMC Track-It! Administrator has created Asset Types, these will also display under the system asset types, such as Laptop under Computer.
2. If you are changing an asset's type:
   - A **Change Asset Type** warning will display if you attempt to change a system type, saying that this may cause a loss of data that is specific to the asset's current type.
   - The **Results** dialog will display the Item, Outcome (Successful or Failed), Reason, and Description (such as the System Type for the Asset cannot be changed because it has already been audited (only Computers can be audited).
3. If you've created a new asset and selected the asset type, click the **OK** button on the **Select Asset Type** dialog to return to the Inventory grid.

Entering User-defined Asset Information

Your BMC Track-It! Administrator can set up company-specific (user-defined) fields to describe assets. This is useful if you want to add information about an asset that is not captured automatically by BMC Track-It! during the discovery and auditing processes.
This information is entered on the Manage tab of the Asset window in the Inventory module. You can also add an image of the asset.
To Access the Asset Window:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. Double click the asset in the Inventory grid. The **Asset** window displays.

To Enter User-defined Information:

1. On the **Manage** tab of the **Asset** window, enter the information in the text boxes. (The six user-defined field labels display as Custom Text #1 through #6 until your Administrator changes the names).
2. On the **Description** tab, enter the information in the text box.
3. On the **Graphics** tab, click the **Browse** button, open the graphics file that you want to display, then click the **Save** button on the **Asset** window.

Next Topic:
Copying and Deleting Assets

Associating an Asset with a User

You can associate multiple assets with a user to keep track of all of the assets assigned to a user, and to narrow the list of assets displayed when work orders are created. (See Selecting the Requestor's Asset and Viewing Asset Details for a Work Order).

If you want to save time, you can configure the audit process so that when assets are audited, users are prompted to enter their user name and other information. You can also prompt the user to provide information during the audit process (See Configuring User Interaction for Audits in the Administrator's Guide).

To Associate an Asset with a User:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Inventory** grid, right click the Asset, then select **Change Associated User**.
   (You can also double-click the Asset and select a user from the **User** drop-down list on the **Asset** window.
3. On the **Change Associated User** dialog, enter the first few characters of the user's name in the **Search for** text box, then click the **Search** button.
4. Select the user to associate with the Asset, then click the **Select** button.

Associating an Asset with a Department

The audit process can be configured so that when assets are audited, users are prompted to enter their user name and other information. However, you can manually associate an asset with a department on the Asset window.

To Associate an Asset with a Department:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Inventory** grid, right click the Asset, then select **Change Associated Department**.
   (You can also double-click the Asset and select a department from the **Department** drop-down list on the **Asset** window.
3. On the **Change Associated Department** dialog, enter the first few characters of the user's name in the **Search for** text box, then click the **Search** button.
4. Select the **Department** to associate with the Asset, then click the **Select** button.

Associating a Location with an Asset

The audit process can be configured so that when assets are audited, users are prompted to enter their user name and other information. However, you can manually associate an asset with a Location on the Asset window.

To Associate an Asset with a Location:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.

2. In the **Inventory** grid, right click the Asset, then select **Change Associated Location**.
   (You can also double-click the Asset and select a department from the **Location** drop-down list on the **Asset** window.
3. On the **Change Associated Location** dialog, enter the first few characters of the user's name in the **Search for** text box, then click the **Search** button.
4. Select the **Location** to associate with the Asset, then click the **Select** button.

Attaching Files to Assets

You can add files to Assets, such as text files, documents, or images. You can also rename and delete file attachments.
To View Asset Attachments:

1. In the **Inventory** grid, double-click the Asset you want to view, or select the asset, then select **Open Asset** in the **Tasks** pane.
2. Right click the file on the **Attachments** tab, then select **Open**.

Tip: You can customize the grid view and add the **# of Attachments** column to quickly view which records have attachments. See Showing and Hiding Columns in the [Creating User-defined Views] topic.
To Attach a File to an Asset:

1. Select the **Attachments** tab on the **Asset** window.
2. Click the **Add** button.
3. In the **Open Attachment** dialog, navigate to the location of the file, then double click it, or select it and click the **Open** button.
   The file displays on the **Attachments** tab on the **Asset** window.
4. Click the **Save** button.

To Rename a File Attachment:

1. Right click the file on the **Attachments** tab, then select **Rename**.

To Delete a File Attachment from an Asset:

1. Select the file on the **Attachments** tab, then press the **Delete** key. Click **Yes** on the **Delete Attachment(s)** confirmation dialog.
   You can also right click the file and select **Delete.**
2. Click the **Save** button on the **Asset** window.

To Sort the List of Attachments:

1. Click the column header (e.g. "Name").

To Change the Grid View of the List of Attachments:

1. Right click anywhere on the **Attachments** tab, then select **View**.
2. Select an option from the View menu (Text Only, Wrap Text, Auto Arrange).

Copying and Deleting Assets

Copying an Asset

You can copy assets in the Inventory module to save time when you need to manually add them.
Important: If you have a license for the BMC Track-It! Bar Code solution and you copy an asset, an additional bar code license will not be automatically associated with the copied asset.
To Copy an Asset:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. Right click the asset from the Inventory grid and select **Copy**.
   You can also select the asset and press **CTRL+C, OR**
   Click the **Copy** icon on the main toolbar, **OR**
   Click **Copy Asset** from the **Tasks** pane.
3. On the **Copy Asset** dialog, select or enter the number of copies to make.
4. To also copy the tracked items associated with the asset, click the **Copy Tracked Items** check box.

5. Click the **OK** button.
   The copied asset(s) display in the Inventory grid, and are automatically assigned an Asset ID (a system-generated consecutive number). You can edit the copied asset as necessary.

Deleting Assets

When necessary, assets can be deleted from Inventory. You can also decide whether or not to delete tracked items associated with the asset, or transfer them to Unassigned Equipment.

Notes:

- If you have a license for the BMC Track-It! Bar Code solution, when you delete an asset, all of the asset's associated bar code information is also deleted. See Unlinking a Bar Code Scan from an Asset.
- You can also retire assets until you're ready to delete them. See Retiring Assets.

To Delete an Asset:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. Right click the asset (or multiple assets at a time) from the Inventory grid and select **Delete**.
3. On the **Delete Asset** dialog, select the checkbox of any associated Tracked Items you want to transfer to **Unassigned Equipment**, then click the **OK** button.
4. Click the **Yes** button when the confirmation message displays.

Next Topic:
Printing Asset Records

See also: Storing Items in the Unassigned Equipment List, Manually Adding Assets and Viewing and Editing Assets

Printing Asset Records

To Print an Asset Record:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. Right click the asset from the Inventory grid and select **Print**, **OR**
   Select the asset and press **CTRL+P, OR**
   Click the **Print** icon on the main toolbar, **OR**
   Click **Print Asset** from the **Tasks** pane.

Working with Items

Working with Items (Overview)

In BMC Track-It! you can create a catalog of common Items you'll be purchasing and/or adding to inventory to save time with data entry, you can store items in the Unassigned Equipment list, transfer Items to and from the Unassigned Equipment list and other Assets, and promote Items to Assets.

Creating the Master Items Catalog for Purchasing, Inventory, and Library

Master Item List

The Master Items list is a "catalog" of Items you can create to list items you may be purchasing and/or adding to inventory. This list saves time with data entry. The list is similar to a catalog or product list. The items in the list are not actual purchases or inventory until you choose to add them to purchase orders or as Tracked Items in the Inventory module. The list can include virtually any type of Item -- from hardware to software or any other type of asset. In BMC Track-It!, an Item is the smallest increment of anything you would want to purchase and/or track in inventory. Examples of Items are: hardware such as CPUs, monitors, and keyboards; software, and non-PC assets such as DVD players. When you create an Item, you can include such information as Product, Manufacturer, Type (such as Desktop, Laptop, or Software), Vendor, Price, Warranty and Maintenance information, and more.

Items

There are several types of Items in BMC Track-It!:

- Items in the Master Item List
    - Not yet part of inventory -- similar to a catalog of Items to be purchased or placed into inventory
    - Manually added to the Master Item List by the BMC Track-It! Administrator
- Items purchased (Purchasing Module)
- Items placed into inventory (Inventory Module) by
    - being automatically detected along with its associated asset via the audit process
    - receiving purchase order Items
    - associating them to an Asset
    - storing them in the Unassigned Equipment list
        - Unassigned Equipment is an Asset used as a container to hold Items in inventory not yet associated to a particular asset

Assets and Items

Items are typically associated with an Asset, such as a computer or workstation, so that they can be tracked in the system. During the auditing process, BMC Track-It! places the Items in the Tracked Items list for the associated Asset (such as a computer and its peripherals). You can transfer items between assets and the Unassigned Equipment list. You can also promote an item to an asset so that it can be tracked (for items that wouldn't ordinarily be found during the audit process, such as those not connected to a network.

Creating Items in the Master Item List

You can access the **Master Item** list from:

- **the Administration Console**
- an individual asset in the **Inventory** module
- a purchase order in the **Purchasing** module (and from the **See Also** link in the **Tasks** pane)
- a library item in the Library module (and from the **See Also** link in the **Tasks** pane)
- a software title in the Software module (and from the **See Also** link in the **Tasks** pane)

To Create an Item in the Master Item List from the Administration Console:

1. Select **Administration Console** from the **Tools** menu on the main menu bar.
2. In the **Administration Console**, select **Lookup Tables/ Inventory/Master Items**.
3. On the **Master Items** panel, click the **Add** button.
   The **Master Item** dialog displays.
4. Enter a description for the Item in the **Product Description** field (required).
5. Select or enter a category for the Item from the **Product Type** drop-down list (required).
   To add a Product Type if it is not listed, click the **Add** button next to the **Product Type** drop-down arrow.

   The following are optional:
    - Manufacturer
    - Part Number
    - Vendor
    - Warranty
    - Support

  - Price
  - Maintenance Vendor
  - Contact Person
  - Comments
6. If you have a license for the **Software License Management** module, you can associate a Software Item with an item in the **Master Items** list on the **Software** tab. (See Associating Software Titles with Master Items in the Technician's Guide.)
7. Click the **Apply** button to save your changes, and the **OK** button to close the window.

To Create an Item in the Master Item List from an Asset in the Inventory Module:
1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Inventory** grid, double-click any Asset.
3. Select the **Tracked Items** tab on the left pane, then click the **Add** button.
4. Click the **New** button on the **Master Item Listing** dialog.
   The **Master Item** dialog displays.
5. Enter a description for the Item in the **Product Description** field (required).
6. Follow steps 4-5 above.
7. Click the **Save** button.

Deleting Items from the Master Item List

You can delete items from the Master Item list via the **Administration Console**.
To Delete an Item from the Master Item List (Administration Console):
1. Follow the steps above to access the **Master Item List** from the **Administration Console**.
2. Select the item and click the **Delete** button.
3. Click **Yes** when the confirmation message displays.

See also: Viewing Information in Grids in the Technician's Guide.

Next topic: Storing Items in the Unassigned Equipment Asset

Storing Items in the Unassigned Equipment List

You can store inventory items in a specially-designated asset in BMC Track-It! (called Unassigned Equipment) which serves as a container until you're ready to associate them with an asset or assets. This can include hardware, software, or any type of item. You can also transfer items and promote them to assets.

Notes:

- The **Unassigned Equipment** asset record cannot be deleted. (However, items associated with Unassigned Equipment can be deleted from the Tracked Items tab associated with the particular asset).

- **Supplies** is a special Product Type that is handled different from all other product types. If you receive an item of the Supplies type, that item will ***not*** be sent to **Unassigned Equipment** in the **Inventory** module. The reason for this is to avoid a scenario such as ordering 500 boxes of staples, and having each box of staples appear as a separate entry in **Unassigned Equipment**. See also Receiving Purchased Items into Inventory and Transferring Items to and from the Unassigned Equipment List.

To View the Unassigned Equipment List:
1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. Select **All Assets** from the **Current View/System Views** menu.
3. Expand the **Type: Storage** list in the Inventory grid.

4. Double click the **Unassigned Equipment** asset.

   The list of inventoried items that are not currently assigned to any asset displays on the **Tracked Items** tab.

See Also: Transferring Items to and from Unassigned Equipment

Transferring Items to and from the Unassigned Equipment List

You can transfer inventoried Items to and from the Unassigned Equipment list so that you can keep Items all in one location until you're ready to associate them with a particular asset (such as a computer). When you receive an Item in the **Purchase Order** module, you can select to transfer the Item to the **Unassigned Equipment** list. Then you can transfer the Item to the particular asset for which it was purchased (such as a monitor or other equipment).

Notes:

- You cannot delete the asset designated as Unassigned Equipment.

- **Supplies** is a special Product Type that is handled different from all other product types. If you receive an item of the Supplies type, that item will ***not*** be sent to **Unassigned Equipment** in the **Inventory** module. The reason for this is to avoid a scenario such as ordering 500 boxes of staples, and having each box of staples appear as a separate entry in **Unassigned Equipment**. See also Receiving Purchased Items into Inventory and Storing Items in the Unassigned Equipment List.

To View the Unassigned Equipment List:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. Select **All Assets** from the **Current View/System Views** menu.
3. Expand the **Type: Other** list in the Inventory grid (this is beneath the **Type: Computer** list).
4. Double click the **Unassigned Equipment** asset.
5. Select the **Tracked Items** tab on the **Other Unassigned Equipment** window.

   The list of inventoried items that are not currently assigned to any asset displays on the **Tracked Items** tab.

To Transfer an Item to the Unassigned Equipment List:
Normally when Items are received with Purchase Orders, they are transferred to the Unassigned Equipment list (this option can be selected by the person receiving the items. So you'll only need to manually transfer an Item if you want to associate it with a different asset.

1. Select the Item associated to the asset in the asset's Tracked Items list (**Tracked Items** tab). (See also Viewing and Editing Assets).
2. Click the **Transfer** button on the **Tracked Items** tab.
3. Select **Transfer to Unassigned Equipment**.
4. Click the **Save** button.
   The Item displays on the Tracked Items tab of in the Unassigned Equipment list.

To Transfer an Item from the Unassigned Equipment List to an Asset:

1. Open the Item in the Unassigned Equipment asset (on the **Tracked Items** tab).
2. Select the Item, then click the **Transfer** button on the **Tracked Items** tab.
   The **Transfer Tracked Item** dialog displays.

3. Enter a search term in the **Search for** text box (the first four characters of any value) for the following Asset fields:
    - Asset ID
    - Asset Type
    - User Department
    - User Department Number
    - User Location
    - User Name
4. Click the **Search** button.
   The search results display the assets with your search criteria. You can customize the grid to view more columns. (See also Creating User-defined Views).
5. Select the asset to receive the Item on the **Transfer Tracked Item** dialog, then click the **Transfer** button.
   The Transfer Tracked Item dialog closes.
6. Click the **Save** button on the Asset window.
   The Item is transferred and displays on the Tracked Items tab of the Asset.

Next Topic
Transferring Items Between Assets

Transferring Items Between Assets

You can transfer Items between Assets. This is useful, for example, when hardware or software is uninstalled on one computer and installed on another.
To Transfer Items Between Assets:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Inventory** grid, double-click the Asset with the Item you want to transfer.
3. Select the **Tracked Items** tab on the left pane.
4. Select the **Item** to transfer to another asset, then click the **Transfer** button.
5. From the **Transfer Tracked Item** dialog, locate the asset that will receive the Item by entering a search term in the **Search for** text box (the first four characters of any value) for the following Asset fields:
    - Asset ID
    - Asset Type
    - User Department
    - User Department Number
    - User Location
    - User Name
6. Click the **Search** button.
   The search results display the assets with your search criteria. You can customize the grid to view more columns. (See also Creating User-defined Views).
7. Select the asset to receive the Item, then click the **Transfer** button.
   The **Transfer Tracked Item** dialog closes.
8. Click the **Save** button on the **Asset** window (this is the Asset from which the Item will be transferred).
   The Item is transferred and displays on the **Tracked Items** tab of the Asset receiving the Item.

See also: Transferring Items to and from the Unassigned Equipment List

Next Topic:

Promoting Items to Assets

Manually Associating an Asset's Software with a Software Title

If you are using the Software License Management module, you can manually associate an asset's software with a software title. This may useful if a certain software has add-on components that you want to track.

To Manually Associate an Asset's Software with a Software Title:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Inventory** grid, double-click the Asset with the Item software you want to associate with a software title.
3. On the **Software** tab of the **Asset** window, select the **Programs** or **Files** tab.
4. Select the program or file, then click the **Associate** button.
5. On the **Title Listing** dialog, select the title to associate with the software, then click the **Select** button.
6. Click the **Save** button on the **Asset** window.
   The **Installed Program** window now displays the associated **Software Title** with the **Program Name**. (To view the **Installed Program** window, double click the software from the **Program** tab on the **Software** tab of the **Asset** window).

Promoting Items to Assets

You can promote an Item to an Asset so that you can track it on the Inventory grid and so that it is included in reports as a separate asset. This is useful for tracking Items that you don't want to associate with an Asset, such as a projector in a conference room. You can promote Items to assets from the Unassigned Equipment list, or from Items associated with an asset.
To Promote an Item to an Asset:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Inventory** grid, double-click the Asset (or the Unassigned Equipment asset).
3. Select the **Tracked Items** tab on the left pane.
4. Select the **Item** to promote to an asset, then click the **Promote** button.
5. From the **Select Asset Type** dialog, select the type of asset to create from the Item (such as Hub, Router, or Other), then click the **OK** button. (See Selecting and Changing Asset Types).
6. You can add details to the new asset on the **Asset** window that displays.
   If the Item was associated with an Asset, it is removed from the Asset's Tracked Items list, and displays on the Inventory grid.
7. From the **Asset** dialog, select **Save and Close** from the **Save** button's drop-down list.
   The promoted Item now displays as an Asset on the Inventory grid. (You may need to search or filter the list to locate it).

Auditing Assets

Auditing Assets (Overview)

After discovering and managing your IT assets, BMC Track-It! can continually audit the network and update inventory information.

There are three ways to audit your network:

- Scheduled Audits
- Audit on Demand
- Separately running the audit.exe application and the Merge Now feature

BMC Track-It! automatically merges audit results when you set up scheduled audits or audit workstations on demand. (The merge process adds new workstations to the Inventory module and updates workstations with the most recent audit data).

If you run the audit.exe program separately, you'll have to merge audit results with the Merge Now feature.

Caution: Before performing any audits on computers created from a Ghost image (cloned), be sure to remove the Trackitaudit.id file from the root of the C:, if it exists. (The file is hidden on the root of C: by default). If the file is not removed and multiple machines have the same Trackitaudit.id file, the audits will continuously merge into a single record in Inventory. For details, see our KnowledgeBase article "Track-It! 6.x, 7, 8.x, and 9 Audit Merge Process"

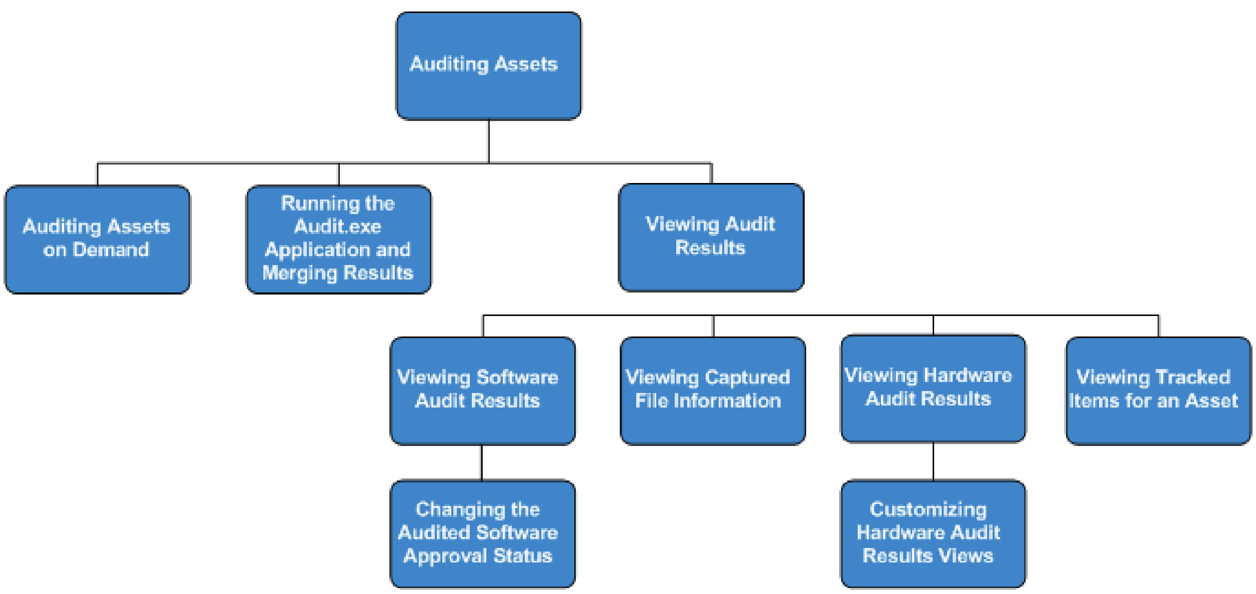
Note: Your BMC Track-It! Administrator configures asset auditing in the Administration Console and can customize the auditing process, including what, when and how BMC Track-It! will audit.

Next Topic: Auditing Assets (Workflow)

Auditing Assets (Workflow)

The flowchart below represents the tasks in the following topics.

Caution: Before performing any audits on computers created from a Ghost image (cloned), be sure to remove the Trackitaudit.id file from the root of the C:, if it exists. (The file is hidden on the root of C: by default). If the file is not removed and multiple machines have the same Trackitaudit.id file, the audits will continuously merge into a single record in Inventory. For details, see our KnowledgeBase article "Track-It! 6.x, 7, 8.x, and 9 Audit Merge Process"



Getting up and Running with Auditing Assets

Caution: Before performing any audits on computers created from a Ghost image (cloned), be sure to remove the Trackitaudit.id file from the root of the C:, if it exists. (The file is hidden on the root of C: by default). If the file is not removed and multiple machines have the same Trackitaudit.id file, the audits will continuously merge into a single record in Inventory. For details, see our KnowledgeBase article "Track-It! 6.x, 7, 8.x, and 9 Audit Merge Process"

TASK	MODULE/WINDOW	HELP TOPIC
1. Audit networked computers on demand, **OR**	Tools/Audit Workstations (from the Inventory module)	Auditing Assets on Demand
2. Audit standalone computers with the audit.exe application and audit merge	\\Program Files\BMC Software\Track-It!\Track-It! Server) where BMC Track-It! is installed and double click audit.exe	Running the audit.exe application and merging audit results
3. View audit results		
a. View software audit results	Tools/Administration Console/ Lookup Tables/ Installed Programs or Installed Files	Viewing Software Audit Results
• View all assets with a specific program or file	Inventory module/grid view/select computer/Software tab/Programs or Files tab. Right click the Program or File, then select Show Assets with Program or Show Assets with File.	Viewing All Assets with a Specific Program or File
• Change the audited software approval status	Inventory module/grid view/select computer/Software tab/Programs or Files tab. Right click the Program or File, then select Change State to...	Changing the Audited Software Approval Status
• View captured file information	Inventory module/grid view/select computer/File Information tab/Captured File drop-down	Viewing Captured File Information
b. View hardware audit results	Inventory module/grid view/select computer/Hardware tab/	Viewing Hardware Audit Results

Next Topic: Auditing Assets on Demand

Auditing Assets on Demand

After discovering and managing your assets, you can audit your computers for detailed information such as hardware, software and files.

The audit process automatically updates inventory information for each computer on the **Hardware** and **Software** tabs on the **Asset** window. The process also automatically updates the **Tracked Items** list for the computer with basic hardware and software information.

See also: Viewing Software Audit Results, Viewing Hardware Audit Results, and Viewing Tracked Items for an Asset.

Audit Results for all computers are displayed on the **Installed Programs** and **Installed Files** lists in the **Administration Console** (see Viewing Software Audit Results).

Caution: Before performing any audits on computers created from a Ghost image (cloned), be sure to remove the Trackitaudit.id file from the root of the C:, if it exists. (The file is hidden on the root of C: by default). If the file is not removed and multiple machines have the same Trackitaudit.id file, the audits will continuously merge into a single record in Inventory. For details, see our KnowledgeBase article "Track-It! 6.x, 7, 8.x, and 9 Audit Merge Process"

Note: Your BMC Track-It! Administrator configures asset auditing in the Administration Console and can customize the auditing process, including what, when and how BMC Track-It! will audit, including scheduled audits (see Configuring Scheduled Audits in the Administrator's Guide).
To Audit Assets on Demand:

1. Select the **Inventory** module from the **Navigation Pane.**
2. Select the assets you want to audit from the Inventory grid.

   You can select multiple assets by holding the Ctrl key while selecting them. Hold the Shift key to select multiple assets in sequential order.

3. Select **Audit Workstations** from the **Tasks** pane, the **Audit Workstations** icon on the **Toolbar**, or the **Tools** menu. You can also right click and select **Audit Now**.

   When you run an audit, either on demand or through scheduled audits, BMC Track-It! Agent is installed on the client's computer. Depending on Administration settings, the Agent icon displays on the end user's task bar.

   The **Audit Workstation** dialog displays the audit status for each asset (such as Waiting, Requested, or Succeeded).

   The audit process will run in the background, so you can minimize or close the **Audit Workstation** dialog if you choose. The audit process is completed when the Status column displays a check mark and "Succeeded" displays next to the asset in there **Audit Queue Status Name** column.

4. Click the **Close** button to return to the **Inventory** grid.

To help on viewing audit results, click the links above.

See also: Configuring Scheduled Audits

Including and Excluding Computers from Scheduled Audits

You can exclude specific computers from scheduled audits (such as servers, for example). Computers must be selected in the Inventory grid before the scheduled audit is run.
Scheduled Audits are configured by your BMC Track-It! Administrator (see Configuring Scheduled Audits in the Administrator's Guide).

Caution: Before performing any audits on computers created from a Ghost image (cloned), be sure to remove the Trackitaudit.id file from the root of the C:, if it exists. (The file is hidden on the root of C: by default). If the file is not removed and multiple machines have the same Trackitaudit.id file, the audits will continuously merge into a single record in Inventory. For details, see our KnowledgeBase article "Track-It! 6.x, 7, 8.x, and 9 Audit Merge Process"

To Exclude Computers from Scheduled Audits:

By default, computers are included in Scheduled Audits. Only computers can be excluded from Scheduled Audits (not printers or other assets).

1. Right click to select the computer(s) in the **Inventory** grid (you can select multiple computers).
2. If you've selected a single computer, select **Include in Scheduled Operations** from the context menu. For multiple selections, select **Exclude from Scheduled Audit Operations** in the context menu.

    Note: If you select an asset that is not a computer, the Results dialog will display with an Outcome of "Failed". Close the dialog, then deselect the asset.

    The **Included in Scheduled Audits** column in the **Inventory** grid displays an icon for all computers with scheduled audits (and no icon for excluded computers). The **Hardware** tab of the **Asset** detail window displays a checkbox: **Include this Asset in Scheduled Audit Operations**, which is checked by default unless the computers has been excluded.

Related Topics: Configuring Scheduled Audits in the Administrator's Guide.

Running the Audit.exe Application and Merging Audit Results

If necessary, you can run Track-It's audit.exe application separately. (You may want to run this instead of scheduled audits or auditing workstations on demand through the Technician Client for auditing standalone computers). If you run audit.exe, the BMC Track-It! Audit wizard will guide you through the process. However, you'll also have to merge audit results with the Merge Now feature. (The merge process adds new workstations to the Inventory module and updates workstations with the most recent audit data).

Caution: Before performing any audits on computers created from a Ghost image (cloned), be sure to remove the Trackitaudit.id file from the root of the C:, if it exists. (The file is hidden on the root of C: by default). If the file is not removed and multiple machines have the same Trackitaudit.id file, the audits will continuously merge into a single record in Inventory. For details, see our KnowledgeBase article "Track-It! 6.x, 7, 8.x, and 9 Audit Merge Process"

Notes:

- BMC Track-It! automatically merges audit results when you set up scheduled audits or audit workstations on demand.
- Your BMC Track-It! Administrator configures asset auditing in the Administration Console and can customize the auditing process, including what, when and how BMC Track-It! will audit. Audit results are dependent upon this configuration.

To Run the audit.exe Application:

1. Navigate to the BMC Track-It! Server (\\Program Files\BMC Software\Track-It!\Track-It! Server) where BMC Track-It! is installed.
2. Double click **audit.exe**.
3. Click **Next** when the "Welcome to BMC Track-It! Audit" dialog displays.

    The Audit in Progress dialog displays, along with a progress bar as software, hardware, and files are audited, and results are saved

4. Click the **Next** button on the **Audit in Progress** dialog.

   The computer name is displayed for the computer being audited.

5. Click the **Next** button when the hardware audit results are shown.
6. Click the **Next** button when the software audit results are shown.
7. Click the **Finish** button when the last dialog displays notifying you that the audit is successfully completed.

To Merge Audit Data:
You can merge audit data from either the Inventory module or the Administration Console.

Note: BMC Track-It! automatically merges audit results when you set up scheduled audits or audit workstations on demand.

1. From the Inventory module, click Merge Audit Data from the Tools menu, or from the Tasks pane.
2. From the Administration Console:
   a. From the main menu bar, select **Tools/Administration Console/Configuration/Inventory/ Merging/Schedule**.
3. On the **Schedule** panel, click the **Merge Now** button.

   The **Merge Status** dialog displays. When the merge is complete, the dialog displays the number of merged files per computer.

4. To view merge details, click the **View Log** button.

See also: Viewing Software Audit Results and Viewing Hardware Audit Results.

Viewing Audit Results

Software

Viewing Software Audit Results

The lists of audited software and related executable files (such as .exe) are displayed in the following locations:

- the **Software** tab of a particular computer's record (in the **Inventory** module), and the
- the **Administration Console** (Lookup Tables/(Administration)

Note: BMC Track-It! Administrators can configure how auditing results are displayed in the Administration Console. See the Inventory/Auditing chapter of the Administrator's Guide.
Audit Results for All Computers
Note: You can also view a list of assets with a specific program or file from an individual asset record. See **Audit results for Individual Computers**, below.
To View All Audited Software on All Computers:

1. Select **Tools/Administration Console/Lookup Tables**.
2. Select **Installed Programs** or **Installed Files**.
3. You can filter the audit results by selecting one of the following options from the **View** drop-down list:

- Unidentified
- Approved - Supported
- Permitted - Unsupported
- Alerts - Prohibited

See Also: Changing the Audited Software Approval Status

Audit Results for Individual Computers

The **Software** tab on the **Computer** window allows you to view the software audit results for a particular computer.
To View an Individual Computer's Audited Software:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer to view the audit results.
   You can also open a computer record by selecting it and clicking **Open Asset** in the **Tasks** pane. The Asset window displays (the window's title bar displays the asset type, such as Computer or Server).
3. Select the **Software** tab.
4. Select the **Programs** or **Files** tabs to view the audited software and files.
5. You can filter the audit results by selecting one of the following options from the **View** drop-down list:

   - Unidentified
   - Approved - Supported
   - Permitted - Unsupported
   - Alerts - Prohibited

   For more information on the categories above, see Changing the Audited Software Approval Status.

6. Double click a Program or File to view details.
   The **Installed Program** or **Installed File** dialog displays information about the Publisher, Version, Software Title, and Number of Installations. A list of all assets with the specific program or file is displayed.
7. To view the assets, double click the asset in the grid.

Viewing All Assets with a Specific Program or File

While viewing software audit results for a specific computer, you can view all other computers with the same programs or files installed.
To View All Assets with a Specific Program or File:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer to view the audit results.
   You can also open a computer record by selecting it and clicking **Open Asset** in the **Tasks** pane. The **Asset** window displays (the window's title bar displays the asset type, such as Computer or Server).
3. Select the **Software** tab.
4. Select the **Programs** or **Files** tab.
5. Right click the **Program** or **File**, then select **Show Assets with Program** or **Show Assets with File**.
   The **Assets with Program** or **Assets with File** dialog displays the list of computers with the specific installed program or file.

Changing the Audited Software Approval Status

The lists of audited software and related executable files (such as .exe) are displayed in the following locations:

- the **Software** tab of a particular computer's record (in the **Inventory** module), and the
- the **Administration Console** (Lookup Tables)

By default, all new software and executable files found during an audit display in the **Unidentified** software list. You can then review the new software and categorize each application into one of the following approval states:

Audited Software Status	**Description**
Unidentified	New software found during an audit and not yet categorized by a Technician or Administrator
Approved - Supported	Software found during an audit that has been designated as approved by a Technician or Administrator and is supported by the Help Desk staff.
Permitted - Unsupported	Software found during an audit that has been designated as permitted by a Technician or Administrator, but is not supported by the Help Desk staff.
Alerts - Prohibited	Software found during an audit that has been designated as prohibited by a Technician or Administrator, and should be uninstalled from the computer.

The advantage of categorizing the Unidentified software is so that you can immediately identify new software found during audits, since it will automatically display in the Unidentified list.
To Change the Audited Software's Status:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer to view the audit results.
   You can also open a computer record by selecting it and clicking **Open Asset** in the **Tasks** pane. The Asset window displays (the window's title bar displays the asset type, such as Computer or Server).
3. Select the **Software** tab.
4. Select the **Programs** or **Files** tabs to view the audited software and files.
5. Select an option from the **View** drop-down list (such as Unidentified).
6. Select the software application or applications, then select an option (such as Change State to Approved - Supported) from the **Change** button.
   You can also right click to change the states. The software is moved to the new status list.
7. Click the **Save** button.

When the next audit is performed, new software will display in the **Unidentified** list.

Viewing Captured File Information

Your BMC Track-It! Administrator can configure the audit process to automatically capture file Information (such as the computer's start-up files -- autoexec.bat, win.ini, etc.). It can also run executable commands and capture the output. (See Configuring Auditing to Capture Specific Files and Run Commands in the Administrator's Guide.)

To View Captured File Information:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer to view the audit results.
   You can also open a computer record by selecting it and clicking **Open Asset** in the **Tasks** pane. The **Asset** window displays (the window's title bar displays the asset type, such as Computer or Server).
3. Select the **File Information** tab.
4. Select the file from the **Captured File** drop-down list.
   The captured files details display.

Hardware

Viewing Hardware Audit Results

The **Hardware** tab on the **Asset** window enables you to view the hardware audit results for a computer and its peripherals by audit date and time. The list of audited hardware is provided along with specific details and audit status, as shown below. You can view filtered lists (System Views) and create your own customized views (private or shared).

You can edit hardware attributes (in order to provide more details or change information). However, if you edit an attribute, it will not be updated during future audits (you can then select to resume updates).

Components	**Details (Partial Listing)**	**Audit Date**	**Audit Status**	**Views**

Computer	Name, model number, service tag number, etc.	Snapshot of hardware Information is displayed per audit date and time	▪ C (Changed)
			▪ A (Added), or
			▪ R (Removed since previous audit)
			▪ M (Manually changed - not updated during
				▪ System Views
				  ▪ Computer Configuration
				  ▪ Computer Availability
				  ▪ Computer Information
				  ▪ Networking Information
				▪ Customized Views
				  ▪ Private
				  ▪ Shared

CPU	Serial number, processor, etc.			
Operating System	Version, service pack #, product ID, etc.			

Memory			audits)	
Memory Devices	Used and unused memory modules: device locator, e.g., DIMM_1, quantity, e.g. 2.00 GB, serial number, part number, etc.			
Drive				
Network	NIC, IP address, MAC address, etc.			
Monitor				
Keyboard				
Printer	Local and networked printers			
Video Card				
Physical Drive				

Audited Hardware Information by Computer

To View Hardware Audit Results:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer.
   You can also open a computer record by selecting it and clicking **Open Asset** in the **Tasks** pane. The Asset window displays (the window's title bar displays the asset type, such as Computer or Server).
3. Select the **Hardware** tab.
4. Click the **+** button next to the component (such as Network) to view details. Click the **--** button to collapse the list.
5. To view audit results by date, select the date and time from the **Audit Date** drop-down list.
6. Select a view from the **View** list: click the **Ellipses** button (...), then select a view from **System Views** or **Shared Views**.

See also: Customizing Hardware Audit Result Views

To Edit Hardware Attributes:

1. Enter your changes in the desired field.
2. The **Change Attribute** confirmation message displays. Click **Yes** to accept the changes.
   The audit status displays as described in the table above.

To Resume Updating Attributes If They Have Been Manually Entered:

1. Select the attribute, then select **Resume Updates**.
   The audit process will overwrite the manually entered values.

See also: Purging Audit History

Purging Audit History

If you perform audits of your computer systems on a regular basis or have owned Track-It! for many years, you may accumulate hardware data that eventually becomes outdated and of little use. This results in a larger database size and larger backups. This hardware audit data can be purged from the system to clear out old outdated information about your computer assets. When purging the audit history from a computer, Track-It! will remove all audit history results from the system and leave only the most recent audit entry for that system.

To Purge Audit History

1. On the **Inventory** grid, select the computer or computers for which you want to purge the audit history.
2. Select the **Purge Audit History** option from the **Tasks** pane.
3. On the **Purge Audit History** dialog, select one of the following:
   a. Purge audit history for the currently selected assets
   b. Purge audit history for all assets in the current grid view
   c. Purge audit history for all assets in the Inventory
4. Click **OK**.
5. The **Purge Audit History Confirmation** dialog describes the specific audit history that will be purged.

   Caution: Audit history data will be purged based on your selection.

   Click **Yes** to accept or **No** to cancel.
6. If you selected **Yes** to purge the audit data, the **Purge Audit History** message informs you that the data will be purged and will run in the background.
   In the meantime, you can continue to use the system.
   a. (*Optional*) To view the Purge Audit History status, click **View Log**.
      This opens the **Configuration > Inventory > Asset Monitor > Automated Schedule** panel in the **Administration Console**.
      Click **OK** to return to the **Inventory** grid
      OR
   b. Click **OK** to return to the **Inventory** grid.

Customizing Hardware Audit Result Views

You can create your own customized views (private or shared) of hardware audit results.

To Customize Hardware Audit Results Views:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer.
   You can also open a computer record by selecting it and clicking **Open Asset** in the **Tasks** pane.

The **Asset** window displays (the window's title bar displays the asset type, such as Computer or Server).

3. Select the **Hardware** tab.
4. Click the **Ellipses** button (...) next to the **View** drop-down list.
5. Right click and select **Edit current view**.
6. On the **Hardware Attribute View Configuration** dialog, enter a name for the customized view.
7. Select an option from the **View Type** drop-down list (Public or Private).
8. Click the **+** button next to the component (such as Network) to view details.
9. Click the checkbox next to the attribute you want to view.
   You can also click the **Select All** or **Clear All** buttons.
10. Click the **OK** button.
11. The customized view displays on the **Hardware** tab.

Tracking Items

Tracking Items for an Asset (Overview)

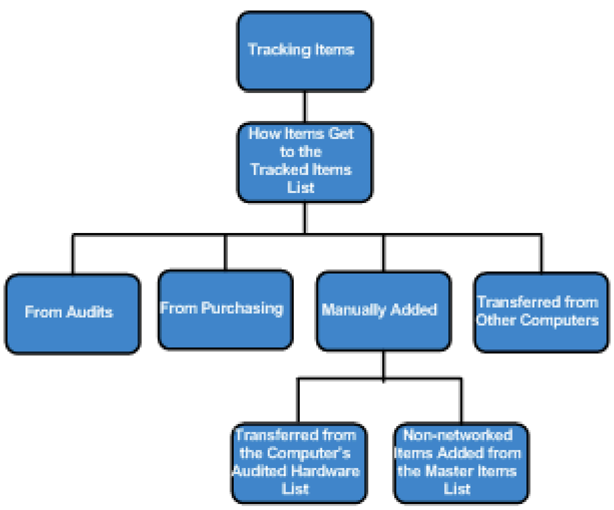
Track-It enables you to maintain a customizable Tracked Items list of items that are installed on, purchased for, or located with a specific asset. (The list is displayed on the **Tracked Items** tab of the **Asset** window in the **Inventory** module). This list is useful because you can create your own list on the Tracked Items tab separate from the items on the Hardware and Software tabs, which might contain hundreds of items, as a result of the auditing process.

See the related topics in this chapter accessed from the workflow diagram (see Tracking Items Workflow).

Next Topic: Tracking Items for an Asset (Workflow)

Tracking Items for an Asset (Workflow)

The flowchart below represents the tasks in the following topics.



Next Topic: How Items Get to an Asset's Tracked Items List

How Items Get to an Asset's Tracked Items List

The Tracked Items list for each asset, e.g., computer, is populated by the following processes:

- Auditing

        - In addition to displaying audit results on the **Hardware** and **Software** tabs on the **Asset** window, the audit process automatically updates the **Tracked Items** list for the computer with the following hardware and software information:
            - Hardware
                - Computer's make, model, service tag and manufacturer
            - Software
                - Operating system's version, serial number, and service pack level
                - Registered software (from the ProductID and DisplayName keys in the Uninstall key in the registry)
- Purchasing
    - An item on a purchase order is received in Unassigned Equipment, then transferred to a computer
- Transferred from another computer
- Manually added (hardware items only)

Viewing Tracked Items for an Asset

The Tracked Items list is a customizable list of items that are installed on, purchased for, or located with a specific asset. (The list is displayed on the **Tracked Items** tab of the **Asset** window in the **Inventory** module). See also How Items Get to the Tracked Items List and other topics in the Tracking Items chapter.

To View Tracked Items:

1. Select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the asset.
3. On the **Asset** window (usually Computer or Server), select the **Tracked Items** tab.

    - The following information automatically displays from the auditing process:
        - Hardware
            - Computer's make, model, service tag and manufacturer
        - Software
            - Operating system's version, serial number, and service pack level
            - Registered software (from the ProductID and DisplayName keys in the Uninstall key in the registry)

See also: Showing and Hiding Columns in Creating User-defined Views.

Next Topic: Transferring an Asset's Hardware Items to the Tracked Items List

Transferring an Asset's Hardware Items to the Tracked Items List

Certain installed hardware items automatically display on a computer's Tracked Items list from the auditing process, specifically the computer's make, model, service tag and manufacturer.

Once you add the items to the Tracked Items list, you can also add details on the **Tracked Item** dialog (see the table below). Some of this information is pre-populated from the auditing process, purchase orders, and information manually entered if the tracked item was transferred from another computer.

To Transfer an Asset's Hardware Items to the Tracked Items List:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer.
3. To add hardware, select the **Hardware** tab.
   (To view all items, click the **+** button next to the component, such as Computer).

4. Right click the item you want to add, then select **Transfer to Tracked Items**.
5. On the **Tracked Item** dialog, you can add information in the fields below (if they are not already populated).
6. When you are finished entering information, click the **Save** button.
   The item displays on the **Tracked Item** dialog.

General	
	Product Description
	Product Type
	Serial Number
	Manufacturer
	Part number
	Installed by
	Date Installed
	Comments
Purchase and Lease	
	P.O. Number
	Date Purchased
	Vendor
	Price
	Lease Number
	Lease Expiration Date
	Lease Vendor
	Lease Price
Maintenance and Warranty	
	Maintenance Expiration date
	Maintenance Vendor
	Reference Number
	Maintenance Cost
	Warranty Expiration Date
User Defined Fields	
	Custom Decimal #1 (decimals can be entered)
	Custom Integer #1 (only whole numbers can be entered)
	Custom Date #1
	Custom Date #2
	Custom Text #1
	Custom Text #2

Tracked Item Dialog -- Item Details

Next Topic: Manually Adding an item to an Asset's Tracked Items List

Manually Adding Non-networked Items to an Asset's Tracked Items List

You may have items in physical inventory that are not connected to a network, but you'd like to track them along with a specific asset. Once the items are created on the Master Items list, you can manually add them from the **Asset** window in the **Inventory** module.

To Manually Add an Item to an Asset's Tracked Items List:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the **Inventory** grid, double-click any Asset.

3. Select the **Tracked Items** tab on the left pane, then click the **Add** button.
4. Double click the item from the **Master Item Listing** dialog (or select it, then click the **Select** button).
   The item displays on the asset's **Tracked Items** tab.
5. On the **Tracked Item** dialog, you can add information in the fields below (if they are not already populated).
6. When you are finished entering information, click the **Save** button.
   The item displays on the **Tracked Item** dialog.

Next Topic: Deleting Items from an Asset's Tracked Items List

Deleting Items from an Asset's Tracked Items List

Deleting an item from the Tracked Items list does not delete it from Inventory -- it only deletes it from the Tracked Items tab of the asset (computer). If the item is installed on the specific computer, upon subsequent audits it might re-display in the Tracked Items list, especially if you permanently delete it from the list. (This depends on the type of item -- see How Items Get to the Tracked Items List). See step 7 below to permanently deleted the item from Inventory.

If you want to continue tracking the item, but not on the selected computer, before you delete the item from the Tracked Items list, you might want to consider transferring it to another computer or to Unassigned Equipment (see Storing Items in the Unassigned Equipment List.)

To Delete an Item from the Tracked Items List:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. In the grid view, double-click the computer.
3. On the **Asset** window (usually Computer or Server), select the **Tracked Items** tab.
4. On the **Tracked Item** dialog, select the item to delete, then press the **Delete** key (or right click and select **Delete**).
5. Click Yes on the **Delete Tracked Item** confirmation dialog.
   The item is removed from the **Tracked Item** list.
6. Click the **Save** button on the **Asset** window.

To Restore an Item to the Tracked Items List:

1. Right click anywhere in the **Tracked Items** list, then select **View deleted tracked items**.
2. On the **Deleted Tracked Items** dialog, select the item to restore, then click the **Restore** button.
   The item is restored to the **Tracked Item** list.
3. Click the **Close** button.
4. Click the **Save** button on the **Asset** window.

To Permanently Delete an Item from Inventory:

1. Follow the steps above in **"To Delete the Tracked Item from the Tracked Items List"**.
2. Right click anywhere in the **Tracked Items** list, then select **View deleted tracked items**.
3. On the **Deleted Tracked Items** dialog, select the item to delete, then click the **Delete** button.
4. Click **Yes** on the **Delete Tracked Item** confirmation dialog.
   The item is permanently removed from Inventory.
5. Click the **Close** button.
6. Click the **Save** button on the **Asset** window.

Taking Control of a User's Computer

You can diagnose and resolve a user's problem from a remote location from the **Take Control** button on the Inventory module Tasks pane or from a Work Order with an assigned computer in the Help Desk module. During a remote control session, a technician can do anything (in real-time) at the remote computer that the user can do.

Important Notes:

- In order for the Remote Control components to install when taking control of the host computers:
  - File and Printer sharing must be enabled on the host computers
  - Credentials of a user that is a local administrator on all remote machines (usually a domain administrator) must be entered in the Administration Console under Configuration >Inventory > Auditing > Setup Credentials.
- By default, the BMC Remote solution does not have access security policies enabled preventing an unauthorized BMC Track-It! technician from remote controlling a PC running the Host module. Please see the security guide in the BMC Remote Control 9.5 User's Guide, available in PDF format on our Support Web page, for a complete and comprehensive list of options when configuring the appropriate level of end- to- end access.

Notes:

- BMC Remote is available as an add-on to BMC Track-It!.
- For detailed instructions, please see the BMC Remote Control 9.5 User's Guide, available in PDF format on our Support Web page.

Using BMC Track-It! Remote, technicians can:

- Control Windows client computers
- Reboot client computers
- Execute programs
- Chat with users
- Transfer files to and from remote computers
- View remote control status histories
- Configure the remote control window
- Set remote control security on remote computers
- Troubleshoot problems via a remote control session

To Take Control of a User's Computer:

From the Inventory Module

1. Select the user's computer on the Inventory grid of the Inventory module.
2. Click the **Take Control** link on the **Tasks** pane.
   The BMC Remote Host application is installed on the user's computer. The user's screen displays on your monitor.
3. For help with remote control, right click the remote control icon on your Windows system tray. Select **Help** from the menu bar of the remote control application.

From the Help Desk Module

1. From a Work Order in the **Help Desk** module, make sure the computer displays in the **Asset** field.
2. From the **Actions** menu on the Work Order, select **Take Control** (or click the **Take Control** icon on the toolbar).
3. See step 3, above.

Retiring Assets

Retiring Assets

If you no longer need to audit an asset, but still want it to remain in Inventory, you can retire it. Retiring an asset frees up a BMC Track-It! licenses for audits, remote control, and software license management. If you're using the Bar Code add-on, it also removes the asset from any barcode scans. Retiring an asset also disassociates any assets with users. Retired Assets can be viewed from the Retired Assets from on the Inventory grid, and on the Retired Assets report. (They no longer appear in any other lists or reports.)

When you retire an asset, you can also decide whether to transfer any of its tracked items to Unassigned Equipment. You may want to do this if you are tracking a particular item, such as a printer or software, so you can reassign it to another asset from the Unassigned Equipment list.

Note: Retired an asset is irreversible. Once an asset is retired, in order to audit it, you would have to add it back to inventory via asset discovery or manually adding the asset. (See Adding Assets to Inventory - Overview).

Retired Assets will remain in the BMC Track-It! database until you're ready to delete them.
To Retire an Asset:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.
2. Right click the asset (or multiple assets at a time) from the Inventory grid and select **Retire**. (You can also retire an asset after opening the asset record.)
   If the asset has any tracked items, they display on the **Retire Asset(s)** dialog.
3. If you want to transfer any of the tracked items to **Unassigned Equipment** when the asset is retired, select the checkbox for each Tracked Item. (You can also click the Select All button to select all tracked items, or the Clear All button to deselect them.)

   Transferring the tracked items to "Unassigned Equipment" enables you to reassign them to another asset.
   Tracked items not transferred to "Unassigned Equipment" will be read-only.

4. Verify the date and time you want to use to retire the asset from the Select Retire Date drop-down (this displays a calendar).

   By default, the current date and time are selected. However, you can select a past or future date. This information will display on the Retired Assets report.

5. Click the **OK** button to retire the assets.

   A Retire Assets confirmation dialog displays confirming that you want to retire the asset or assets, and that this is not a reversible action.

6. Click the **Yes** button when the confirmation message displays.

   The asset is removed from Inventory.
7. To view a list of Retired Assets and the Retired Assets report, see Viewing Retired Assets.

Next topic: Viewing Retired Assets

See also: Tracking Items for an Asset (Overview), Storing Items in the Unassigned Equipment List, and Deleting Assets.

Viewing Retired Assets

You can view a list of Retired Assets and details from the Inventory module. You can also view a Retired Asset report. The list of Retire Assets is displayed in the Inventory grid (Inventory module) from the All Retired Assets view. For detailed information on working with grid views, see Viewing Information in Grids).
To View Retired Assets:

1. If the **Inventory** module is not already open, select **Inventory** from the **Navigation Pane**.

2. Select **System Views** from the **Current View** menu at the top of the grid (or from the **View** menu in the **Main Menu Bar**), then select **All Retired Assets**.
   The Retired Assets display in the grid.
3. To view read-only details, select the Retired Asset, then press the Enter key (or double-click the Asset).

   The Asset record opens. The retired date and time display on the window title (e.g., "Retired on 7/31/2011 3:57:04 PM").

   The Tracked Items tab displays any tracked items associated to the asset that were not transferred to Unassigned Equipment. The Audit Trail tab displays the asset's history.

Viewing the Retired Assets Report

To View the Retired Assets Report:

1. Select **Reports** from the **Navigation Pane**.
2. Select the **Inventory** module from the **Reports by Module** drop-down list.
3. Select the report: **All Retired Assets by Date Retired**.
4. Select the **All Retired Assets by Date Retired** report, then press the **Enter** key (or double click the report).

   The report displays in the Crystal Reports XI viewer.
   The following information is displayed on the report:
   - Asset ID
   - Asset Name
   - Asset Type Name
   - Retired Date (the date selected by the Technician who retired the asset)
   - Retired by (Technician's name)

   For more information on viewing and printing reports, see Viewing Reports.

Viewing and Printing Inventory Reports

Note: Technicians will only be able to view the report details for those they are privileged to view (based on Module, Location, Department, and Assigned Technician as set up by the BMC Track-It! Administrator).

You can view and print the following Inventory Reports:

- All Retired Assets by Date Retired
- Asset Configurations by Department
- Assets by Asset ID
- Assets by Domain
- Assets by IP Address
- Assets by Operating System Build
- Assets by Serial Number
- Audit Changes
- Audited Asset Configurations by Asset ID
- Audited Assets
- Audited Assets Ranked by CPU Speed
- Audited Assets Ranked by CPU Speed

- Audited Assets Ranked by Installed RAM
- Audited Assets Ranked by Installed RAM
- Audited Components Listing
- Audited Software by Asset ID
- Audited Software by Manufacturer
- Audited Software by Product
- Company Bar Coded Assets by Location
- Discovered Assets
- Free Disk Space Warning
- Installed Files Listing
- Installed Network Printers
- Listing of Equipment by Lease Expiration
- Listing of Equipment by Maintenance Expiration
- Listing of Equipment by Warranty Expiration
- Listing of Equipment not Under Warranty/Maintenance
- Software Counts by Application File Name
- Tracked Combined Inventory Components
- Tracked Inventory by Asset ID
- Tracked Software by Product
- Unassigned Equipment
- Unidentified Software List by Asset ID
- Workstations by Department
- Workstations Not Ready for Windows Vista
- Workstations Not Recommended for Windows Vista

To View Inventory Reports:

1. Select the **Reports** module from the **Navigation** pane.
2. Select **Inventory** from the **Reports by Module** drop-down list above the Reports grid.
3. Double click the report you want to view.

See Also: Reports Overview

Managing Software Licenses

Software License Management Module Overview

The Software License Management module enables you to manage software license usage and compliance within your organization.

Note: The Software license Management module integrates with the Inventory, Help Desk, and Purchasing modules, and requires initial configuration.

Integration with the Inventory Module

During the audit process, the Inventory and Software license Management modules are automatically updated with any software and files found on networked computers.

Once computers are audited, the following information, as well as additional detailed information, is displayed in the Software License Management module:

- Software Title
- Description
- Versions
- Publisher
- licenses

- Number of
  - Licenses Owned
  - Licenses Used
  - Active or Retired Licenses
  - Fully or Partially Assigned Licenses
- Details on
  - Licensed or Unlicensed Usage (software title installed per Computer)
  - Upgraded and Renewed Licenses
- Individual License Details
  - e.g. serial numbers, activation keys, and expiration dates

Note: Lookup Tables must be set up in the Administration Console for the above information to display.

Integration with the Help Desk Module

BMC Track-It! can also automatically create Work Orders when software license conditions change. This includes unauthorized installations, license expiration, pending expirations, over-utilizations licenses, and other conditions. Track-It Administrators can set up the work order generation in the Administration Console (see Generating Work Orders When Software License Conditions Change in the Administrator's Guide).

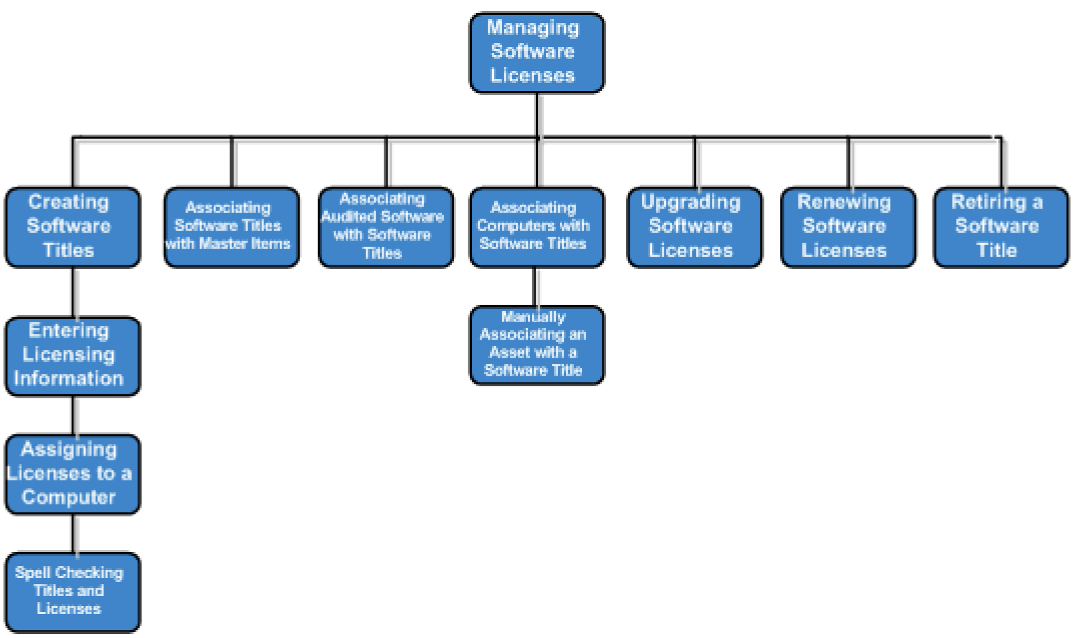
Integration with the Purchasing Module

When purchase orders for software are created and entered in the Purchasing module, BMC Track-It! automatically populates the Software License Management module with the names and number of licenses purchased.

Next Topic: Software License Management Workflow (Administrator's Guide) or Software License Management Workflow (Technician's Guide)

Software License Management Workflow (Technician)

The flowchart below represents the tasks in the following topics.



Follow the steps below to manage your software licenses:

1. Create the Software Title

- Create the software title in the Software License Management module.

2. Associate the Software Title with an Item on the Master Items List

- The association automatically creates licenses for the software title when you purchase and receive the software item and record the details in the **Purchasing** module.

3. Discover Your IT Assets

- We recommend that you first discover your assets using Track-It's Asset Discovery process. Once the assets are discovered, you can transfer the computers to Inventory.

4. Audit Your Network

After discovering your assets, you'll need to audit the workstations to update and view software programs and files installed on the networked computers. You can audit the computers via Audit on Demand, Scheduled Audits and Auditing Standalone Workstations.

1.
- Audit on Demand and Scheduled Audits automatically merge and update the inventory information. If you audit standalone workstations, you'll need to manually merge the information so that your inventory information is updated.
- If you are not using Scheduled Audits, you should audit your workstations on a regular basis to ensure that you have the most updated information.

5. Associate Audited Software (Programs and Files) with Software Titles

Associate the audited programs or files with a software title (such as Microsoft Word with Microsoft Office Professional).

6. Assign Licenses to a Computer

- The Assets tab of the Software Title window displays a list of all of the computers with the installed software. You can select the appropriate software license from the list (from information entered when the software title was created, such as the serial number).

7. Other Licensing Tasks

Once a software title is licensed, you can perform the following licensing tasks:

- Revoke licenses (remove the license from the computer)
- Retire licenses
- Upgrade licenses
- Renew licenses

8. View Software License Reports

You can view and print the following Software reports:

1.
- Expiring License Details
- License History for Title
- Software Title Details
- Software Title Summary
- Unauthorized Titles by Asset ID

Next Topic: Creating Software Titles

Creating Software Titles and Maintaining Licensing Information

Creating Software Titles

A software title uniquely identifies software owned by your organization -- for example, Microsoft Office 2003 and Microsoft Office 2007. Once you discover and audit your IT assets, the list of audited software per computer will display in the **Software License Management** module, as well the **Inventory** module.

Note: After you create the Software Title, you should associate it with an item in the **Master Items** list. This automates the process of purchasing and tracking software licenses. The association automatically creates licenses for the software title when you purchase and receive the software item and record the details in the **Purchasing** module. See Associating Software Titles with Master Items.

To Create a Software Title:

1. Select the **Software Licensing Management** module from the left pane of the **BMC Track-It! Technician Client** window.
2. Select **New Title** from the **Tasks** pane.
3. On the **Software Title** window, enter the **Title Name** (such as BMC Track-It!) and select or enter the **Publisher** (such as BMC Software, Inc.) in the designated fields.
   The following fields display values once the Licenses tab (next topic) is completed:
   - Licenses Owned
   - Licenses Assigned
   - Assets without a License
   - Status

   Once you have saved the software title record and audited your network, the Programs and Files tab will display the software associated with the software title that was found on your network.
4. Click the **Save** button.

Next Topic: Entering Licensing Information for Software Titles

Entering Licensing Information for Software Titles

To Enter Licensing Information for Software Titles:

1. Select the **Software Licensing Management** module from the left pane of the **BMC Track-It! Technician Client** window.
2. Open the software title from the **Software Titles** list.
3. Click the **Add** button on the **Licenses** tab.
4. On the **Software License** dialog, enter the following information in the designated fields (in the header section):

   - **License Description**
   - **Serial Number**
   - **Activation Key**
   - **Licenses Owned**
   - **Expiration Date**
   - The **Status** field automatically displays Active until it is changed.
5. On the **General** tab, select the **License Type** from the **Classification** section.
   Examples of License Types are Single, Site, or OEM.
6. Select or enter the **License Source** from the drop-down list.
   This may be OEM or Publisher, for example.
7. In the **Additional Information** section, select or enter the **Department** that owns the software license and department's **Location** in the appropriate fields.
   The **License Origination** field automatically displays Original, Upgrade, or Renew (see Upgrading and Renewing licenses).
8. If you use the Purchasing module to track your purchase orders,
   a. Select the P.O. number, Date Purchased, and Vendor from the designated fields in the

Purchasing Information section.
If you do not use the Purchasing module, you can manually enter this information.

9. Click the **Save** button.

Next Topic: Assigning Licenses to a Computer

Assigning Licenses to a Computer

The Assets tab of the Software Title window displays a list of all of the computers with the installed software associated to a software title. You can select the appropriate software license from the list (from information entered when the software title was created, such as the serial number).
To Access the Computers with the Software Licenses Installed:

1. Select the **Software Licensing Management** module from the left pane of the **BMC Track-It! Technician Client** window.
2. Open the software title from the **Software Titles** list.
3. Select the **Assets** tab.

To View Assets (computers) with and without licenses:

1. Select one of the following options from the **Asset View** drop-down list:
   - All Assets
   - Assets without a License
   - Licensed Assets

To Assign a License to a Computer:

1. On the Asset tab of the Software Title window, select the Asset, then click the **Assign License** button.
2. Select the License from the **License Listing** dialog.
3. Click the **Save** button on the Software Title window.

To Revoke a License from a Computer:

1. Select the Asset, then click the **Revoke License** button.
2. Select Yes on the confirmation dialog.
3. Click the **Save** button.

Spell Checking Software Titles and Licenses

You can spell check software titles and licenses when they are entered on the **Software Title** window. You can check spelling as you enter text, or wait until you click the Save button, then the Spelling dialog will display.
To Spell Check Software Titles and Licenses:

1. After entering the Title Name or License Name place the cursor in either text box, then press the **F7** key.
2. The **Spelling** dialog displays and works like any word processing application spell check tools.
3. After you've made any necessary changes, click **OK** on the confirmation dialog indicating that the spell check is complete.
4. Click the **Save** button on the **Software Title** window.

Associating Software Titles with Master Items

If you want to track software licenses with Purchase Orders, when you are setting up the Software License Management module, you'll need to associate the software titles in the **Software License Management** module with items in the **Master Items** list. (The Master Items list is a customized catalog of common items you'll be purchasing and/or adding to inventory). Associating a software title with an item in the Master Items list automates the process of purchasing and tracking software licenses. The association automatically creates licenses for the software title when you purchase and receive the software item and record the details in the **Purchasing** module.

To Associate a Software Title with a Master Item:

1. Select **Administration Console** from the **Tools** menu on the main menu bar.
2. In the **Administration Console**, select **Lookup Tables/ Inventory/Master Items**.
3. On the **Master Items** panel, double click the item to edit it (or select it and click the **Select** button).
   The **Master Item** dialog displays.
4. Click the **Add** button on the **Software** tab.
5. Select the software title you want to associate with the item from the **Title Listing** dialog.
6. The software title displays on the **Master Item** dialog. Click the **Save** button.
7. Click Yes on the **Confirm Update Related Records** dialog.
8. Click the **Apply** button to save your changes, and the **OK** button to close the window.

Now when you receive the software item in the **Purchasing** module, you can choose to create a single license for each item received or a bundled license (each item received will create a new license containing your specified number of licenses in the bundle). For detailed information, see Receiving Purchased Items into Inventory. The licenses will display on the Software title dialog in the **Software License Management** module and on the **license** tab of the **Purchase Order** window.

Associating Audited Software with Software Titles

Once you have created the software title, you'll need to associate it with the related audited programs or files for which you want to track licenses. For example, you would associate Microsoft Word with Microsoft Office Professional.

You can add audited programs or files to a software title either from the **Software Licensing Module**, or from the **Administration Console.**

Note: Only audited programs and files that have **not** been associated to a software title will display on the Installed Programs list accessed from the **Software Licensing Module**.

To Associate an Audited Program with a Software Title (in the Software License Management module):

1. Select the **Software Licensing Management** module from the left pane of the **BMC Track-It! Technician Client** window.
2. Select the **Software Title**.
   If you don't see the Software title, change the filtered list (**View** drop-down list) to another approval status (for example, to Unidentified).
3. On the **Programs** tab or **Files** tab of the **Software Title** window, click the **Add** button.
4. On the **Installed Programs** dialog or **Installed Files** dialog, double click to select the program or file to associate with the software title, **OR**
   Select the program or file and click the **Select** button.
   The program displays on the **Programs** tab of the **Software Title** window.
5. Click the **Save** button.

To Associate an Audited Program with a Software Title (in the Administration Console):

1. In the **Administration Console**, select **Administration** from the **Lookup Tables** section.
2. Select **Installed Programs** or **Installed Files** from the **Administration** section.
3. On the **Installed Programs** or **Installed Files** dialog, double click to select the program to associate with the software title, **OR**
   Select the program and click the **Associate** button.
   Note: You may have to enlarge the Administration Console window to see the **Associate** button.

4. Select the Software Title from the **Title Listing** dialog.
5. The program displays on the **Programs** tab or **Files** tab of the **Software Title** window.
6. Click the **Save** button.

To Change the Audited Software's Status (from Unidentified to Approved, Permitted, or Alerts):
See Changing the Audited Software Approval Status

To Remove an Audited Program or File from a Software Title:

1. Select the **Software Licensing Management** module from the left pane of the **BMC Track-It! Technician Client** window.
2. Select the Software Title.
3. On the **Programs** tab or **Files** tab of the **Software Title** window, select the program to remove and click the **Remove** button.
   The program is removed from the **Programs** tab or **Files** tab.
4. Click the **Save** button.

Upgrading, Renewing, and Retiring Software Titles

Upgrading Software licenses

You can track software license upgrades and view details, by software title, of licenses owned and assigned of original and upgraded software. When you upgrade a software license (for example, from Crystal Reports 9 to "XI"), BMC Track-It! creates a new license record with the updated license details that you specify. The previous license is retired. You can view the both records from the All licenses view (see below).

1. Select the **Software Licensing Management** module from the left pane of the **BMC Track-It! Technician Client** window.
2. Open the software title from the **Software Titles** list.
3. Select the **Licenses** tab.
4. Select the license you want to upgrade, then select **Upgrade License** from the **Actions** button.
5. On the **Upgrade License** dialog, enter a **new license description** for the portion of the current license you want to upgrade.
   Enter enough information so that the upgraded license description can be differentiated from the original license. An example of the upgraded license is: "Crystal Reports XI Upgrade for J. Smith and R. Jones".
6. Select or enter the number of licenses to upgrade from the **Upgrade Count** field.
7. If you are upgrading only some of the licenses, click the **Select Assets** button.
8. On the **Asset Listing** dialog, select the assets that will be assigned to the licenses, then click the **Save** button.
9. Click the **Save** button on the **Upgrade License** dialog.

The License tab of the Software License dialog displays the number of Licenses Owned, Licenses Assigned, and Assets without a License for the software license.
Example (Upgrading Crystal Reports 9 to Version XI)

The following is an example of changes that occur when a software license is upgraded:

If You Upgrade:		**Licenses Owned**	**Licenses Assigned**
Less than Total # of Licenses Owned		Version 9 is decreased and Version XI is increased by the number of upgraded licenses	Version 9 Licenses are removed from the selected computers and Version XI licenses are assigned to them
Example	23 licenses owned of current version. Only two users need new version's functionality.	Version 9: 21 (2 licenses are retired) Version XI: 2	Computer 1 and 2: Version XI Computers 3 - 23: Version 9
More than Total # of Licenses		Version 9 is decreased to 0 and Version XI is increased by the number of upgraded licenses	Assets are assigned to the new license automatically.
Example	25 users need new version's functionality	Version 9: 0 (23 licenses are retired) Version XI: 25	Computers 1-25: Version XI
Same # of Licenses		Version 9 is decreased to 0 and Version XI is increased by the number of upgraded licenses	Assets are assigned to the new license automatically.
Example	23 users need new version's functionality.	Version 9: 0 (23 licenses are retired) Version XI: 23	Computers 1-23: Version XI

Renewing Software Licenses

If an expiration date has been added for a license and the license has expired, you can renew the license.

When you renew a license, the following changes occur:

- The old license record is retired
- A new license record is created with the updated license details

To Renew a Software License:

1. Select the **Software Licensing Management** module from **Navigation Pane**.
2. Open the software title from the **Software Titles** grid.
3. Select the **Licenses** tab.
4. Select the license you want to upgrade, then select **Renew License** from the **Actions** button.

5. On the **Renew License** dialog, enter a new license description for the portion of the current license you want to renew (in the **Renew License** field).
6. Enter the number of licenses you want to renew in the **Renew Count** field.
7. If you are only renewing some of the licenses:
   a. Enter the number of licenses, then click the **Select Assets** button.
   b. On the **Asset Listing** dialog, select the asset or assets, then click the **Select** button.
8. Click the **Save** button on the **Renew License** dialog.

Retiring a Software Title

A software title may become obsolete and you may not want to track it any longer. You can then retire the title.

Note: Retiring a software title also deletes any associated software licenses for that title.
To Retire a Software Title:

1. Select the **Software Licensing Management** module from the left pane of the **BMC Track-It! Technician Client** window.
2. Select the software title, then select Retire Title from the Tasks pane.
3. Click **Yes** on the confirmation dialog indicating that the associated licenses will be deleted.

BMC Track-It! Bar Code Solution

Getting Started with the Track-It! Bar Code Solution

How Bar Coding Can Help You Track Assets

The BMC Track-It! Bar Code solution complements the Discovery and Inventory features of Track-It!, providing the added benefit of enabling you to track your company's IT assets using bar codes, increasing productivity by expediting data entry and reducing errors during physical audits.

While BMC Track-It! can automatically discover your networked IT assets, the Bar Code Solution solves managing inventory that is not connected to a network. By scanning bar codes, you can quickly add other assets to Inventory in BMC Track-It! such as newly received assets, non-networked assets, or anything else you want to track.

If you have already been using BMC Track-It! to audit your computers, for example, you can scan the computers' Company Asset Tags as well as other bar code labels such as serial numbers. Then you can use the **Asset Reconciliation - Bar Code** window to match the scanned computers with those already inventoried in BMC Track-It!

BMC Track-It! Bar Code Workflow

Click the link above for details on how to add bar code records to BMC Track-It! with a bar code device.

Reports

Administrators can view and print the **Company Bar Coded Assets by Location** report (see Viewing Bar Code Reports).

Next Topic:

Navigating the Track-It! Bar Code Device Application

BMC Track-It! Bar Code Workflow

Adding Bar Code Records to BMC Track-It! with a Bar Code Device

Follow the steps below to add bar code records to BMC Track-It! using your bar code device (click each step for detailed instructions):

1. Update your bar code device with BMC Track-It! lookup tables (synchronizing with BMC Track-It!*).
2. Scan your bar coded assets and select attributes.
3. View and/or edit scanned bar code assets on the device.
4. Update BMC Track-It! with scanned bar code records (Synchronizing with BMC Track-It!*)
5. Manage bar coded assets in BMC Track-It!
    a. Transfer bar coded assets to Inventory
    b. Compare bar coded assets to existing Inventory (optional)
    c. Manually Matching Bar Coded Assets with Unmatched Inventoried Assets (optional)

* Synchronizing your bar code device with BMC Track-It! simultaneously updates the device with BMC Track-It! Lookup Tables and updates BMC Track-It! with scanned bar code records.

Please see the **BMC Track-It! Bar Code solution** chapter for additional topics (under Inventory in the table of contents of the BMC Track-It! Technician's Guide).

Remote Technicians

If you are a remote technician with a bar code device but no access to BMC Track-It!, you can use the import/export feature. See Importing/Exporting Bar Code Data.

Next Topic:
Navigating the BMC Track-It! Bar Code Device Application

Using the Bar Code Device

Navigating the BMC Track-It! Bar Code Device Application

To Start the BMC Track-It! Bar Code Application:

1. On your bar code device, select **Start > All Programs > BMC Track-It!**.

    The BMC Track-It! Bar Code device application has three main screens:

- **Main Menu**
    - From here you can start scanning bar codes, view scanned bar codes, or view the About screen.
    - The About screen displays:
        - BMC Track-It! Bar Code version number
        - Build number
        - Device ID
        - BMC Software's Web site: www.numarasoftware.com
        - Sales telephone number: (800) 557-6970
- **Scan Asset Screen**
    - From here you can scan bar codes.

- **Scanned Asset List Screen**
  - From here you can find, view, edit, and delete scanned bar code records.
  - You can also import and export bar code records with a BMC Track-It! technician if you are at a remote location without the BMC Track-It! application.

Next Topic:
Synchronizing Your Bar Code Device with BMC Track-It!

Synchronizing Your Bar Code Device with BMC Track-It!

Synchronizing your bar code device with BMC Track-It! simultaneously updates the device with BMC Track-It! lookup tables and updates BMC Track-It! with scanned bar code records.

When you synchronize your bar code device with BMC Track-It! before you begin a scanning session, the following lookup table values for the four fields on the device are updated:

- Departments
- Locations
- Users
- Asset Types

When you're finished scanning bar coded assets, synchronizing also retrieves the scanned bar code data from the device and updates the Manage Bar Coded Assets window in BMC Track-It!.

To Synchronize Your Bar Code Device with BMC Track-It!:

1. Connect your bar code device to the computer where BMC Track-It! is installed.
2. Select **Manage Bar Coded Assets** from the **Tools** menu on BMC Track-It!'s main menu bar.

   - You can also access the window from the **Manage Bar Coded Assets** link on the **Assets** window of the **Inventory** module, or from the **Bar Coded Assets** link on the **Assets Summary** section of BMC Track-It!'s home page.

3. Click **Synchronize my device** from the **Bar Code** section of the task pane on the right of the window.
4. The **Transfer Progress** dialog displays while lookup table data from BMC Track-It! is transferred to the device and scanned bar code records are transferred to BMC Track-It!.
5. Click **OK** when the dialog displays that synchronization is complete.

When the bar code synchronization is complete, the bar code records on the bar code device are removed.

Canceling Synchronization

If you click the Cancel button before synchronization is complete, the bar code records are removed from BMC Track-It! and restored to the bar code device.

Next Topic:
Scanning Bar Codes and Selecting Attributes or Managing Bar Coded Assets

Scanning Bar Codes and Selecting Attributes

You can scan up to two bar code labels for each asset (the Company Asset Tag and the manufacturer's Serial Number). You can also manually enter the Company Asset Tag and Serial Number using the soft keyboard on your bar code device. After you scan the bar codes, then you can select attributes for the asset (Department, Location, User, and Asset

Type).

After you've scanned the bar codes, you can view the scanned bar code records on the Scanned Asset List screen.

To Scan Bar Codes:

1. Start **BMC Track-It! Bar Code** on your bar code device by selecting **Start > All Programs > BMC Track-It!.**
2. Selected the **Scan Asset** icon from the **Main Menu**.
3. Scan or enter the Company Asset Tag (bar code label) on the asset. The **Asset Tag** field in BMC Track-It! Bar Code displays the scanned value, and is a required field.
4. Scan or enter the Serial Number (bar code label) on the asset (if available). The value is displayed in the **Serial number** field.
5. Select values from any of the following drop-down lists to associate the asset with an attribute:
   - **Dept (Department)**
   - **Location**
   - **User**
   - **Asset Type**

   If the value is not listed (e.g. User Name) even though you've synchronized the device, ask your BMC Track-It! administrator to update the lookup tables in BMC Track-It!.

   If you make a mistake, you can edit individual fields, or select the **Clear All** button. This will clear all of the fields on the screen so that you can re-scan the bar codes.

6. When you are finished entering data for an asset, select the **Submit** button.

   This increases the Records count at the top of the screen and clears the screen to enable a new scan. The lookup table fields are retained so that you can quickly scan and enter assets with similar attributes.

7. When you are finished scanning bar codes for this session, press the **Done** button.

   The screen closes and the scanned bar code assets display on the **Scanned Asset List** screen.

Next Step: Viewing and Editing Scanned Bar Code Assets on the Device

Viewing and Editing Scanned Bar Code Assets on the Device

The Scanned Asset List Screen displays a list of the scanned assets currently on the device. From this list, you can find, delete, edit, or enter new bar code assets.
To View Scanned Bar Code Records:

1. Start **BMC Track-It! Bar Code** on your bar code device by selecting **Start > All Programs > BMC Track-It!.**
2. Select the **Scanned Asset List** icon from the Main Menu (the screen automatically displays once you've selected the Done button after scanning bar codes).

   To Find Bar Code Records:

3. Select one of the attributes (e.g. from the drop-down list next to the Find button.

To Edit Bar Code Records:

1. Select the bar code record, then select the **Edit** button. The **Scan Asset** screen displays opens and displays the selected record.
2. Edit the records by selecting the appropriate field and entering the new information.
3. When you are finished editing the record, select the **Submit** button, then select the **Done** button. The screen closes and the edited records display on the **Scanned Asset List** screen.

To Delete Bar Code Records:

1. Select the bar code record, then select the **Delete** button.
2. Select **Yes** when the **Delete selected item** message displays.

To return to the Scan Asset screen and scan new bar codes:

1. Select the **New** button.

Next Step:

If you are ready to update BMC Track-It! with the scanned bar code records, see Synchronizing Your Bar Code Device with BMC Track-It!.

Related Topic:

Importing/Exporting Bar Code Data

Importing/Exporting Bar Code Data

Remote technicians who do not have access to BMC Track-It! can import and export bar code data through their bar code devices so that the BMC Track-It! technician can manage bar coded assets, even from remote locations.

Important Note: There is a separate installer for the remote BMC Track-It! Bar Code application. See page 4 of the Track-It! Bar Code Installation Guide (PDF format).

Steps to Import and Export Bar Code Data

Click each step to view detailed instructions.

BMC Track-It! Technician	Remote Technician
1. *E-mail the Track-It! Bar Code device application to the remote technician.* a. Navigate to the following folder on your computer: `\\Program Files\BMC Software\Track-It! Bar Code`. b. Copy the file **TIBarCode_ToPDA.exe** and attach it to an e-mail to the remote technician. c. Send the remote technician the installation instructions on page 6 located in the Track-It! Bar Code Installation Guide (PDF format).	
2. *Export the lookup table values from BMC Track-It! to send to the device.*	

You'll need to initially export the files to your remote technician and export them whenever lookup table values are updated in Track-It! a. Navigate to `C:\Program Files\BMC Software\Track-It!\Track-It! Server\Support\`. b. Double click the file **BarCodeIO.hta** to run the Bar Code Importer/Exporter. c. Click the **Export** button on the **BMC Bar Code Importer/Exporter** dialog. d. Click the **Open Results Folder** button to view the exported files. e. The lookup table files are exported to the **To_Devices** folder: C:\Documents and Settings\Administrator.ServerName\MyDocuments\BMCBarcode**To_Devices.** f. Click the **Close** button (**X**) to exit the **BMC Bar Code Importer/Exporter** dialog. There are four files that contain the values for the lookup tables: 1. ▪ S01F03.txt (Departments) ▪ S01F04.txt (Locations) ▪ S01F05.txt (Users) ▪ S01F06.txt (Asset Types) Each time the files are exported, the To_Devices folder is updated automatically.	
3. *E-mail the exported lookup table files to the remote technician.* a. Navigate to the following folder on your computer:C:\DocumentsandSettings\Administrator.ServerName\MyDocuments\BMCBarcode**To_Devices.** b. Copy the four files in the **To_Devices** folder and attach them to an e-mail to the remote technician. The text files contain values for the following attributes: ▪ S01F03.txt (Departments) ▪ S01F04.txt (Locations) ▪ S01F05.txt (Users) ▪ S01F06.txt (Asset Types) c. Send the remote technician the instructions on importing the files (in Step 5 under Remote technician, below).	

	4. *Install Track-It! Bar Code on the bar code device.* See the installation instructions on page 6 located in the Track-It! Bar Code Installation Guide (PDF format).
	5. *Synchronize the device by importing the lookup table values.* a. Copy the four lookup table values received from the BMC Track-It! Technician (e.g.S01F03.txt) to the **For_Import** folder in the following directory: `Windows Explorer: [Computer Name]\Mobile Device\My Documents\Track-It\Data`. b. Start **Track-It! Bar Code** by selecting **Start Programs Track-It!**. c. Selected the **Scanned Asset List** icon from the **Main Menu**. d. Select **File Import Data** from the **Scanned Asset List** screen. A message displays that the four data files were imported. If a message displays that no files were found for the import, make sure that the files were copied to the For_Import folder in step 1, above. After importing, Track-It! Bar Code renames the imported files to old_[file_name], e.g. old_S01F03.txt, to indicate that they have already been imported.
	6. *After scanning the assets, e xport the bar code data from the device.* a. Make sure the bar code device is connected to the computer, and start **Track-It! Bar Code** by selecting **Start Programs Track-It!**. b. Select the **Scanned Asset List** icon from the **Main Menu**.

	c. Select **File Export Data** from the **Scanned Asset List** screen. A message displays indicating that the file was exported to the Mobile Device folder: `\\My Documents\Track-It\Data\`**`Exported.`**
	7. *E-mail the exported bar code data files to the BMC Track-It! technician.* a. Navigate to the following folder on your computer: `Windows Explorer:[Computer Name]\Mobile Device\My Documents\Track-It\Data\Exported.` b. Move the file in the **Exported** folder (e.g., S01_data.txt) and attach it to an e-mail to the BMC Track-It! Technician.
8. *Import the bar code data into BMC Track-It!* **Important Note:** If you have received bar code data files from multiple remote devices, you will need to rename the files (e.g. S02_data.txt) for each device. a. Copy the file (e.g., S01_data.txt) received from the remote technician to the following folder: C:\Documents and Settings\Administrator.ServerName\MyDocuments\BMCBarcode**From_Devices**. b. Navigate to: `\\Program Files\BMC Software\Track-It!\Track-It! Server\Support\.` c. Double click the file **BarCodeIO.hta** to run the Bar Code Importer/Exporter. d. Click the **Import** button. e. Click **Yes** when the message displays asking you to confirm merging the file from the From_Devices folder. (If you click **Cancel**, the text file remains in the From_Devices folder). f. Click the **Close** button to exit the Importer/Exporter. The bar code data in the text file is imported. The data consists of the	

following attributes for each scanned bar code asset: 7. ▪ Company Asset Tag ▪ Serial Number ▪ Department ▪ Location ▪ User ▪ Asset Type ▪ Timestamp ▪ Batch ID ▪ Device ID ▪ Item ID Once you import the files, Track-It! renames them and moves them into the **Previously_Imported** folder (e.g. 09062006161710141.S01_data.txt). (The file name represents the date/time stamp when the file was imported into Track-It!). The bar code assets will now display on the Manage Bar Coded Assets window in Track-It! after refreshing the screen (clicking Apply or closing and opening the window).	

Next Topic:

Managing Bar Coded Assets

Managing Bar Coded Assets in BMC Track-It!

Managing Bar Coded Assets in Track-It! (Overview)

After bar coded assets have been scanned and the bar code device has been synchronized with BMC Track-It!, the system compares the scanned assets with those already existing in Inventory. The list of scanned assets displays on the tabs on the **Asset Reconciliation - Bar Code** window as **New**, **Matched**, **Missing**, and **Ignored**.

Note:

- In order to manage bar coded assets, technicians and other users must have full access rights to the Inventory module (see Restricting Privileges by Module in the Administrator's Guide).
- Only one user at a time may access the **Asset Reconciliation - Bar Code** window.

The Bar Code assets' scan results are described below:

<table>
<tr><th>Tabs</th><th>Bar Code Assets Scan Results</th><th>Management Options</th></tr>
<tr><td>New</td><td>Assets that do not have an associated Inventory record (the Company Asset Tag and Serial Number cannot be found in any of the existing inventoried assets).</td><td>Add to Inventory
The bar coded asset is merged with the inventoried asset and displays in the Inventory module.
Skip
Since there may be a large amounts of new assets to work with, Skip enables you to differentiate the asset while you manage others. When you finish working with the bar code assets and return to the Asset Reconciliation - Bar Code window, bar code assets with the Skip designation will be reset to their previous state (such as Add to Inventory).
Delete scan
Removes the asset from the New tab. You might want to remove an asset from the list, for example, if the wrong attributes (user, location, or department) were selected on the bar code device when the asset was scanned.
Match to existing asset
Enables you to manually match a bar coded asset with an unmatched inventoried asset.</td></tr>
<tr><td>Matched</td><td>Assets with a matching Inventory record (based on Company Asset Tag and/or Serial Number.

Displayed by:
Probable Matches
Changes
No Changes</td><td>Accept
Skip
Match to another asset
Unlink scan and asset</td></tr>
</table>

Missing	Assets that have not been found in a scan during a specified period. Displayed by: • Previously Scanned • Assets that Have Never Been Scanned	• Skip • Always ignore asset • Remove from inventory
Ignored	Assets that have been designated by a Technician as Ignored because they don't need to be tracked at this time. Can display: Ignored Assets Ignored Scanned Devices	• Skip • Resume Updates

Next Topic: Viewing Bar Code Assets

Viewing Bar Code Assets

The list of scanned assets displays on the tabs on the **Asset Reconciliation - Bar Code** window as **New**, **Matched**, **Missing**, and **Ignored**.
To Access the Asset Reconciliation - Bar Code Window:

1. Select **Asset Reconciliation - Bar Code** from the **Tools** menu on the main menu bar.

   You can also access the window from the **Tasks** pane of the **Inventory** module, or from the **Asset Summary** section of the home page.

Tabs

1. The **New** tab displays. To view the list of New Assets by groups (Department, Location, or Batch ID), select an option from the **Group reconciliation by:** drop-down list.

Groups

1. To **show asset types in groups**, click the designated checkbox. The assets will be grouped by asset type, such as computer, printer, or router.

Grid and Columns

The **New** tab grid is split into two panes (**Discovered Assets and Inventory**), separated by a gray vertical border, with columns displaying for each pane.

1. To view the columns for each pane, drag the gray vertical border between **Discovered Assets** and **Inventory** to the right or left (you may need to expand the window horizontally to see more

columns).

2. To display or hide columns, right click in the **Discovered Assets** or **Inventory** grid, then select **Customize**. For detailed instructions on viewing columns, see Creating User-defined Views.

Next Topic: Adding Bar Coded Assets to Inventory

Adding Bar Coded Assets to Inventory

Typically, when you install BMC Track-It!, the Discovery process finds networked assets, such as computers, and automatically adds them to Inventory. With the BMC Track-It! Bar Code solution, you can also add scanned bar coded assets into Inventory (which merges with an inventoried asset or creates a new asset).

After the bar codes have been scanned, BMC Track-It! displays the scanned bar coded records on the **Asset Reconciliation - Bar Code** window. From here you can add the assets to Inventory.

What Happens in Inventory When you Add a Bar Coded Asset?

Once you add bar coded assets, the following changes are applied, depending on the match type:

Bar Code Assets Scan Results	Inventory Module Result
New Assets	▪ When you select **Add to Inventory** for an asset, the bar coded asset is removed from **New** tab of the Bar Coded Assets list and an inventory record is created, which displays in the **Inventory** module (see Viewing Asset Information). ▪ See also Manually Matching Bar Coded Assets to Existing Inventory).
Matched Assets	**Note:** When you add a matched asset to existing inventory, the inventoried asset's values will be replaced with those from the matched asset. However, if any of the matched asset's values are blank, the existing asset's values will be retained. ▪ When you select **Accept** for an asset, the bar coded asset is removed from the Bar Coded Assets list on the **Matched** tab of the **Asset Reconciliation - Bar Code** window. ▪ The bar coded asset is merged with the inventoried asset and displays in the **Inventory** module (see Viewing Asset Information).

To Add Bar Coded Assets to Inventory:

1. Select **Asset Reconciliation - Bar Code** from the **Tools** menu on the main menu bar.
2. Select an asset from the **New** tab on the **Asset Reconciliation - Bar Code** window, then select **Add to Inventory** from the **Actions** column.

You can also right click the asset and select **Add to Inventory**.

To view bar coded assets added to Inventory, see Viewing and Editing Assets.

Next Topic: Manually Matching Bar Coded Assets with Unmatched Inventoried Assets

Manually Matching Bar Coded Assets with Unmatched Inventoried Assets

BMC Track-It! automatically displays scanned bar coded assets with matching Company Asset Tags and/or Serial Numbers with inventoried assets on the **Asset Reconciliation - Bar Code** window, which you can then add to Inventory). BMC Track-It! also allows you to manually match a bar coded asset with an unmatched inventoried asset.

For example, an asset exists in **Inventory** that originated from the **Purchasing** module. The Serial Number and Company Asset Tag were not previously entered. Now you've scanned the bar code on the asset, and you want to match it to it's inventory record.

Note:

When you match an asset to existing inventory, the existing asset's values will be replaced with those from the bar coded asset. However, if any of the bar coded asset's values are blank, the existing asset's values will be retained.

To Manually Match Bar Coded Assets to Unmatched Existing Inventory Records:

1. Select **Asset Reconciliation - Bar Code** from the **Tools** menu on the main menu bar.
2. Select an asset from the **New** tab on the **Asset Reconciliation - Bar Code** window, then select **Match to existing asset** from the **Actions** column.
   You can also right click the asset and select **Match to existing asset**.
3. The **Search** dialog displays. Enter the first four characters of the Asset Name or Asset ID in the **Search for:** field, then click the **Search** button.
4. Click the inventoried asset to be matched from the search results, then click the **Select** button.

   The asset is removed from the **New** tab and matched with the inventory record.

If you want to unlink a bar code scan from an asset, see Unlinking a Bar Code Scan from an Asset.

To view bar coded assets matched with **Inventory**, see Viewing and Editing Assets.

Next Topic: Unlinking a Bar Code Scan from an Asset

Unlinking a Bar Code Scan from an Asset

If you find that an incorrect Company Asset Tag has been applied to an inventoried asset, you can unlink the bar code scan from the asset. You may need to unlink them, for example, if a bar coded asset has been incorrectly matched to an inventoried asset (see Manually Matching Bar Coded Assets to Existing Inventory).

To Unlink a Bar Code Scan from an Asset:

1. Select **Asset Reconciliation - Bar Code** from the **Tools** menu on the main menu bar.
2. Select an asset from the **Matched** tab on the **Asset Reconciliation - Bar Code** window, then select **Unlink scan and asset** from the **Actions** column.
3. You can also right click the asset and select **Unlink scan and asset**.

The inventoried asset remains on the **Assets** window in **Inventory**, and the Company Asset Tag is removed.

See also: Deleting Assets and Copying an Asset.

Next Topic: Viewing Bar Code Reports

Viewing Bar Code Reports

The **Company Bar Coded Assets by Location** report displays assets scanned vs. not scanned bar coded assets per location (based on scanned assets associated with an inventory record). See Creating and Editing Reports for more information, including report customization. An example of report details is displayed below:

5/11/06 3:25:00PM							
Location	**Co. Asset Tag**	**Asset Type**	**Name**	**Serial No.**	**Department**	**User**	**Last Scar Date**
Receiving							
		Computer	Computer1	C12345B6789	Engineering	John Smith	5/10/
	P23456	Printer	Printer1	P2345678901	Finance	Anne Brown	5/10/
Total Scanned: 1			*Total Not Scanned:* 1				
Engineering							
		Computer	Computer1	C12345B6789	Engineering	John Smith	5/11/
		Computer	Printer1	P2345678901	Finance	Anne Brown	5/11/
Total Not Scanned: 1			*Total Not Scanned:* 1				

Company Bar Coded Assets by Location Report (Example)

To View a Bar Code Report:

1. Select **Reports** from the **Navigation Pane**.
2. Select **Inventory** from the **Reports by Module** drop-down list.
3. Select the **Company Bar Coded Assets by Location** report.

See also Printing Inventory Reports.

Next Topic:
Managing Bar Code Licenses

Managing Bar Code Licenses

Your BMC Track-It! Bar Code solution license includes the ability to use three bar code devices to scan and synchronize bar code data into the BMC Track-It! application. If you plan on using more than three bar code devices for synchronization, you can obtain additional licenses through the BMC Track-It! Support Center, or by calling your BMC Track-It! sales representative. (See Maintaining Registration Support and Licenses in the Administrator's Guide). You can also view the status of your Bar Code Device licenses from the **Asset Reconciliation - Bar Code** window.

Next Topic:
Viewing Bar Code Transaction History (Database)

Viewing Bar Code Transaction History (Database)

The AssetTagCaptureLog table in your BMC Track-It! database displays the following information:

- AssetTagCaptureLogID
- Divide ID

- DeviceAssignedBatchID (Date and Time)
- DeviceAssignedItemID
- CompanyAssetUniqueID
- CreateDate
- SerialNumber
- DataCaptureDate
- LocationID
- AssetTypeId (Added, Modified, or Rejected)
- USERID
- DEPT_ID

Next Topic:
Troubleshooting Bar Coding

Troubleshooting Bar Coding

Problem

Cannot access the Bar Code features in BMC Track-It!:

- Another user has feature open.
- The user does not have full rights to the Inventory module, Locations, and Departments.

Managing IT Assets with BMC Track-It! Web

In addition to BMC Track-It! Technician Client, you can use BMC Track-It! Web to manage IT assets When you're back at your desk, you can manage any of the assets you created or edited in BMC Track-It! Web from the BMC Track-It! Technician Client.

Note: Online help is available once you log in to BMC Track-It! Web (and is separate from the BMC Track-It! Technician Client online help). The topics in the online help are also available in the BMC Track-It! Web Technician's Guide (PDF) on the Product Documentation section of our Support Web page
To Access BMC Track-It! Web:

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

   The **BMC Track-It! Web** home page displays.

Help Desk: Managing Your Work Orders

Help Desk Overview

The **Help Desk** module is designed to track IT related issues (such as problems with hardware or software, networking, or telecommunications) and requests for services (such as installations, purchases, and training).

Note: Certain Help Desk features are add-on modules, such as BMC Remote See the BMC Track-It! Add-ons on our Web site

How the Help Desk Module Can Help You Manage Your Work Orders

The following is a brief description of the Help Desk module features. See the topics in this chapter for detailed information and instructions. See also: Managing Work Orders Workflow.

View and Find Work Orders Details

When you open the Help Desk module, the Work Order grid displays. You can view all of the Work Orders from the Work Order grid. There are several pre-defined system views (such as My Open Work Orders). The default grid view displays information such as the Work Order Type, Priority, Date Entered, Summary, and Due Date.

You can sort, filter, and group records in a grid, and create user-defined views. You can also export and import views, and print and export grid contents.

You can search for Work Orders and Work Order details with the full-text search feature, including all fields associated with Work Orders.

View Work Order Audit Trail

BMC Track-It! automatically tracks and displays technician and system activity for a Work Order so you can monitor changes through its lifecycle.

Document Work Orders

Documenting a Work Order is quick and easy due to drop-down lists on the Work Order window. When you create a Work Order and select the Requestor's name, information is automatically displayed such as the User's contact information, department and location. (The Users' list is updated by the BMC Track-It! Directory Importer which imports and synchronizes users from your Directory Service -- see Directory Importer Overview in the Administrator's Guide). You can also edit and view user details directly from the Work Order, and view the Requestor's work order history.

The Help Desk module interfaces with the Training module to display the user's course history. Integration with the Inventory module enables you to view the user's associated assets and audit information, including the asset's Work Order history.

Once you enter a brief summary of the issue or request, then you can quickly classify and prioritize it with drop-down Work Order Types. You can add detailed, categorized descriptions and notes, including private notes not visible to end uses using the Self Service application. If more documentation is needed, you can attach files to Work Orders.

Automatically Convert E-Mails to Work Orders
The E-mail Monitor can be set up to automatically create work orders from e-mail requests so that they are sent to your help desk e-mail account.

Create Work Order Templates and Copy of Work Orders
You can save data entry time when documenting recurrent issues by creating Work Orders from templates and by copying Work Orders.

Automatically Assign Work Orders based on Specific Skill Sets
Skill Routing Work Order Policies can be set up so that Work Orders are automatically assigned to particular Technicians based on specific criteria, such as the Work Order Type.

Set up Service Level Agreements (SLAs)
Service Level Agreements can be set up and associated with Work Order Event Policies.

Set up Work Order Event Policies
Work Order Event Policies can be set up to notify a Technician or Technician Group when certain events occur with Work Orders matching certain criteria. Work Orders can be escalated to another technician if the work is not completed on time.

Set up Help Desk Hours
Help desk Operating Hours can be set up for automatic calculation of due dates and to determine when Work Order notifications are sent.

Create Work Order Assignments
If there is a complex Work Order that requires multiple tasks by various Technicians. Assignments can be added for each Technician and task.

Automatically Calculate Due Dates
Work Orders can be associated with Work Order Event Policies and Service Level Agreements (SLAs). If so, the Work Order's due date is automatically calculated.

Use Custom Fields
Your BMC Track-It! Administrator can set up custom fields, including custom Status fields, for Work Orders specific to your organization.

E-mail Work Order Details to Requestors and Technicians
You can e-mail Work Order details to Requestors and Technicians that contain pre-populated information, such as the Work Order number, Summary, Description, and Status.

Set up Work Order Status Updates
Work Order Status Updates can be set up so that BMC Track-It! can automatically respond to users when they send e-mails requesting the status of a Work Order.

Print Work Orders and Print/Export Work Order Grid Contents
You can print Work Orders and print or export Work Order grids.

Create Solutions from Work Order Resolutions and Work Order Resolutions from Solutions
The Solutions module enables Technicians to maintain a database of solutions to common work order issues. If you have resolved a common Work Order issue, you can add the resolution to the Solutions module. You can also insert a Solution directly into a Work Order as the Resolution.

Track Work Order Time and Cost (Hours and Charges)
An hourly charge can be set up per Technician and/or Technician Group, which is automatically calculated when you enter your hours.

Document Work Order Resolutions
Enables you to describe exactly how you solved the problem, helping you and other technicians in similar situations.

Generate Reports
Administrators and Technicians with permissions to view Reports can view Help Desk reports from the Help Desk or Reports modules. (Technicians will only be able to view the report details for those they are privileged to view (based on Module, Location, Department, and Assigned Technician as set up by the BMC Track-It! Administrator).

View Help Desk Metrics with the Dashboard

Administrators and technicians with permissions to view the Dashboard module can view Key Performance Indicators (KPIs) in the form of graphs (bar and pie charts) and pivot grids (interactive tables).

Next Topic: Managing Work Orders Workflow

Creating announcements

Administrators and Technicians can create announcements that can be viewed on the BMC Track-It! Home Page by Technicians (and end users if necessary). You can post multiple announcements and set an expiration date and time for each announcement. You can also format the text using HTML markup.

Note: You can create new announcements and delete them; however, they can't be edited. It's best to create the text in a text editor, save it, then paste the text into the **Announcement** dialog.
To Create an Announcement:

1. Select **Home Page** from the **Navigation Pane**.
2. Click the **Add Announcements** link in the **Announcements** panel.
3. On the **Announcement** dialog, select or enter the date and time for the announcement to expire in the **Announcement Expiration** field.
4. Type the announcement in the **Announcement** text box.
   If you want to format the text using HTML (font color, marquee, and other attributes), see below.
5. If you want end users to be able to view the announcement (in addition to technicians), check the **Visible in Self-Service** checkbox.
6. Click the **Save** button to close the dialog and post the announcement on the **Home Page**.

To Delete an Announcement:

1. On Track-It's home page, click the checkbox(es) next to the announcement(s) you want to delete.
2. Click the **Delete** link.

Text Formatting Using HTML

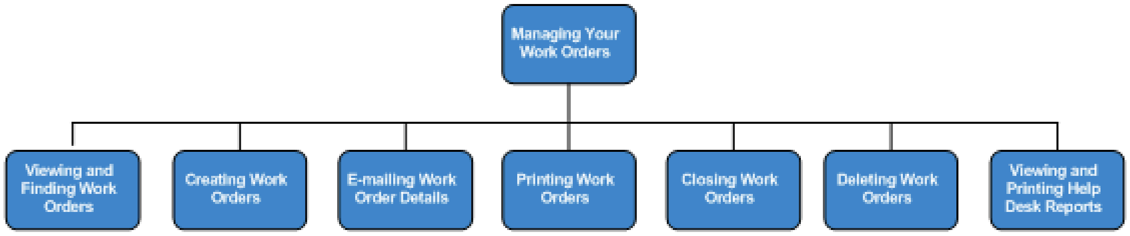
You can use HTML to format the announcement's text. Some common tags are listed below.

Format	Example	Result
Bold	<B>Good Morning</B>	**Good Morning**
Italics	<I>Good Morning</I>	*Good Morning*
Font Size	<FONT size = "2">Good Morning</FONT>	Good Morning
Font Color	<FONT color = #FF0000>Good Morning</FONT>	Good Morning
Hyperlink	<A HREF = "http://www.mywebsite.com" target = "_blank">Click Here</A>	Click Here (opens the targeted page)
Scrolling Marquee	<MARQUEE> Good Morning</MARQUEE>	Good Morning

Managing Work Orders

Managing Work Orders Workflow

The flowchart below represents the tasks in the following topics.



Viewing and Finding Work Orders, and Searching for Details

Viewing and Finding Work Orders

The list of Work Orders is displayed in the Work Order grid (Help Desk module). For detailed information on working with grid views, see Viewing Information in Grids).

Notes:

- **Change Management**: Work Orders that are associated with a Request for Change in the Change Management module can be identified by enabling the *RFC Status* column. These Work Orders will display with an RFC Status such as Approved, Rejected, or Pending Approval. You can manage the Request for Change by opening the Work Order and selecting the Change Management tab.

  To enable the **RFC Status** column, right click anywhere on the grid, then select **Customize**. In the **Customize Grid** dialog (**Columns** tab), select **RFC Status** from the list, then click the **Add** button. For more information, see Showing and Hiding_Columns.

- **System Health**: The Work Order displays in the Help Desk grid with the Work Order ID and the Summary from the System Health Monitor Log. By customizing the grid view, you can also see which Work Orders were created by the System Health Monitor by adding the "Opened by" column. For more information on System Health, see System Health Overview in the Administrator's Guide.

To View Work Orders:

1. If the **Help Desk** module is not already open, select **Help Desk** from the **Navigation Pane**.
   The **Help Desk** window displays and Work Orders are listed in the grid. You can specify which columns to view (See Creating User-defined Views). The number of records display at the bottom of the grid.

2. To view work orders using views (open, closed, overdue, etc.) select a view from the **Current View** menu at the top of the grid (or from the **View** menu in the **Main Menu Bar**).

   The name of the view displays (e.g. Current View - My Overdue Work Orders) and the records display in the grid.

3. To view work order details, double-click the Work Order in the grid that you want to view, or select the Work Order, then select **Open** in the **Tasks** pane.

   The Work Order record opens. The top pane of the Work Order window displays the most commonly-used fields to describe a Work Order: Requestor, Call Back Number, Asset, Work Order ID, Summary, Priority, and Status.

To Find Work Orders:

1. Do any of the following:

- Click **Go to Work Order** on the Help Desk **Tasks** menu
- Click the **Go to Work Order** icon on the **Help Desk** toolbar
- Select **Go to Work Order** from the **Edit** menu
- Press the **Ctrl+G** keys

2. Enter the work order number in the **Go to Work Order** dialog, then click the **OK** button.

   The Work Order detail window opens displaying the Work Order.

Customizing the Tabs Display

Additional information about the Work Order is displayed on the tabs (such as Notes, Requestor, Asset, etc.). You can select which tabs to display, and which two to display at a time.
To Customize the Tab Display:

1. Right click anywhere on either of the two tab panes, then select the check boxes of the tabs you want to display.
2. To display two tabs at once, right click the right pane (appears blank until a tab has been selected), then select a tab name.

   See Also: Viewing Information in Grids

Searching Work Order Details

The BMC Track-It! search engine supports full-text search capabilities. You can search for Work Order details (text in Work Order database fields) from the **Search** field and **Search** button on each module's toolbar.
To Search for Work Order Details:

1. Enter the search term in the **Search** field (main toolbar), then select **Work Orders** from the **Search** button drop-down.
   The **Search Work Orders** dialog opens and displays the search results.
2. The Work Orders that include your search term are displayed in the **Results** list. To view the Work Orders, double click (or right click and select **Open**).

See also: Searching for Information in BMC Track-It! and Searching for the Requestor's Name and Viewing User Information for a Work Order.

Viewing a Work Order's Requestor Information and History

You can view a Work Order's requestor information and work order history from the Requestor tab on a Work Order. You can also sort or filter the Help Desk grid by the Requestor column to view work orders associated with a specific requestor. (See Creating User-defined Grid Views.)

The **Requestor** tab of the Work Order window displays the following details in the User Information section:

User Information

- Name and Employee ID
- Title
- Location
- Department and Department Number
- Phone/Alternate Phone
- E-mail
- User Def. 1
- User Def. 2

To View Requestor Details:

1. Select the **Requestor** tab of the **Work Order** window.
   The User Information panels displays the information listed above.
2. Click the **User's Name** link to open the **Edit User** dialog to view more details.

Work Order History

Work Orders associated with the requestor display on the Work Order History grid. The grid can be customized (to display more columns, for example). (See Creating User-defined Grid Views.)

To View the Work Orders:

1. To view work order details, double-click the Work Order in the grid.

   You can also right click anywhere on the Work Order History grid to open the Work Order, or e-mail the Requestor or Technician.

Viewing a Work Order's Asset Information and History

You can view a Work Order's asset information and work order history from the Asset tab on a Work Order. You can also customize the Help Desk grid to show the Asset column to view work orders associated with assets. (See Creating User-defined Grid Views.)

The **Asset** tab of the **Work Order** window displays the following details in the **Asset Information** section:

Asset Information

- Asset Name (or Asset ID if Asset Name is blank).
- Asset ID
- Asset Type
- Location
- Department
- Department Number
- Manufacturer
- Model
- Operating System Name for asset type Computer, Service Tag for all other asset types
- Service Pack for asset type Computer, IP Address for all other asset types

To View Asset Details:

1. Select the **Asset** tab of the **Work Order** window.
   The Asset Information panel displays the information listed above.
2. Click the **Asset ID** link to open the **Asset** window to view more details.

Work Order History

Work Orders associated with the asset display on the Work Order History grid. The grid can be customized (to display more columns, for example). (See Creating User-defined Grid Views.)

To View the Work Orders:

1. To view work order details, double-click the Work Order in the grid.

   You can also right click anywhere on the Work Order History grid to open the Work Order, or e-mail the Requestor or Technician.

Viewing the Work Order Audit Trail

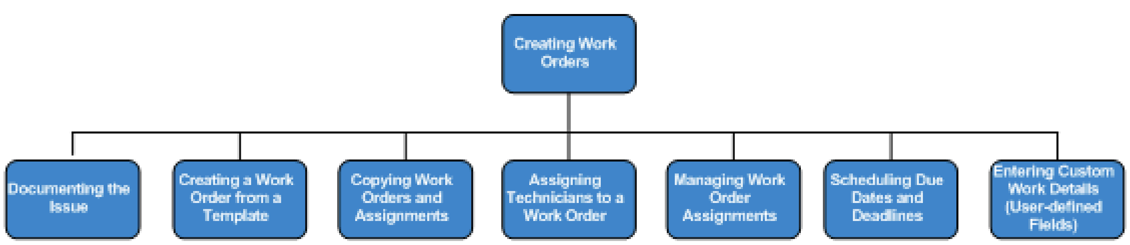
BMC Track-It! automatically tracks technician and system activity related to the Work Order and displays this information on the **Audit Trail** tab of the Work Order window. The log includes who, what, when, and where activity took place. Audit Trail information can also be used to generate reports. You can also view the Audit Trail for all Work Orders in the Administration Console (see Viewing the Help Desk Audit Trail for Work Order Changes in the Administrator's Guide).
To View a Work Order's Audit Trail:
Accessing the Work Order Window

1. Click the **Audit Trail** tab of the **Work Order** detail window.
   Activities display in reverse chronological order.
   The Audit Trail also displays information from BMC Track-It! e-mail conversation management (e-mails sent to and from Technicians, text messages sent to Technicians, and e-mails sent to and from Requestors). You can click the message link to view the message contents.

Creating Work Orders

Creating Work Orders Workflow

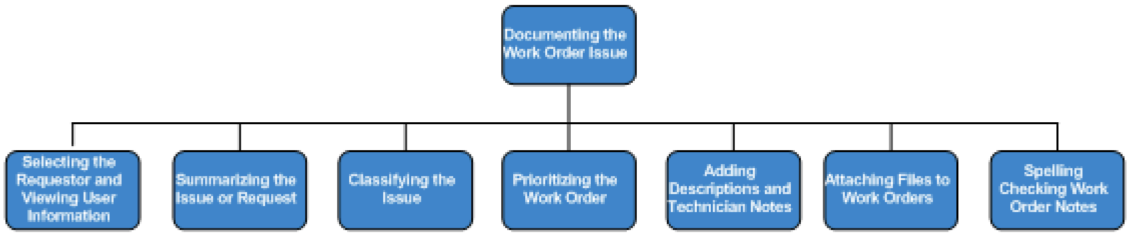
The flowchart below represents the tasks in the following topics.



Documenting the Issue

Documenting the Work Order Issue Workflow

The flowchart below represents the tasks in the following topics.



Documenting the Work Order Issue

When users contact you for assistance, you'll document the issue on the **Work Order** window in the **Help Desk** module.   The information you'll document includes:

- Requestor's contact information
- Requestor's asset information
- Summary of the issue or request
- Classification and prioritization of the issue
- Detailed descriptions and notes
- File attachments (supporting documents)

To save time, you can create a Work Order from a Template (see Creating a Work Order from a Template).

To Create a Work Order:

1. Select **New Work Order** from the **Tasks** pane in the **Help Desk** module.
   You can also click the **New** button on the toolbar, or select **File/New Work Order** or **CTRL+W**.

Next Topic: Searching for the Requestor's Name and Viewing User Information for a Work Order

Searching for the Requestor's Name and Viewing User Information for a Work Order

To enter the requestor's name on a Work Order, you can either begin entering the first name in the Requestor field, or you can use the Search dialog to either view all users' names or search for a name. As you are documenting the issue, you can view detailed information about the user (see Viewing User Information, below).   If your BMC Track-It! administrator has given you the appropriate permissions, you can add the requestor's contact information as well.

To Enter the Requestor's Name:

1. In the **Requestor** field, enter the first few letters of the requestor's name, then select it from the list if there are multiple names, **OR**
2. Select the requestor's name from the **Requestor** drop-down list.

To Search for the Requestor's Name:
Note: The **Search Requestor** dialog automatically uses a wild card search to display all records. See also Searching for Information in BMC Track-It!

1. Click the **Ellipses** (...) button next to the **Requestor** field.

2. To view all users' names, click the **Search** button, or press the **Enter** key on the **Search Requestor** dialog.
3. To search for a user, enter any part of the user's first or last name in the **Search for** text box, then press the **Enter** key or click the **Search** button.
   The search engine searches several fields, such as Full Name, Title, Phone, and Custom Text, so the results displayed will include users that with this information in their profile (see Viewing User Information, below).
4. To select the user, double click the user's name, or select the name and click the **Select** button, or press the **Enter** key.
   The **Search Requestor** dialog closes, and the user's name displays in the **Requestor** field of the **Work Order** window.

To Add a New User:
1. Click the **Add** (+) button next to the **Requestor** field.
2. Follow the instructions for the **Edit User** dialog (Editing User Properties and Manually Adding Users in the Administrator's Guide).

To Select the Requestor's Call Back Number:
1. Select the telephone number from the **Call Back Number** drop-down list.
2. If a telephone number does not display, you can enter the number in the **Call Back Number** field.
3. You can enter multiple telephone numbers. Click the **Save** button on the toolbar to save each entry.

To View User Information:
1. Once the user's name displays in the **Requestor** field, double click the name.
   The **Edit User** dialog displays, showing the assets assigned to the user. You can view additional user information on the General, Self-Service, and Graphic tabs. (See (Editing User Properties and Manually Adding Users in the Administrator's Guide).

Next Topic: Selecting the Requestor's Asset and Viewing Asset Details

Searching for the Requestor's Asset and Viewing Asset Details for a Work Order

The **Asset** drop-down list in the **Work Order** window displays the assets assigned to a user, such as computers or other networked assets found in asset discovery as well as manually added assets (non-networked assets such as DVD players). As you are documenting the issue, you can view detailed information about the specific asset (see Viewing Asset Information, below).

If a user is reporting an issue about an asset that is not displayed in the Asset drop-down list, you can search for the asset. If your BMC Track-It! administrator has given you the appropriate permissions, you can add the requestor's asset as well.

To Select the Requestor's Asset:
1. In the **Asset** field, enter the first few letters of the asset's ID, then select it from the list if there are multiple IDs, **OR**
2. Select the asset's ID from the **Asset** drop-down list.

To Search for the Asset:
1. Click the **Ellipses** (...) button next to the **Asset** field.
2. Enter the Asset ID in the **Search for** text box of the **Select User** dialog, then press the **Enter** key or click the **Search** button.
   The users' names display in the **Results** grid.

3. Double click a user's name, or select a name and click the **Select** button, or press the **Enter** key. The **Select User** dialog closes, and the user's name displays in the **Requestor** field of the **Work Order** window.

To Add the Asset:

1. Click the **Add** (+) button next to the **Asset** field.
2. Follow the instructions for the **Edit User** dialog.

   See also Associating an Asset with a User.

Viewing Asset Information:

1. Once the asset ID displays in the **Asset** field, double click the ID.
   The **Edit User** dialog displays, showing the assets assigned to the user. You can view additional user information on the General, Self-Service, and Graphic tabs.

Next Topic: Summarizing the Issue or Request

Summarizing the Work Order Issue or Request

Entering a brief summary of the issue or request enables you and other technicians to quickly locate the work order at a later time. Text entries in the Summary field display in the Work Order grid and can be sorted alphabetically or filtered by key word. You can also use the search feature to search for specific text in the Summary field. For example, a user calls and reports that they cannot send or receive e-mails. You might want to summarize by entering "Cannot send or receive e-mails from Outlook". When searching Work Orders at a later time, you can search for "e-mail", "Outlook", "send", etc.

To Summarize the Issue or Request:

1. In the **Summary** field, enter a brief description of the issue or request.

Next Topic: Classifying the Issue

Prioritizing the Work Order

You can prioritize a Work Order by defining its urgency and impact to your organization. Priority levels are set up by your Administrator and indicate the level (such as "2-Urgent"), a resolution time (such as 45 minutes), and hours of operation (7x24). An example of an organization's Work Order priorities are as follows:

1 -- Critical (30M 7x24)
2 -- Urgent (45M 7x24)
3 -- High (1H)
4 -- Medium (4H)
5 -- Low (# of hours equaling one business day)
6 -- Project (No Date Due Defined)

Your Track-It! Administrator may have set up Event Policies so that when a Work Order is created, Track-It! matches the Work Order with criteria set up on the policies to determine the Work Order's Due Date and Expected Completion Date. Event Policies can be based on the following criteria:Requestor, Department, Location, Type, Subtype, Category, and Priority.
The Event Policy displays above the Due Date if one is in place for the Work Order criteria.

See Setting up Work Order Event Policies in the Administrator's Guide.

Your Track-It! Administrator may have also set up Skill Routing Policies. These are used to assign a specific Technician to Work Orders based on matching criteria (the same criteria used for Event Policies).

To Prioritize the Work Order:

1. Select an option from the **Priority** drop-down list on the **Work Order** window of the **Help Desk** module.

Next Topic: Adding Descriptions and Notes

Adding Descriptions and Technician Notes to Work Orders

In addition to the brief Summary description you can enter for a Work Order, you can add detailed Work Order descriptions and Technician Notes, including steps to reproduce the problem. Technician Notes can be marked Private so that they can only be viewed by other technicians (and not by end users when Work Order information is e-mailed to them). You can categorize the Work Order Description (e.g., Original Description or Additional Information). You can also categorize the Technician Note (e.g., Research).

Notes display on the Notes panel in descending or ascending chronological order (depending on the Help Desk Journaling settings set up by your BMC Track-It! Administrator). Notes are color coded: Blue = Work Order Description; light yellow = Technician Note, and gray = e-mail conversation.

You can also use shortcut keys (such as **CTRL+Shift+N** to place the cursor in the Notes field on a Work Order).

You can edit and delete Description and Technician Notes depending on Journaling permissions set up by your BMC Track-It! Administrator.

Notes are also created from e-mails to Requestors and Technicians from Work Orders. See E-mailing Work Order Details to Requestors and Technicians.

To Add Description and Technician Notes:

1. Select the **Notes** tab on the **Work Order** window of the **Help Desk** module, OR
   Press **CTRL+Shift+N** anywhere on the Work Order details window to place the cursor in the **Notes** field of the **Notes** tab (Notes Type: **Technician Note**).
   Press **CTRL+Shift+W** anywhere on the Work Order details window to place the cursor in the **Notes** field of the **Notes** tab (Notes Type: **Work Order Description**).
2. Select **Work Order Description** from the **Type** drop-down list.
   a. Select an option from the **Activity Code** drop-down list to categorize the note (such as Additional Information or Original Description).
   b. Enter the note in the **Notes** text box.
3. Select **Technician Note** from the **Type** drop-down list.
   a. Select an option from the **Activity Code** drop-down list to categorize the note (such as Research).
   b. Enter the note in the **Notes** text box.

4. By default, the **Private** checkbox for Technician Notes is not checked. To change the note to Private so that only Technicians can view it (and not end users), click the **Private** checkbox.
5. Click the **Add Note** button (or press **CTRL+Enter**).
   The note will display in the **Notes** panel.
6. Click the **Save** button.

To Edit a Description or Note:
Note: Notes created from e-mails or text messages from Work Orders cannot be edited. Only the Private setting can be changed.

1. Click the **Edit** button on the note you want to change, **OR**
   Press the **Enter** key while the note is selected to open the **Edit Note** dialog.
2. You can change the **Activity Code** if necessary by selecting it from the drop-down list.
3. Edit the information in the **Notes** text box.
4. Check or uncheck the **Private** checkbox to change the note from Private to Public and vice versa.
5. When you're finished with the edits, click the **OK** button.
   The **Work Order** window re-displays showing your changes.

To Delete a Description or Note:

1. Click the **Delete** button on the note you want to delete in the Notes panel, **OR**
   Select the note using the arrow keys, then press the **Delete** key. Click **Yes** on the **Delete Confirmation** message.
2. Click **Yes** on the confirmation dialog to delete the note or **No** to cancel the deletion.

Next Topic: Attaching Files to Work Orders

Using Keyboard Shortcuts for Work Orders

You can use the following shortcut keys specifically designed for Work Orders:

Keyboard Key/ Key Combination	Result
CTRL+G	Opens the Go to Work Order dialog. Enter the number of the Work Order to open it.
CTRL+SHIFT+M	Opens your e-mail editor with the Work Order details (addressed to the Requestor). Edit the e-mail if desired before sending it.
CTRL+SHIFT+N	Places the cursor in the **Notes** text box of the **Notes** tab (Notes Type: **Technician Note**)
CTRL+SHIFT+W	Places the cursor in the **Notes** text box of the **Notes** tab (Notes Type: **Work Order Description**)
CTRL+SHIFT+R	Places the cursor in the **Resolution** text box of the **Resolution** tab
CTRL+ENTER	Adds the **Note** entered in the either of the **Notes** text boxes
ENTER	After selecting a saved **Note**, opens the **Edit Note** dialog
CTRL+A	Selects all text in the **Notes** or **Resolution** text boxes, as well as the **Edit Note** dialog
ESC	Closes the **Edit Note dialog. You can then choose whether to save the changes.**

See also: Adding Descriptions and Technician Notes to Work Orders, Documenting Work Order Resolutions, and Using Keyboard Shortcuts

Spell Checking Work Order Notes

You can spell check the Description and Technician Notes as well as Resolution notes.

Accessing the Work Order Window

To Spell Check Work Order Notes:

1. After entering text, click in the notes text box, then press the **F7** key**.**
2. The **Spelling** dialog displays and works like any word processing application spell check tools.
3. After you've made any necessary changes, click **OK** on the confirmation dialog indicating that the spell check is complete.

Classifying the Work Order Issue

After you have entered the Requestor's name, call back number, and summary of the issue, the next step is the classify the issue by Type, Subtype, and Category. For example, if a user reports a problem that their computer's sound card is not working, you could classify the issue by: Type (Problem), Subtype (PC Hardware), Category (Sound).

Your Track-It! Administrator sets up the classifications. The three-tiered structure (Type, Subtype, and Category) exists in a hierarchy. Each level populates the next based on the value selected in the previous level. For example, if the user is having a problem with a sound card, you would select the Subtype "PC Hardware" as the Type "Problem", and "Sound" as the Category, as shown below.

Type
Problem
Subtype
Application
Network
PC Hardware
Category
Display
Sound
UPS

Classification enables you to sort and filter the list of Work Orders (grid) so you can quickly find a Work Order by the type of issue. You can also use the search feature to search for specific text in the Type, Subtype, or Category fields.

Administrators also use classification for Skill Routing Policies (to assign specific technicians to certain types of Work Orders). (See Setting up Skill Routing Policies in the Administrator's Guide.

To Classify the Issue:

Notes:

- If your BMC Track-It! Administrator has given you the appropriate permissions, you can add values for Types, Subtypes, and Categories.
-

1. Select the **Classification and Schedule** tab on the **Work Order** window of the **Help Desk** module.
2. In the **Classification and Schedule** section, select an option from the **Type** drop-down list. Once you select the Type, the Subtype and Category values will change, based on the Type.
3. Select an option from the **Subtype** drop-down list.
4. Select an option from the **Category** drop-down list.
5. Click the **Save** button on the toolbar.

Next Topic: Prioritizing the Work Order

Assigning Technicians to a Work Order

Your BMC Track-It! Administrator may have set up Skill Routing Work Order Policies so that Work Orders are automatically assigned to particular Technicians based on specific criteria, such as the Work Order Type. For example, all Networking Work Orders would be automatically assigned to the Networking Group or Individual Technician, and all Desktop Work Orders to another group or Technician. (The Applicable Policies section on the **Classification and Schedule** tab on the **Work Order** window displays the name of the Skill Routing policy, if one is in place.) However, if your Administrator has given you the necessary permissions, you can assign or re-assign a Technician to Work Order. See Setting up Skill Routing Policies in the Administrator's Guide.

To Assign a Technician to a Work Order:

1. Select the **Classification and Schedule** tab on the **Work Order** window of the **Help Desk** module.
2. In the **Classification and Schedule** section, select a Technician from the **Technician Assigned** drop-down list.
3. Click the **Save** button.

To Change Technicians in a Work Order:

1. From the **Classification and Schedule** tab on the Work Order, select the Technician from the **Assigned Technician** drop-down list.

   If a Skill Routing policy is in place, as indicated on the **Applicable Policies** section, and the Assigned Technician does not match the Designated Technician based on the applicable Skill Routing Policy, an information icon next to the Technician's name will display.

2. Click the **Save** button

To Change Technicians from the Help Desk Grid

1. From the **Help Desk** grid, select the Work Order, then
   a. Select the **Change Technician** link on the **Tasks** pane, OR
   b. Right click and select **Change Technician** from the context menu.

2. The **Assign Technician** dialog displays.
   a. Double click the **Technician's** Name in the grid, OR
   b. Select a **Technician** from the list and click the **Select** button, OR

c. Enter the **Technician's** first or last name in the **Search for:** field and press the Enter key (or click the **Search** button), then click the **Select** button.

To Reset the Skill Routing Policy's Designated Technician as the Work Order's Assigned Technician:

1. Click the **Apply** button in the **Applicable Policies** section.
2. Click the **Save** button

Scheduling Work Order Due Dates and Times

Some Work Orders are associated with Work Order Event Policies and Service Level Agreements (SLAs). If so, the Work Order's due date is automatically calculated and displayed in the **Due Date** field. (This is displayed on the **Classification and Schedule** tab of the Work Order under **Applicable Policies**). You cannot edit the Due Date, but you can edit the Expected Completion Date.

To Schedule a Work Order's Due Date and Time:

1. Select the **Classification and Schedule** tab on the **Work Order** window of the **Help Desk** module.
2. In the **Classification and Schedule** section, click the drop-down arrow of the **Expected Completion Date** field and select a date from the calendar.
   (You can also enter the date in the Due Date field without using the calendar.) The calendar closes and the selected date displays.
3. Click the **Save** button.

See also: Setting up Event Policies and Setting up Service Level Agreements (SLAs)

Entering Custom Work Order Details (Custom Fields)

Your BMC Track-It! Administrator can set up custom fields for Work Orders specific to your organization. These fields display on the Classification and Schedule tab of the Help Desk module. By default, the fields are labeled Lookup 1 through 6, Text 1 and 2, and Date 1 and 2. Your Administrator can change the labels, so they will display according to your organization's specifications.
To Enter Custom Work Order Details:

1. Select the **Classification and Schedule** tab from the **Work Order** window.
2. Enter the custom work order details in the **Custom Fields** section.
3. Click the **Save** button.

Attaching Files to Work Orders

You can add files to Work Orders, such as text files, documents, or images. You can also rename and delete file attachments.

Accessing the Work Order Window

To View Work Order Attachments:

1. Right click the file on the **Attachments** tab, then select **Open**.

Tip: You can customize the grid view and add the **# of Attachments** column to quickly view which records have attachments. See Showing and Hiding Columns in the Creating User-defined Views topic.

To Attach a File to a Work Order:

1. Select the **Attachments** tab on the **Work Order** window of the **Help Desk** module.
2. Click the **Add** button.
3. In the **Open Attachment** dialog, navigate to the location of the file, then double click it, or select it and click the **Open** button.
   The file displays on the **Attachments** tab on the **Work Order** window.
4. Click the **Save** button.

To Rename a File Attachment:

1. Right click the file on the **Attachments** tab, then select **Rename**.

To Delete a File Attachment from a Work Order:

1. Select the file on the **Attachments** tab, then press the **Delete** key. Click **Yes** on the **Delete Attachment(s)** confirmation dialog.
2. Click the **Save** button on the **Work Order** window.

To Sort the List of Attachments:

1. Click the column header (e.g. "Name").

To Change the Grid View of the List of Attachments:

1. Right click anywhere on the **Attachments** tab, then select **View**.
2. Select an option from the View menu (Text Only, Wrap Text, Auto Arrange).

Next topic: Spell Checking the Work Order

Managing Work Order Assignments

Adding Assignments to Work Orders

If you have a complex Work Order that requires multiple tasks by various Technicians, you can add Assignments for each Technician and task. For example, you might create a Work Order with Assignments as follows:

WORK ORDER/ASSIGNMENTS	**TASKS**	**TECHNICIAN**
Work Order #1	Set up new hire workstation	Mike (Lead Technician)
Assignment #1	Set up hardware/software	John
Assignment #2	Set up network and passwords	Elizabeth
Assignment #3	Set up telephone	David

Assignments are set up on the **Assignments** tab of the **Work order** window. The Assignments form (window) and the Work order form are identical (with the exception of the Assignments tab on the Work Order form). You can easily track the status of each Technician's Assignments by viewing them on the Assignments tab of the parent Work Order, or by viewing the individual Assignments from the Work Order grid view.

A message displays when the last open Assignment is closed to inform you that the parent Work Order can be closed.

In addition to adding Assignments from the Assignments tab for a specific Work Order, you can also create Assignments separately, then associate them to Work Orders. See Re-associating Assignments to Work Orders.

You can also promote (convert) a Work Order Assignment to a Work Order, which disassociates it from the parent Work Order. See Promoting Assignments to Work Orders.

Tip: You can filter, group, and sort the columns on the Work Order grid so that you can view which Work Orders have Assignments, status of each Work Order and Assignment, Technicians assigned, etc.
To Add an Assignment to a Work Order:

1. Open the specific Work Order from the **Work Order** grid of the **Help Desk** module.
2. Select the **Assignments** tab on the **Work Order** window, then click the **Add** button.
3. Complete the **Assignments** form as you would for the **Work Order** form, then click the **Save** button.
   The Assignment title bar displays the Assignment ID number.
   Tip: You can view the Parent work order by clicking the arrow next to the **ID** field on the **Assignments** window
4. When you close the **Assignment** window, the **Assignments** tab on the **Work Order** window displays a grid of all of its Assignments in descending chronological order.

To View Assignments on a Work Order:

1. Select the **Assignments** tab on the **Work Order** window.

   The Assignments display in a grid. You can customize the grid as you would for the Help Desk grid (the available fields are the same). For more information, see step 3 in Showing and Hiding Columns in Creating User-defined Views.

To Delete Assignments from a Work Order:

1. Select the Assignment from the **Assignments** tab on the **Work Order** window, then click the **Delete** icon (X).
2. Click OK when the **Delete Work Orders** confirmation message displays.

Next Topic: Assigning Work Orders (Converting Work Orders to Assignments)

See Also: Copying Work Orders and Assignments

Assigning Work Orders (Converting Work Orders to Assignments)

You can convert Work Orders to Assignments by assigning them to other Work Orders. This is useful, for example, if there are several Work Orders or Assignments that are actually sub tasks of a specific parent Work Order.

Notes:

- You cannot assign an open Work Order to a closed one, nor can you associate an assignment to another assignment.

Accessing the Work Order Window
To Assign Work Orders:

1. Select the Assignment (or Work Order) from the **Work Order** grid of the **Help Desk** module.
2. Click the **Assign to Work Order** hyperlink on the **Tasks** pane, **OR**
   Right click and select **Assign to Work Order**.
3. On the **Assign to Work Order** dialog, search for the Work Order by ID or keyword.
   For more information on searching, see Searching for Information.
4. Select the desired Work Order, then click the **Select** button.
   The **Assign to Work Order** dialog closes and the **Work Order** grid displays.

Closing Work Order Assignments

Essentially, the steps to close a Work Order Assignment are the same as closing stand-alone Work Orders. However, all Assignments must be closed before the Work Order can be closed.

Refer to the following topics on completing Work Orders:

- Closing Work Orders Overview
- Closing Work Orders
- Reopening Closed Work Orders

> **Note:** You cannot reopen a closed Assignment if the parent Work Order is closed. You can reopen the parent Work Order, then reopen the Assignment.

Notes:

- If you attempt to close a Work Order without closing its Assignments, the **Close Open Assignments** confirmation dialog will display asking if you want the Assignment(s) to be closed automatically. If you select Yes, the **Close Open Assignments** confirmation dialog displays. Select Yes to complete the Assignment(s).

Promoting Assignments to Work Orders

You can promote (convert) a Work Order Assignment to a Work Order, which disassociates it from the parent Work Order.

To Promote an Assignment to a Work Order:

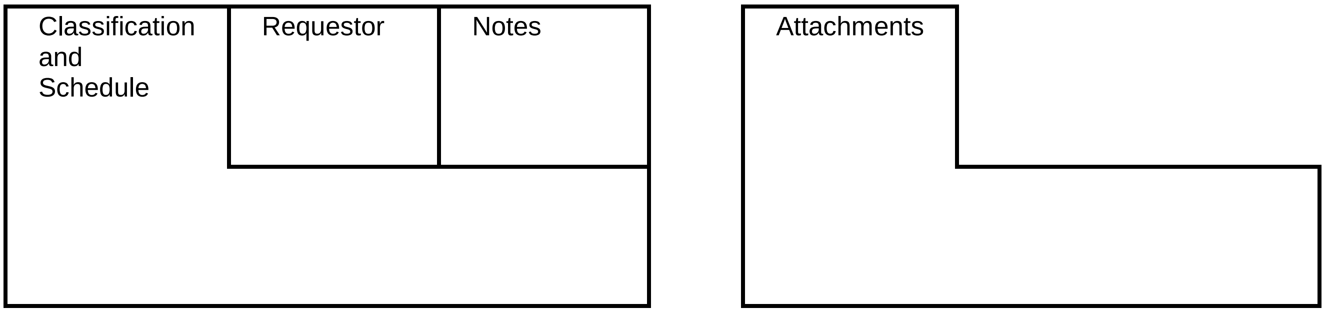
1. Select the Assignment from the **Work Order** grid of the **Help Desk** module.
2. Click **Promote Assignment** on the **Tasks** pane, **OR**
   Click the **Promote Assignment** icon on the toolbar, **OR**
   Right click and select **Promote Assignment.**
3. Click **Yes** on the confirmation dialog.

   The Assignment is converted to a Work Order, and the Work Order detail window opens. The title bar displays the Work Order number. An entry displays in the Audit trail tab for the new Work Order that the Assignment was promoted. The Assignment is removed from the Assignments tab of the parent Work Order. The Audit Trail tab for the parent Work Order also shows that the Assignment was promoted. Any hours and charges for parent Work Order will change appropriately.

Saving Tab Layouts for Work Orders

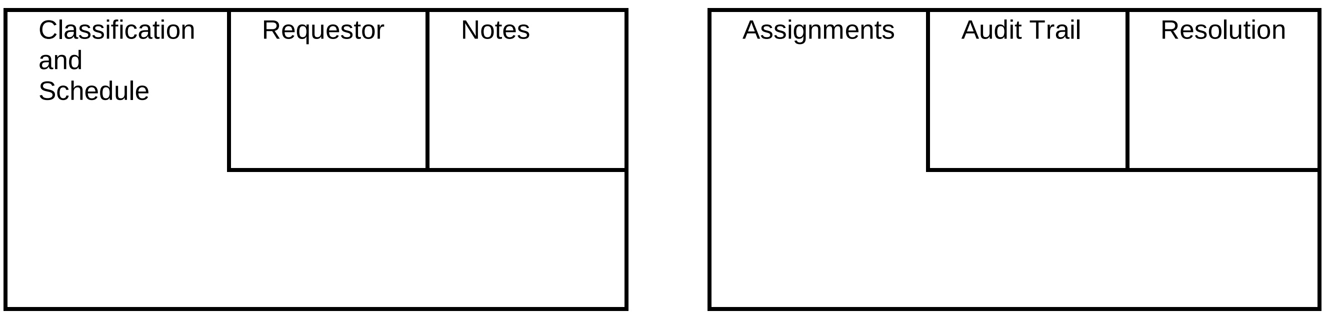
In addition to customizing tab displays, you can arrange and save tab layouts for new and existing Work Orders and Assignments. Once you save the tab layouts, when you create a new Work Order or Assignment, the tabs will display according to your settings.

For example, you might want to arrange the tabs for new Work Orders with the following tabs:



Example: Tab Layout for New Work Orders

You could arrange existing Work Orders to include the Assignments, Resolution, and Audit Trail tabs on the right pane.



Example: Tab Layout for Existing Work Orders

To Save Tab Layouts for Work Orders:

1. Arrange the tabs on the left and right pane (see the previous topic Customizing Tab Displays).
2. From the **Tab Layout** button on the menu bar, select any of the following options:

    - Save as New Work Order
    - Save as New Assignment
    - Save as Edit Work Order
    - Save as Edit Assignment

    Depending on the layout you saved above, the new tab layout will persist when the window is reopened.

Creating a Work Order from a Template/Creating Templates

Creating a Work Order from a Template

You can use work order templates to save data entry time when documenting recurrent issues. For example, you can select work order templates with pre-populated information for resetting user passwords, replacing network components, restoring lost data, and other types of issues that may commonly occur within your organization.

Important: You can apply a template at any time, even for existing work orders. However, any values existing in the template will replace the values in the work order.

To Use a Work Order Template:

1. Select **Template** from the **Actions** menu on the **Work Order** window tool bar, then select the Template name.

   The Work Order displays with the pre-populated fields from the template. The Assignments tab displays an information icon with a message that the Work Order must be saved in order to view the assignments.
2. Click the **Save** button

   The assignments display in a grid on the Assignments tab. The grid can be customized (to display more columns, for example). (See Creating User-defined Grid Views.)

   You can change any of the values on the Work Order if necessary.

3. When you are finished entering information, click the **Save** button on the toolbar.

Next Topic: Entering the Requestor's Contact Information

See also: Creating Work Order Templates in the Administrator's Guide and Copying Work Orders and Assignments in the Technician's Guide.

Creating Work Order Templates

You can create work order templates so that technicians can save data entry time when documenting recurrent issues. For example, technicians can select work order templates with pre-populated information for resetting user passwords, replacing network components, restoring lost data, and other types of issues that may commonly occur within your organization. Work Order Templates can also contain Assignments. (See Adding Assignments to Work Orders.)

You can create Work Order Templates from the **Help Desk** module or from the Administration Console. You can also create them based on an Event Policy in the **Event Policies** panel in the **Administration Console**. (See Setting up Work Order Event Policies).

Certain fields are unavailable while you are creating the template so that they can be selected when creating new work orders from them. These are:

- Asset
- Call Back Number
- Date Completed
- Department Number
- Expected Completion Date
- Technician Assigned

To Create a Work Order Template from the Help Desk Module:

1. Select **New Work Order** from the **Tasks** pane in the **Help Desk** module.
2. Select **Template** from the **Actions** menu on the **Work Order** window tool bar, then click **Select Template**.
3. Click the **New** button on the **Apply Template** dialog box.
4. Complete the Work Order form as described in the topic Documenting the Issue in the Technician's Guide.

To Create a Work Order Template from the Administration Console:

1. From the main menu bar, select **Tools/Administration Console/Lookup Tables/Help Desk/Work Order Templates.**
2. Click the **Add** button on the **Work Order Templates** panel.

3. Complete the Work Order form as described in the topic Documenting the Issue in the Technician's Guide.

To Create a Work Order Template from an Event Policy (Administration Console):

1. From the main menu bar, select **Tools/Administration Console/Lookup Tables/Help Desk/Event Policies.**
2. Select the Event Policy and click the **Add** (or **Edit** button for existing Event Policies).
3. Click the **Create Template** button.
4. Complete the Work Order form as described in the topic Documenting the Issue in the Technician's Guide.

See also: Creating a Work Order from a Template in the Technician's Guide.

Copying Work Orders and Assignments

You can copy work orders and assignments to save data entry time. All attributes of a Work Order or Assignment will be copied, including attachments, except for the following (in reference to the Technician and Date information).

Technician Information	Dates
Opened By Last Modified By Closed By	Date Entered Date Opened Date Assigned Modified On Estimated Completion Date Date Completed

To Copy a Work Order:

1. Right click the Work Order from the Work Order grid and select **Copy**.
   You can also select the Work Order and press **CTRL+C, OR**
   Click the **Copy** icon on the main toolbar, **OR**
   Click **Copy on** the **Tasks** pane.
2. On the **Copy Work Order** dialog, select or enter the number of copies to make.
3. To also copy the Attachments associated with the Work Order, click the **Include Attachments** check box.
4. Click the **OK** button.
   The copied Work Order(s) display in the Work Order grid, and are automatically assigned a Work Order ID (a system-generated consecutive number). You can edit the copied Work Orders as necessary.

Sending Messages to Technicians and Requestors from Work Orders

E-mailing Work Order Details to Requestors and Technicians

You can e-mail Work Order details to Requestors and Technicians, as well as other recipients, from BMC Track-It! The message contains pre-populated information (e.g.,the Work Order Number, Summary, Description, and Status), as well as your own messages. BMC Track-It! provides e-mail conversation management so that messages and responses are captured on the Work Order Notes and Audit Trail tabs.

Notes:

- Make sure the recipients' e-mail and/or SMS addresses are specified, which can be set up by double clicking the user name link on the Work Order and going to the Notification tab on the Technicians dialog. See Setting the Technician's E-mail Address for Notifications.
- The Work Order Monitor and E-mail Monitor determine the frequency that messages are sent and received. These settings are configured by your BMC Track-It! Administrator in the Administration Console.
- You can configure the E-mail Templates for the Technician and Requestor from the **Send Technician E-mail Message** or **Send Requestor E-mail Message** dialogs (without having to go to the Administration Console). See Configuring the E-mail Template, below.
- You can edit and delete Description and Technician Notes depending on Journaling permissions set up by your BMC Track-It! Administrator.

To E-Mail Work Order Details:
You can send e-mails from the Work Order grid or within a Work Order.

1. From the **Help Desk** module Work Order grid:
    a. Select the **Work Order**.
    b. Right click and select **E-mail Requestor** or **E-mail Technician**, **OR**
    Click the **E-mail Requestor** or **E-mail Technician** icon on the toolbar, **OR**
    Select **E-mail Requestor** or **E-mail Technician** from the **Tasks** pane.
2. Alternatively, from the **Work Order** detail window, click the **E-mail Requestor** icon or select **E-mail** from the **E-mail Technician** icon on the toolbar.
3. On the **Send Technician E-mail Message** or **Send Requestor E-mail Message** dialog:
    Note: When sending messages to the assigned Technician or Requestor, their e-mail addresses are set by default -- you don't have to enter them.
    a. Enter the e-mail addresses of recipients in addition to the assigned Technician in the **Cc** and **Bcc** fields (optional).
    (You can enter multiple e-mail addresses separated by commas or semi-colons.)
    To save these as the default e-mail addresses for this Work Order, click the **Save e-mail addresses**...check box.
    b. Enter a message in the **text box**.
    The text you enter will be added to the e-mail content automatically generated, which is based on the Manual Notification template. (See Configuring E-mail Templates if you want to change the default text.)
    c. Click the **Preview** button to view the message, then click the **OK** button.
    d. Messages addressed to the assigned Technician are marked Private by default (so that so that only Technicians, and not end users, can view them. To mark the message Public, click the **Private** checkbox to deselect it.
    e. The Work Order's Attachments are included in the message by default. To exclude the them, click to deselect the **Include attachments...** checkbox.
    f. Click the **Save** button.
4. **C**lick the **Save** button on the Work Order.

To View Sent or Received Messages and Mark Them Private or Public:
Once the Work Order is saved, the Work Order **Notes** tab displays the E-mail message note type (in gray) as "queued", the date and time, your name, and the additional message you entered. When the Work Order Monitor sends the message, the Notes display the date and time the message was sent.

When the recipient(s) receive the e-mail message, they can reply to the message and the information will be appended to the Work Order (on the Work Order **Notes** tab).

1. To view the sent or received message contents, click the **Edit** button on the message.

2. If you want to change the message from Private to Public or vice versa, click the **Private** checkbox.

To Delete Notes Created from Messages:

1. Click the **Delete** button on the message note you want to delete in the **Notes** panel (these are highlighted in gray), **OR**
   Select the note using the arrow keys, then press the **Delete** key. Click **Yes** on the **Delete Confirmation** message.
2. Click **Yes** on the confirmation dialog to delete the note or **No** to cancel the deletion.
3. **C**lick the **Save** button on the Work Order.

Texting Work Order Details to Technicians

You can text Work Order details from BMC Track-It! to the assigned Technicians' mobile device. The message contains pre-populated information (e.g.,the Work Order Number, Summary, Description, and Status), as well as your own message. BMC Track-It! provides e-mail conversation management so that text messages are captured on the Work Order Notes and Audit Trail tabs.

Notes:

- If the Technician replies to the text message via his/her mobile device, the message will not be captured on the Notes panel (only text messages sent from BMC Track-It! are captured).
- Make sure the Technician's SMS address is specified, which can be set up by double clicking the Technician's name link on the Work Order and going to the Notification tab on the Technicians dialog. See Setting the Technician's E-mail Address for Notifications.
- The Work Order Monitor and E-mail Monitor determine the frequency that messages are sent and received. These settings are configured by your BMC Track-It! Administrator in the Administration Console.
- You can configure the text message template from the **Send Technician E-mail Message** dialog (without having to go to the Administration Console). Configuring E-mail Templates.

To Text Work Order Details to Technicians:
You can send text messages from the Work Order grid, or within a Work Order.

1. From the **Help Desk** module Work Order grid:
   a. Select the **Work Order**.
   b. Select **E-mail Technician**, then select **Text Message (SMS)** from the **Tasks** pane, **OR**
      Right click and select **E-mail Technician**, then select **Text Message (SMS)**, **OR**
      Click the **E-mail Technician** icon on the toolbar, then select **Text Message (SMS)**.
2. Alternatively, from the Work Order detail window, select **Text Message (SMS)** from the **E-mail Technician** icon on the toolbar.
3. On the **Send Text Message (SMS)** dialog:
   Note: When sending messages to the assigned Technician, his/her SMS address is set by default -- you don't have to enter it.
   a. Enter a message in the **text box.**
      The text you enter will be added to the e-mail content automatically generated, which is based on the Manual Notification template. (See Configuring E-mail Templates if you want to change the default text.)
   b. Click the **Preview** button to view the message, then click the **OK** button.
   c. Messages addressed to the assigned Technician are marked Private by default (so that so that only Technicians, and not end users, can view them. To mark the message Public, click the **Private** checkbox to deselect it.
      This can also be changed after the message is sent. See To View Sent Messages, below.
   d. Click the **Save** button.

To View Sent Messages and Mark Them Private or Public:
Once the Work Order is saved, the Work Order **Notes** tab displays the text message note type (in gray) as "queued", the date and time, your name, and the additional message you entered. When the Work Order Monitor sends the message, the Notes display the date and time the message was sent.

1. To view the sent message contents, click the **Edit** button on the message.
2. If you want to change the message from Private to Public or vice versa, click the **Private** checkbox.

To Delete Notes Created from Messages:
1. Click the **Delete** button on the message note you want to delete in the **Notes** panel (these are highlighted in gray), **OR**
   Select the note using the arrow keys, then press the **Delete** key. Click **Yes** on the **Delete Confirmation** message.
2. Click **Yes** on the confirmation dialog to delete the note or **No** to cancel the deletion.
3. **C**lick the **Save** button on the Work Order.

Printing Work Orders

To Print Work Orders:
1. From the **Help Desk** module, select the Work Order, then select **Print** from the **Tasks** pane, **OR**
   Right click and select **Print**, **OR**
   Click the **Print** icon on the toolbar.

Closing Work Orders

Closing Work Orders Overview

In BMC Track-It!, finalizing Work Orders can be a multi-step process, depending on your organization. Typically, once all tasks are complete on a Work Order, including any Work Order Assignments, help desk technicians enter the following information on the Work Order:

1. Document the issue's resolution
2. Enter billing information if applicable
3. Enter the date the Work Order was completed
4. Change the Work Order's status (to Closed or other available statuses)

   Note: In BMC Track-It!, there are two default statuses for Work Orders: Open and Closed. Your BMC Track-It! Administrator can create additional statuses to help you differentiate Work Orders, such as Pending (see Defining Work Order Statuses in the Administrator's Guide).

5. You can also reopen closed Work Orders, if necessary.

Once the completion date is entered on a Work Order, they display on system views, charts, and reports. For example, you can view a list of Closed Work Orders in the Work Order grid of the Help Desk module, the Closed Work Order Count chart in the Dashboard module, and the Closed Work Orders by Technician report in the Reports module. (Reports use the Work Order's Date Completed entry).

Next Topic: Documenting Work Order Resolutions

See also: Reopening Closed Work Orders

Documenting Work Order Resolutions

While the **Description and Technician Notes** tab is typically used to describe an issue, the **Resolution** tab enables you to describe exactly how you solved the problem. This information may help you and other technicians in similar situations. Additionally, by keeping the issue's description separate from the resolution, you can add your resolution to the Solutions module. If a solution already exists, you can use it as your Work Order's resolution.

You can also use shortcut keys (such as CTRL+Shift+R to place the cursor in the **Resolution** field of the **Resolution** tab.

Notes:

- You can edit and delete Resolution Notes depending on Journaling permissions set up by your BMC Track-It! Administrator.

To Document a Work Order's Resolution:

1. Open the Work Order or Assignment and select the **Resolution** tab, **OR**
   Press **CTRL+Shift+R** anywhere on the Work Order details window to place the cursor in the **Resolution** field of the **Resolution** tab.
2. Select an option from the **Resolution Code** drop-down list.
   Resolution Codes are set up by your BMC Track-It! Administrator for reporting purposes. For example, if the issue was resolved by installing software, you could select Installation. If the issue was user error, you could select Training.
3. Enter your steps to resolve the issue in the **Notes** text box, then click the **Add Note** button, **OR**
   Enter a note in the text box, then press **CTRL+Enter**. The note will display in the Notes panel descending chronological order.

   Unlike Descriptions and Technician Notes, Resolutions are public and cannot be marked private. This means Resolutions will be visible in the Self Service Web for end users.

4. Click the **Save** button.

To Edit Resolution Notes:

1. Click the **Edit** icon on the top right of the Resolution Note, OR
   Press the **Enter** key while the note is selected to open the **Edit Note** dialog.
2. You can change the **Activity Code** if necessary by selecting it from the drop-down list.
3. Edit the information in the **Notes** text box.
4. When you're finished with the edits, click the **OK** button.
   The **Resolution Tab** re-displays showing your changes.

To Delete a Resolution Note:

1. Click the **Delete** button on the note you want to delete in the **Notes** panel, **OR**
   Select the note using the arrow keys, then press the **Delete** key. Click **Yes** on the **Delete Confirmation** message.
2. Click **Yes** on the confirmation dialog to delete the note or **No** to cancel the deletion.

See also: Creating Work Order Resolutions from Solutions and Creating Solutions from Work Order Resolutions

Entering Work Order Billing Information (Hours and Charges)

For reporting purposes, your BMC Track-It! Administrator may require you to enter the amount of time you spend on a Work Order or Assignment. The Administrator can also set up an hourly charge per Technician and/or Technician Group. The total charge is automatically calculated when you enter your hours.

Note: Hours and charges are cannot be manually entered or changed on Work Orders that have Assignments. This is because the parent Work Order's billing information is cumulative based on the values entered on the Assignments and is calculated by the system.
To Enter Billing Information:
Accessing the Work Order Window

1. Open the Work Order if it has no Assignments, or the Assignment if it has a parent Work Order.
2. Select the **Resolution** tab, and enter the number of hours spent in the **Hours** field.
3. The Charge is automatically calculated and displays in the **Charge** field. If it does not, you can manually enter it.
   (Check with your BMC Track-It! Administrator if an hourly rate needs to be established).
4. Click the **Save** button.

Next Topic: Closing Work Orders

Closing Work Orders

Note: All Work Order Assignments must be closed before the parent Work Order can be closed.

You can close a Work Order from the Work Order grid, or from the Work Order window. You can change the Work Order's status from Open to Closed, or to any other status as set up by your BMC Track-It! Administrator.
To Close a Work Order:
Accessing the Work Order Window

1. To change the status on the **Work Order** detail window, either click the **Change Status to "Closed"** button on the toolbar, or select "Closed" from the **Status** drop-down list.

   Once "Closed" is selected, the **Date Completed** field on the **Classification and Schedule** tab automatically displays the current date and time, but can be changed.

2. To change the status from the **Work Order** grid:
   - Right click the Work Order, then select **Change Status**, **OR**
   - Select the Work Order, then click **Change Status** on the **Tasks** pane, **OR**
   - Select the Work Order, then click the **Change** button on the toolbar, and select **Change Status**.
3. On the **Change Status** dialog, select **Closed** from the **Status** drop-down list.
4. To add an optional **Description** or **Technician note**, select the note type from the **Type** drop-down list, then enter the note in the **Note** text box.
5. To categorize the note, select the code from the **Activity Code** drop-down.
6. To mark the note private, click the **Private** check box (the note will only be visible to Technicians and not end Users in e-mails and Self Service Web)
7. When you are finished, click the **OK** button.

   The note displays on the Work Order's **Description and Technician Notes** tab.
8. Click the **Save** button on the **Work Order** window.

The **Audit Trail** tab displays the date and time the Work Order's Status was changed and by whom.

Next Topic: Reopening Closed Work Orders

Reopening Closed Work Orders

If necessary, you can reopen a closed work order.
To Reopen a Closed Work Order:

1. To reopen a Work Order on the **Work Order** detail window, either click the **Change Status to "Open"** button on the toolbar, or select "Open" from the **Status** drop-down list.

   The **Date Completed** field on the **Classification and Schedule** tab is cleared.

2. To change the status from the **Work Order** grid:
   - Right click the Work Order, then select **Change Status**, **OR**
   - Select the Work Order, then click **Change Status** on the **Tasks** Pane, **OR**
   - Select the Work Order, then click the **Change** button on the toolbar, and select **Change Status**.
3. On the **Change Status** dialog, select **Closed** from the **Status** drop-down list.
4. To add an optional **Description** or **Technician note**, select the note type from the **Type** drop-down list, then enter the note in the **Note** text box.
5. To categorize the note, select the code from the **Activity Code** drop-down.
6. To mark the note private, click the **Private** check box (the note will only be visible to Technicians and not end Users in e-mails and Self Service Web)
7. When you are finished, click the **OK** button.

   The note displays on the Work Order's **Description and Technician Notes** tab.
8. Click the **Save** button on the **Work Order** window.

   The **Audit Trail** tab displays the date and time the Work Order's Status was changed and by whom.

See also: Closing Work Orders

Deleting Work Orders

If your BMC Track-It! Administrator has given you the necessary permissions, you can delete Work Orders.

Important Note: Deleting a Work Order also deletes its assignments.
To Delete a Work Order:

1. Right click the Work Order from the Work Order grid and select **Delete**.
   You can also select the Work Order (or multiple Work Orders) and press **Delete**, **OR**
   Click the **Delete** icon on the main toolbar, **OR**
   Click **Delete** on the **Tasks** pane.
2. The **Delete Work Order** confirmation dialog displays. Click **OK** to delete the Work Order(s) and any Attachments.

Viewing and Printing Help Desk Reports

Note: Technicians will only be able to view the report details for those they are privileged to view (based on Module, Location, Department, and Assigned Technician as set up by the BMC Track-It! Administrator).

You can view and print the following Help Desk Reports:

- Assets Ranked by Number of Logged Work Orders
- Average Hours to Complete Work Orders by Technician
- Average Hours to Complete Work Orders by Week
- Average Response Time by Technician
- Average Time to Complete Work Orders by Month
- Calls Closed Summary by Date by Technician
- Calls Closed Summary by Hour by Technician
- Calls Received Summary by Date by Technician
- Calls Received Summary by Hour by Technician
- Closed Work Orders in SLA Violation
- Completed Work Orders by Department
- Completed Work Orders by Location
- Completed Work Orders by Month
- Completed Work Orders by Technician
- Completed Work Orders with Department SLAs
- Completed Work Orders with Requestor SLAs
- Departmental Work Order Cost
- Open SLA Violations
- Open Work Order Aging
- Open Work Orders by Date Entered
- Open Work Orders by Due Date
- Open Work Orders by Priority
- Open Work Orders by SLA
- Open Work Orders by Status
- Open Work Orders by Technician
- Overdue Work Orders by Date Entered
- Overdue Work Orders by Due Date
- Overdue Work Orders by Priority
- Overdue Work Orders by Status
- Overdue Work Orders by Technician
- Technician Work Order Totals by Week
- Total Work Orders by Priority by Month
- Total Work Orders by Priority by Week
- Total Work Orders Opened by Month
- Total Work Orders Opened by Week
- Unassigned Work Orders by Due Date
- Users Ranked by Number of Logged Work Orders
- Work Order Status by Department
- Work Order Status by Location
- Work Order Status by Technician
- Work Order Summary Count
- Work Order Trends by Technician
- Work Order Trends by Type
- Work Orders Closed within 1 Hour

To View Help Desk Reports:

1. Select the **Reports** module from the **Navigation** pane.
2. Select **Help Desk** from the **Reports by Module** drop-down list above the Reports grid.
3. Double click the report you want to view.

See Also: Reports Overview

Managing Work Orders with BMC Track-It! Web

In addition to BMC Track-It! Technician Client, you can use BMC Track-It! Web so that you can troubleshoot and solve IT issues while not at your desk. When you're back at your desk, you can manage any of the Work Orders you created or edited in BMC Track-It! Web from the BMC Track-It! Technician Client.

Note: Online help is available once you log in to BMC Track-It! Web (and is separate from the BMC Track-It! Technician Client online help). The topics in the online help are also available in the BMC Track-It! Web Technician's Guide (PDF) on the Product Documentation section of our Support Web page

To Access BMC Track-It! Web:

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

   The **BMC Track-It! Web** home page displays.

Maintaining Work Order Solutions

Adding and Maintaining Work Order Solutions

The **Solutions** module enables Technicians to maintain a database of solutions to common work order issues. With the Solutions module, you can:

- Add solutions and attach files
- Find Previous Solutions to Work Order Issues
- Create solutions from Work Order resolutions
- Create Work Order resolutions from solutions

Note: Your BMC Track-It! Administrator can configure Self Service Web to allow end users to view attachments to Solutions.

Adding Solutions

To Add Solutions Directly in the Solutions Module:
You can add solutions in the Solutions module, or you can create a solution from Work Order resolutions.

1. Select the **Solutions** module from the **Navigation Pane** of the BMC Track-It! Technician Client.

   Solutions are displayed in a hierarchical structure as topics (book icons) and solutions (page icons). The top-level topic is called the Root topic. You can add sub-topics in multiple levels beneath the Root topic. For example, you can create sub-topics called Hardware, Software, Network, etc., and sub-topics for each of these (such as PCs, Printers, and Routers under the Hardware sub-topic.

Creating Topics

1. To create a new topic, select **New Topic** from the **Tasks** pane, **OR**
   Right click a topic (book icon) and select **New Topic**.
2. In the **Topic Detail** dialog, the **Parent Topic** is displayed in the indicated field. To select a different Parent Topic, click the **Ellipses** button, select the topic from the **Choose Parent Topic** dialog, then click the **OK** button.
3. Enter a name for the new topic in the Topic Name field of the **Topic Detail** dialog.

Creating Solutions

1. Right click on a **Topic** (book icon), and select **New Solution**.
2. In the **Solution Detail** dialog, enter a description for the solution in the **Summary** text box.
3. To select a different Parent Topic, click the **Ellipses** button, select the topic from the **Choose Parent Topic** dialog, then click the **OK** button.
4. Enter a detailed description for the solution in the **Details** text box.

Attaching Files to Solutions

1. If the Solution is not already open, double click the **Solution** icon (page icon) to open it.
2. To attach a file to a Solution, click the **Insert** button in the **Attachments** section of the **Solution Detail** dialog.
3. Navigate to the file from the **Open Attachment** dialog, then double click the file or click the **Open** button.
   The file name displays in the **Attachments** section of the **Solution Detail** dialog.
4. Click the **Save** button.

Organizing Topics and Solutions

You can move Topics up and down the hierarchy.

To Organize Topics and Solutions:

1. Click and drag the Topic or Solution to the parent topic.

Editing Topics and Solutions

To Edit Topic Names:

1. Double click to open the Topic, **OR**
2. Right click and select **Edit.**
3. In the **Topic Detai**l dialog, change the text in the **Topic Name** field, then click the **Save** button.

To Edit Solutions:

1. Double click to open the Solution, **OR**
2. Right click and select **Edit.**
3. In the **Solution Detai**l dialog, make the desired changes, then click the **Save** button.

Deleting Topics and Solutions

To Delete a Topic:

1. Right click the Topic (book) icon, then select **Delete**.
2. If you want to delete the topic and all of its contents, click the **Yes** button on the Confirmation dialog

To Delete a Solution:

1. Right click the Solution (page) icon, then select **Delete**.
2. Click the **Yes** button on the Confirmation dialog to delete the Solution.

Making Solutions Private or Public

The following explains how to create solutions in the Solutions module. You can also create solutions from Work Order resolutions. You can make a solution private so that only Technicians can view it. (By default, solutions are public -- end users can view them if they have permissions to Self Service Web.)
To Make a Solution Private:

1. Right click the Solution (page icon) in the **Solutions** list, select **Set Solution State**, then select **Private**.
   Private solutions are indicated by a page icon with a red circle-backslash symbol.
2. To set the Solution state of all the Solutions in a Topic at once, select the parent Topic (book icon) directly above the set of Solutions, select **Set Solution State**, then select **Private**.

To Make a Private Solution Public:

1. Right click the Solution (page icon) in the **Solutions** list, select **Set Solution State**, then select **Public**.

See also: Creating Solutions from Work Order Resolutions (BMC Track-It! Web) and Creating Work Order Resolutions from Solutions (BMC Track-It! Web)

Finding Previous Solutions to Work Order Issues

You can search for Solutions from the **Search** field and **Search** button on each module's toolbar (Help Desk, Inventory, Solutions, etc.), as well as from individual windows, such as Work Orders or Assets.
To Search for Solutions:

1. Enter the search term in the **Search** field (main toolbar), then select **Solutions** from the **Search** button's drop-down list.
   (The **Search** button displays the name of the last search, such as **Search Asset**, or **Search User)**. The **Search Solutions** dialog opens and displays the search results.
2. Double click (or right click and select **Open**) to view the Solution.

Creating Solutions from Work Order Resolutions

If you have resolved a common Work Order issue, you can add the resolution to the Solutions module.
To Create a Solution from a Work Order:
Accessing the Work Order Window

1. On the **Resolution** tab of the Work Order, click the **Make Solution** icon.
2. On the **Choose Parent dialog**, click the **Expand** button (+) next to the **Root** topic icon, and continue expanding the topics until you find the one that best categorizes the resolution, then click the **OK** button.
3. On the **Solution Detail** dialog, click the **Save** button (you can make any edits as necessary first).

Creating Work Order Resolutions from Solutions

You may find that there are common resolutions to an issue that already exist in the Solutions module. You can insert a Solution directly into a Work Order as the Resolution.
To Create a Work Order Resolution from a Solution:

1. On the **Notes** tab of the Work Order, click the **Insert Solution** button.
2. On the **Insert Solution** dialog, enter the search term in the **Search for:** field, then click the **Search** button.
3. Double click (or right click and select **Open**) to select the Solution.

Printing Solutions to Work Orders

To Access the Solutions module:

1. Select the **Solutions** module from the left pane of the BMC Track-It! Technician Client window.

To Print Solutions:

1. Select the Solution, then click the **Print Solution** icon on the toolbar, **OR**
   Right click the Solution, and select **Print**.

Maintaining Solutions with BMC Track-It! Web

In addition to BMC Track-It! Technician Client, you can use BMC Track-It! Web to maintain Solutions. When you're back at your desk, you can manage any of the Solutions you created or edited in BMC Track-It! Web from the BMC Track-It! Technician Client.

Note: Online help is available once you log in to BMC Track-It! Web (and is separate from the BMC Track-It! Technician Client online help). The topics in the online help are also available in the BMC Track-It! Web Technician's Guide (PDF) on the Product Documentation section of our Support Web page marasoftware.com/support/updates.asp?product=2&content=Documentation&version=11&Offering=2&lang=EN

To Access BMC Track-It! Web:

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

   The **BMC Track-It! Web** home page displays.

Purchasing: Managing Purchases

Purchasing Module Overview

You can create and track purchase orders with the **Purchasing** module, which is integrated with the **Inventory module** and **Software License Management** modules. If you have a license for the **Software License Management module**, once the software is recorded in the Purchasing module, BMC Track-It! automatically populates the Software module with the names and number of licenses purchased. (See Software Module Overview in the Administrator's Guide).

Your BMC Track-It! Administrator configures the following Purchasing Lookup Tables so that you can quickly and easily create Purchase Orders (see the Purchasing chapter in the Administrator's Guide):

- Vendors
- Products (Master Items and Product Types)
- Default Tax Rates
- Default Shipping and Billing information
- Automatic creation of purchase order numbers
- Associate Software titles with Master Items

Purchasing Steps Overview

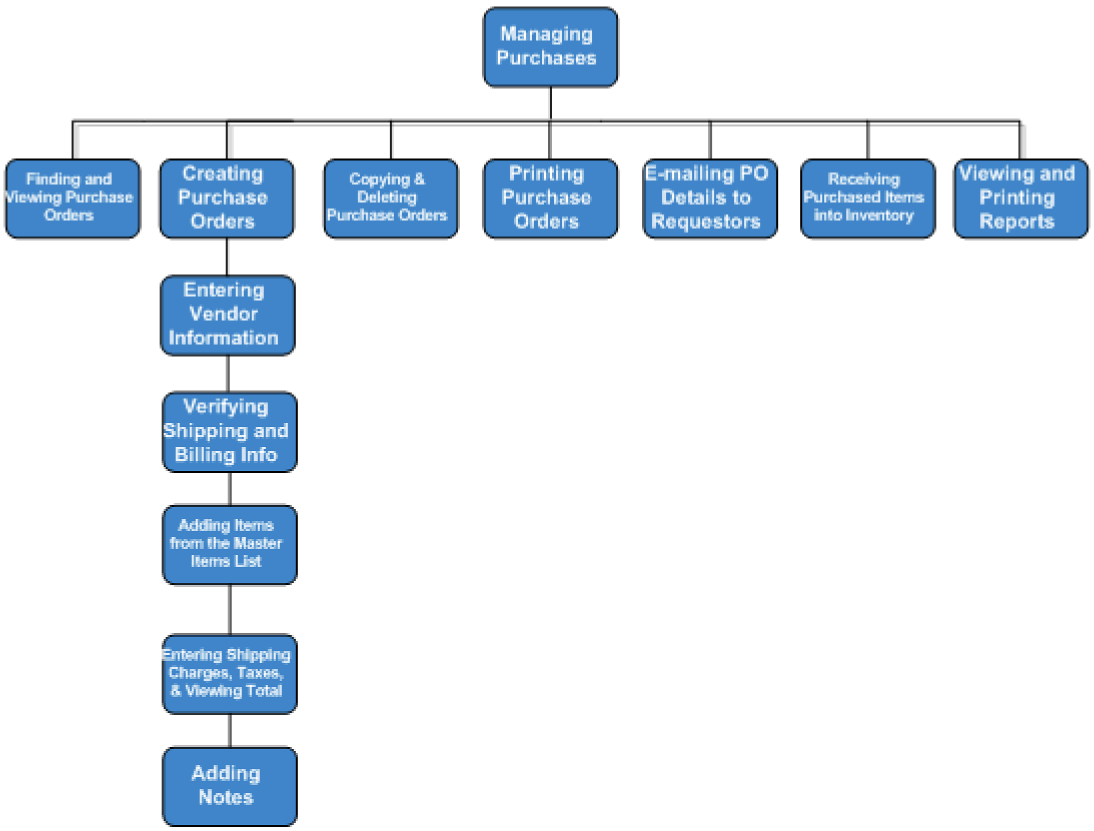
1. Create the Purchase Order in BMC Track-It!.
   a. Select the Vendor
   b. Verify Shipping and Billing information
   c. Select Items from the Master Items list (customized catalog of products) and add them to the Purchase Order
      BMC Track-It! automatically calculates the sub-total amount, sales tax, shipping charges, price adjustments and total amount
   d. Add relevant notes
2. Print and mail and/or e-mail (from BMC Track-It!) the Purchase Order to the Vendor.

3. When the items are received, record the receipt date in BMC Track-It!.
   The items are automatically transferred to the **Inventory** module (to the Unassigned Asset).
4. Assign the item to the requestor's asset (such as the computer).

Next Topic: Managing Purchases (Workflow)

Managing Purchases (Workflow)

The flowchart below represents the tasks in the following topics.



Previous Topic: Purchasing Module Overview
Next Topic: Viewing and Finding Purchase Orders

Viewing and Finding Purchase Orders

The list of Purchase Orders is displayed in the Purchasing grid (**Purchasing** module). You can sort, filter and group Purchase Orders (see Sorting, Filtering, and Grouping Records and search for individual items (see Viewing Information in Grids). You can also specify which columns (fields) to view (see Creating User-defined Views).

To View Purchase Orders:

1. Select **Purchasing** from the **Navigation** pane.
   The **Purchasing** window displays and Purchase Orders are listed in the grid.
2. Double click a Purchase Order in the grid to open it.
   You can also select **Open Purchase Order** from the **Tasks** pane, click the **Open** icon on the tool bar, or select **File/Open** from the menu bar.

The top pane of the Purchase Order window displays the most commonly-used fields to describe the Purchase Order: Requestor, Date Ordered, and Purchase Order Number. Additional information about the Purchase Order is displayed on the tabs (Order Information, Vendor Information, Shipping and Billing, Items, Notes, and License).

Customizing the Tabs Display

You can select which tabs to display, and which two to display at a time.

1. Right click any tab name, and select the check boxes of the tabs you want to display.
2. To display two tabs at once, right click the right pane (appears blank until a tab has been selected), then select a tab name.

Previous Topic: Managing Purchases (Workflow)
Next Topic: Creating Purchase Orders

Creating Purchase Orders

Creating Purchase Orders

The first step to creating a Purchase Order is to enter basic information (Requestor, Date Ordered, and Purchase Order Number) in the header area of the Purchase Order window. Then you'll enter order information (Date Required, Payment Terms, Comments, and additional user-defined fields as necessary. The header pane at the top of the window displays basic information about the purchase and the tabs display the details. You can customize the tabs that display (see also Customizing Tab Displays).

Note: An asterisk (*) indicates an entry in the field is required.
To Create a Purchase Order:
Basic Information

1. Select **Purchasing** from the **Navigation** pane.
2. Select **New Purchase Order** from the **Tasks** pane.
3. Select or enter the name of the person requesting the purchase in the **Requestor's** field (required).
4. Select or enter the date the item was ordered in the **Date Ordered** field.
1. Enter a number for the purchase order in the **Purchase Order Number** field (required).

Order Information

1. Select the **Order Information** tab.
2. Select or enter the date the item is required in the **Date Required** field.

   Note: Only enter the date you receive the item in the Date Received field when you want to complete the Purchase Order. It will remain open until you enter the date received. See Receiving Purchased Items into Inventory.

3. Enter the payment terms (such as Net 30) in the **Payment Terms** field.
4. Enter any comments as necessary in the **Comments** field.

Custom Fields

Note: User-defined fields can contain text values only -- no calculations are made on these fields. They will display on the printed purchase order and can display on user-defined reports.

Text Fields	You can enter text in up to four user-defined text fields. By default, the labels for these fields display **Text 1** through **Text 4**. However, the BMC Track-It! Administrator can change the label names. See Changing Field Label Text.

Date Fields	You can enter dates in up to two user-defined date fields.
Number Fields	You can enter whole numbers (such as 10) in the **Integer** field and values with decimals (such as .75) in the **Decimal** field.

Previous Topic: Viewing and Finding Purchase Orders
Next Topic: Entering Vendor Information on Purchase Orders

Entering Vendor Information on Purchase Orders

To Enter Vendor Information on Purchase Orders:

1. Select the **Vendor Information** tab on the Purchase Order.
2. Select the vendor from the **Vendor** drop-down list.
    a. If your BMC Track-It! Administrator has given you permissions, you can add a Vendor that is not listed. To add a vendor, click the **Add** button (**+**) next to the **Vendor** drop-down arrow. See Setting Up Vendors in the Administrator's Guide for detailed instructions.
3. The **Address** and **Contact** information will automatically display for the selected vendor if the information has been set up in Lookup Tables.

    Note: If necessary, you can change the contact information on the **Vendor Information** tab, but the changes will not be reflected in the Vendors Lookup Tables. To change the Lookup Tables, select **Vendors** from the **See Also** link in the **Tasks** pane.

Previous Topic: Creating Purchase Orders
Next Topic: Verifying Shipping and Billing Information for Purchase Orders

Verifying Shipping and Billing Information for Purchase Orders for Purchase Orders

When you create a purchase order, you'll need to verify the shipping and billing information. This information will display on the printed purchase order. Your BMC Track-It! Administrator can set up default shipping and billing information for purchase orders in the Administration Console (Purchasing Lookup Tables). This information will display for each new purchase order that is created. (See Setting up Shipping and Billing Information for Purchase Orders). You can, however, change the information for specific purchase orders, and include additional shipping information (such as delivery instructions).
To Verify Shipping and Billing Information on Purchase Orders:

1. Select the **Shipping and Billing** tab on the Purchase Order.
2. If the default information in the **Bill to:** and **Ship to:** text boxes is not correct, you can make any necessary changes (this will not affect the default information saved in Lookup Tables.
3. You can enter additional shipping information in the **Shipping Information** text box.

Previous Topic: Entering Vendor Information on Purchase Orders
Next Topic: Adding Items from the Master Items List to Purchase Orders

Adding Items from the Master Items List to Purchase Orders

When you create a purchase order, you add the items you want to purchase from the Master Items list. This list, created by your Track-It! Administrator or designated Technician, is a customized catalog of common Items you'll be purchasing and/or adding to inventory to save time with data entry. For detailed information on the Master Items list, see Creating the Master Items Catalog for Purchasing, Inventory, and Library in the Administrator's Guide.
To Add Items from the Master Items List to a Purchase Order:

1. Select the **Items** tab on the Purchase Order.
2. Click the **Add** button to select an item from the **Master Items** list.
3. On the **Master Item** dialog, select the item you want to add to the purchase order.

   Note: If the item is not on the Master Item list, Administrators can create it and add it to the **Master Items** list in the **Administration Console**. You can access the list from the **Master Items** link on the **Tasks** pane of the **Purchasing** module. See Creating Items for Purchasing and Inventory in the Administrator's Guide for detailed information.

4. In the **Product Information** section of the **Line Item** dialog, the **Product** name displays. Enter the **Part Number**.
5. In the **Order Information** section, enter the quantity of items you want to order in the **Quantity Ordered** text box.
6. Enter the price per item in the **Price** field.
7. Click the checkbox **Create Tracked Items in Unassigned Equipment when this item is received**.

   This will place the item in the **Tracked Items** list in the **Unassigned Equipment** asset so you can assign it to the Requestor. The Purchase Order information will display on the **Tracked Item** dialog for the item.

   See Storing Items in the Unassigned Equipment List, Transferring Items to and from the Unassigned Equipment List, and Promoting Items to Assets.

8. Click the **OK** button on the **Line Item** dialog.
   The **Items** tab displays the selected item and details.

   When you're ready to receive the item, see Receiving Purchased Items into Inventory.

To Delete an Item:

1. Close the **Line Item** dialog.
2. On the **Items** tab, select the item and click the **Delete** button.
3. Click **Yes** on the **Confirmation** dialog.
   The **Total** is recalculated and displayed.
4. Click the **Save** button on the **Purchase Order** window.

Previous Topic: Verifying Shipping and Billing Information for Purchase Orders
Next Topic: Entering Shipping Charges, Taxes, and Viewing Total Amount

Entering Shipping Charges, Taxes, and Calculating the Total Amount for a Purchase Order

Once you've added items to the Purchase Order from the Master Items list, BMC Track-It! calculates and displays the **Sub-Total** amount. Next, you enter any Shipping charges. The sales tax is automatically calculated. You can also enter any price adjustments.

To Enter Shipping Charges, Taxes, and Calculate the Total Amount:

1. If there are shipping charges, enter them in the **Shipping** field.
   The **Sales Tax** is automatically calculated and displayed. (Your BMC Track-It! Administrator configures the sales tax and whether or not tax is calculated on Shipping in the Administration Console). However, you can change the sales tax for the purchase order if necessary. See Setting up Sales Tax for Purchase Orders in the Administrator's Guide.
2. If there is a price adjustment, such as a discount or surcharge, enter it in the Price Adjustment field.
   Negative numbers can be entered as follows: -50.75 or (50.75).

   The **Total** amount is automatically calculated and displays.

3. Click the **Save** button on the **Purchase Order** window.

Previous Topic: [Adding Items from the Master Items List to Purchase Orders]
Next Topic: [Adding Notes to a Purchase Order]

Adding Notes to a Purchase Order

To add notes to a purchase order:

1. Select the **Items** tab on the Purchase Order.
2. Select the Notes tab and enter text in the textbox.
3. Click the **Save** button when you've finished working with the Purchase Order.

Previous Topic: [Entering Shipping Charges, Taxes, and Viewing Total Amount]
Next Topic: [Copying and Deleting Purchase Orders]

Attaching Files to Purchase Orders

You can add files to Purchase Orders, such as text files, documents, or images. You can also rename and delete file attachments.

To View Purchase Order Attachments:

1. In the **Purchasing** grid, double-click the Purchase Order you want to view, or select the Purchase Order, then select **Open Purchase Order** in the **Tasks** pane.
2. Right click the file on the **Attachments** tab, then select **Open**.

Tip: You can customize the grid view and add the **# of Attachments** column to quickly view which records have attachments. See Showing and Hiding Columns in the [Creating User-defined Views] topic.
To Attach a File to a Purchase Order:

1. Select the **Attachments** tab on the **Purchase Order** window.
2. Click the **Add** button.
3. In the **Open Attachment** dialog, navigate to the location of the file, then double click it, or select it and click the **Open** button.
   The file displays on the **Attachments** tab on the **Purchase Order** window.
4. Click the **Save** button.

To Rename a File Attachment:

1. Right click the file on the **Attachments** tab, then select **Rename**.

To Delete a File Attachment from a Purchase Order:

1. Select the file on the **Attachments** tab, then click the **Delete** button on the confirmation dialog.
   You can also right click the file and select **Delete**, or press the **Delete** key.
2. Click the **Save** button on the **Purchase Order** window.

To Sort the List of Attachments:

1. Click the column header (e.g. "Name").

To Change the Grid View of the List of Attachments:

1. Right click anywhere on the **Attachments** tab, then select **View**.
2. Select an option from the View menu (Text Only, Wrap Text, Auto Arrange).

Copying and Deleting Purchase Orders

Copying Purchase Orders

If you frequently submit purchase orders for the same item, you can copy purchase orders to save data entry time. You can generate as many copies as you desire from a single purchase order.

The following fields are automatically populated when a PO is created:

- Purchase Order No. (if Auto Incrementing is set up in the Administration Console)
- Date Ordered (current date)

- Bill to Information
- Ship to Information
- Tax Rate

The following fields are not copied:

- Date Ordered
- Purchase Order No.
- Date Received
- Item Quantity Received

To Copy Purchase Orders:

1. From the **Purchasing** module, right click the Purchase Order and select **Copy Purchase Order**, **OR**
   - Click the **Copy** icon on the main toolbar, **OR**
   - Click **Copy Purchase Order** on the **Tasks** pane.
2. On the **Copy Purchase Order** dialog, enter the number of copies you want to generate.
3. Select the **Copy Items** checkbox if you want copy the items listed on the Purchase Order.
4. Click the **OK** button.
   The Copy Purchase Order dialog closes and the new purchase order(s) displays in the Purchase Order grid.
5. Open the purchase order and make any necessary changes.
6. Click the **Save** button.

Deleting Purchase Orders

As your purchase orders accumulate, you might find it desirable to clear some of the older records. This will clean up your computer memory and improve system performance.

Note: You should discuss any plans to delete purchase order records with your BMC Track-It! Administrator before you implement them.

To Delete Purchase Orders:

1. From the **Purchasing** module, right click the Purchase Order and select **Delete Purchase Order**, **OR**
   - Click the **Delete** icon on the main toolbar, **OR**
   - Click **Delete Purchase Order** on the **Tasks** pane.

   The Purchase Order is deleted and is removed from the grid.

Printing Purchase Orders

To Print Purchase Orders:

1. From the **Purchasing** module, select the Purchase Order, then select **Print** from the **Tasks** pane, **OR**
   - Right click and select **Print**, **OR**
   - Click the **Print** icon on the toolbar.

E-mailing Purchase Order Details to Requestors

You can e-mail Purchase Order details to Requestors that contain pre-populated information, such as the Purchase Order number, Date Ordered, Vendor, and Total price.

To E-Mail Purchase Order Details:

1. From the **Purchasing** module, select the Purchase Order that you want to e-mail.
2. Click the **E-mail Requestor** icon on the toolbar.

Receiving Purchased Items into Inventory

When you physically receive one or more items of a purchase order and record the receipt date in the Purchasing module, the items are automatically transferred to the **Inventory** module (to the Unassigned

Asset). Then you can assign the item to the requestor's asset (such as assigning a monitor to the requestor's computer). You can choose to receive all items at once with the Receive All feature, or receive items individually.

If you have a license for the **Software License Management** module, when you receive the software item in the **Purchasing** module, you can choose to create a single license for each item received or a bundled license (each item received will create a new license containing your specified number of licenses in the bundle). The licenses will be created and will display on the **Software** title dialog in the **Software License Management** module and on the **license** tab of the **Purchase Order** window.

Note: In order to use the **Software License Management** module with the Purchasing module, you'll need to set up Lookup Tables. The item must be associated to a title for this to display Associating Software Titles with Master Items

Receiving Items

Note: If you have the **Software License Management Module**, see below, **Receiving Software with the Software License Management Module**.

To Receive Purchased Items into Inventory:

1. Select **Purchasing** from the **Navigation** pane.
2. Select the Purchase Order from the **Purchase Order** grid.
   Note: If you don't know the Purchase Order number, you can search by the item's Product Name. To search for the item, enter the item's Product Name in the **Search** textbox on the Purchasing toolbar, then select **Search Purchasing** from the **Search** drop-down list.
3. To receive all items at once, click the **Receive All** button on the **Purchase Order** toolbar (or select **Receive All** from the **Actions** menu on the menu bar).
4. To receive individual items separately:
   a. Open the received item on the **Items** tab of the **Purchase Order** window.
   b. On the **Line Item** dialog, enter the number of items received in the **Quantity Received** field in the **Receiving Information** section.
5. If you are creating the Purchase Order at the same time you are receiving items, click the checkbox **Create Tracked Items in Unassigned Equipment when this item is received**.

   This will place the item in the **Tracked Items** list in the **Unassigned Equipment** asset so you can assign it to the Requestor. The Purchase Order information will display on the **Tracked Item** dialog for the item.

   See Storing Items in the Unassigned Equipment List, Transferring Items to and from the Unassigned Equipment List, and Promoting Items to Assets.

Receiving Software with the Software License Management Module

To Receive Software with the Software License Management Module:
(Steps 1-5 below are identical to the steps above).

1. Select **Purchasing** from the **Navigation** pane.
2. Select the Purchase Order from the **Purchase Order** grid.
   Note: If you don't know the Purchase Order number, you can search by the item's Product Name. To search for the item, enter the item's Product Name in the **Search** textbox on the Purchasing toolbar, then select **Search Purchasing** from the **Search** drop-down list.
3. Open the received item on the **Items** tab of the **Purchase Order** window.

4. On the **Line Item** dialog, enter the number of items received in the **Quantity Received** field in the **Receiving Information** section.
5. Click the checkbox **Create Tracked Items in Unassigned Equipment when this item is received**.

   This will place the item in the **Tracked Items** list in the **Unassigned Equipment** asset so you can assign it to the Requestor. See Storing Items in the Unassigned Equipment List, Transferring Items to and from the Unassigned Equipment List, and Promoting Items to Assets.
6. To receive **software**, click the checkbox **Create Software License when this item is received**.
   a. Select one of the following options:

Single License	Each item received will create a new license
Bundle License	Each item received will create a new license containing your specified number of licenses in the bundle

   b. If you selected **Bundle License**, enter the **number of licenses in the bundle** in the specified field.
7. Click the **OK** button.
8. If you created Software licenses, the **Open Software Title** dialog displays. Click Yes if you'd like to view the corresponding Software Title, or No to close the dialog and return to the **Items** tab on the **Purchase Order**.

   The software license information displays on the **Licenses** tab of the **Purchase Order**.

Viewing and Printing Purchasing Reports

You can view and print the following Purchasing Reports:

- Closed Purchase Order Summary
- Open Purchase Order Summary
- Open Purchase Orders by P.O. Date
- Open Purchase Orders by Required date
- Open Purchase Orders by Technician
- Open Purchase Orders by Vendor
- Overdue Purchase Orders by Required Date
- Overdue Purchase Orders by Vendor
- Summary of Received P.O.s by Technician
- Summary of Received P.O.s by Vendor
- Vendor Listing

To View Purchasing Reports:
1. Select the **Reports** module from the **Navigation** pane.
2. Select **Purchasing** from the **Reports by Module** drop-down list above the Reports grid.
3. Double click the report you want to view.

Training: Tracking Training for Individuals in Your Organization

Tracking Training for Individuals in Your Organization

The BMC Track-It! Training module enables you to schedule and track users' training -- whether within your organization or by external providers. Although you can use the Training module to track any kind of training, it is designed to help you monitor computer training. You can use the Help Desk module to analyze a user's work order history that might suggest training needs. You can view the hardware and software associated with a user through the Inventory module to identify a user's expertise for knowledge management. You can also use the Library module to track textbooks, computer-based training on CDs, Web based training, training materials and equipment, etc.
To View Course Histories for an Individual:

1. Select the **Training** module from the **Navigation Pane**.
2. The list of your organization's Users displays. Select a User, then click **Open Course History** from the **Tasks** pane.
   The **Edit User** dialog displays the **Course History** tab and the list of courses scheduled for the individual.

Next Topic: Scheduling Training for Individuals in Your Organization

Scheduling Training for Individuals in Your Organization

You can schedule training for the individuals in your organization and maintain training information in the Training module.
To Schedule Training:

1. Select the **Training** module from the **Navigation Pane**.
2. The list of your organization's Users displays. Select a User, then click **Open Course History** from the **Tasks** pane.
   The **Edit User** dialog displays the **Course History** tab and the list of courses scheduled for the individual.
3. To schedule a course for the individual, click the **Add** button.
4. Select the course from the **Course Listing** dialog, then click the **Select** button.
   The **Course Enrollment** dialog displays with course information as set up in the **Administration Console** Lookup Tables.
5. If any of the course information has changed, you can change it on this dialog. (The information will not be changed in the **Course** set up in Lookup Tables -- this is only to record information for the specific class).
6. There are six **Text** fields you can use to enter additional course information
7. Click the **OK** button on the **Course Enrollment** dialog when you are finished entering information.

To Set Up New Courses from the Training module:

1. Click the **Courses** link from the **See Also** list on the **Tasks** pane
   The Courses dialog displays in the Administration Console, **OR**
   - From Step 4 above, click the **New** button.

To E-mail an Individual from the Training Module:

1. Select the individual from the **Users** grid, then click **E-mail User** on the **Tasks** pane.
   You can also right click the individual, then select **E-mail User**.

Next Topic: Recording an Individual's Grade When Training is Completed

Recording an Individual's Grade When Training is Completed

To Record an Individual's Grade for a Course:

1. Select the **Training** module from the **Navigation Pane**.

2. The list of your organization's Users displays. Select a User, then click **Open Course History** from the **Tasks** pane.
   The **Edit User** dialog displays the **Course History** tab and the list of courses scheduled for the individual.
3. Double click the course to edit it.
4. Enter the grade in the **Grade** text box (such as A, Passed, Successful, etc.) then click the **OK** button.
5. Click the **Save** button on the **Edit User** dialog.
   The Users grid re-displays.

Library: Tracking Loaned Library Items

Library Overview

You can track items that you lend to the individuals in your organization, such as books, manuals, textbooks, videos, and even hardware such as laptops. You can create new Library items in the Library Module, or you can add them from the Master Items list (a customizable catalog of products). (For more information, see Creating the Master Items Catalog for Purchasing and Inventory in the Administrator's Guide.)

When you loan (check out) a Library item, you select the borrower's name from the User list, enter the Check Out and Due Dates, and Comments as necessary. Then when the item is returned, you enter the Check In date. If an item has not been returned by the due date, BMC Track-It! lets you know by displaying it as Overdue. (The default grid view for Library items is by Status: In, Out, and Overdue). You can open the item's record and contact the borrower since the User's contact information automatically displays from the User Lookup Tables.

Next Topic: Creating New Library Items in the Administrator's Guide.

Viewing and Finding Library Items

To View Library Items:

1. Select the **Library** module from the **Navigation Pane**.
   The Library grid displays with a list of items by loan status: In, Out, or Overdue. The User's name and phone number displays, as well as the Due Date and Date Checked Out. (You can display more columns by customizing the grid. See
2. Double click a library item to open it to view more details.

To work with the grid view, see the chapter on Viewing Information in Grids.

To Find a Library Item:
You can search for library items from the **Search** field and **Search** button on each module's toolbar (Library, Help Desk, Inventory, Solutions, etc.), as well as from individual windows, such as Work Orders or Assets.

To Search for Library Items:

1. Enter the search term in the **Search** field (main toolbar), then select **Library Items** (automatically selected in the Library module) from the **Search** button drop-down.
   The **Search Library Items** dialog opens and displays the search results.
2. The Library Items that include your search term are displayed in the Results list. To view the Library Items, double click (or right click and select **Open**).

Next Topic: Creating New Library Items

Creating New Library Items

You can either create a new library item by entering an item name, or you can add an item from the Master Items list.

To Create a New Library Item:

1. Select the **Library** module from the **Navigation Pane**.
2. Click **New Library Item** on the **Tasks** pane.
3. Enter the **Library Item Name** in the indicated field, or click the **Ellipses** button (...) and select the item from the **Master Item Listing** dialog.
4. If available, enter the item's Serial Number (or any other identifying number, such as an ISBN number for a book).
5. Enter an **Asset Number** if desired.

   Note: If the library item is a network asset (such as hardware or software), you can find this information in the Inventory module.

   The **Status** field displays In, Out, or Overdue.
6. You can enter comments about the item on the **Comments** tab.

   If the General, History, and Comments tabs do not display, see Creating User-defined Views. (These tabs are explained in Loaning Library Items topic).

Next Topic: Loaning Library Items

Loaning Library Items

Checking Out Items

To Check Out Library Items:

1. Select the **Library** module from the **Navigation Pane**.
2. Select the library item in the grid, then click **Check Out Library Item** from the **Tasks** pane (or click the **Check Out** icon on the menu bar).
3. On the **General** tab, the **Check Out Date** automatically displays the current date. You can record a previous date if necessary.
4. Select or enter the **Due date** in the designated field.
   BMC Track-It! will monitor the due date and list the item as Overdue in the Library grid if it is not checked in on time.
5. Select the borrower's name from the **User** drop-down list.
   The User's contact information automatically displays if you have selected the User.
6. Enter any comments as necessary on the **Comments** tab.

   The **History** tab displays details on who borrowed the item, when it was checked out, checked in, etc.

7. Click the **Save** button.

   The **Library** grid displays showing the updated record.

Checking In Items

To Check In Library Items:

1. Select the library item in the grid, then click **Check In Library Item** from the **Tasks** pane (or click the **Check In** icon on the menu bar).
2. Click Yes on the **Check In** confirmation dialog.
   The Item's status changes to **In** and displays on the grid.

Next Topic: Library Reports

Viewing and Printing Library Reports

You can view and print the following Library Reports:

- Library Item Status
- Library History

To View Library Reports:

1. Select **Reports** from the **Navigation Pane**.
2. Select **Library** from the **Reports by Module** drop-down list.
3. The list of reports by module displays. (See Viewing Reports and Printing reports for detailed instructions).

Reports

Reports Overview

In addition to the graphs and pivot grid reports available in the Dashboard module, you can view and print over 100 system reports from various modules in BMC Track-It!, such as Help Desk and Inventory. The reports display in the Crystal Reports XI Viewer. You can export the reports to Crystal Reports XI and create your own customized reports. You can also import and export reports to share with other BMC Track-It! users.

For more information, see the Business Objects support page on their Web site at www.businessobjects.com, and the Crystal Reports XI user guide.

Next Topic: Viewing Reports

Viewing Reports

You can view reports from the **Reports** module. You can also view reports from individual modules such as the Help Desk module. An advantage of viewing the reports from the individual module is that you can filter the records in the grid to your specifications, then select a report.

To View a Report from the Reports Module:

1. Select **Reports** from the **Navigation Pane**.
2. Select a module (such as Help Desk) from the **Reports by Module** drop-down list.
3. The list of reports by module displays.
   The **Reports Source** column displays System View or User-defined report.
4. To preview the report, select the report, then click Preview Report from the Tasks pane.
   You can also right click there report and select Preview Report.
5. On the **Enter Parameter Values** dialog, enter the start date and end date range for the report:

    a. Either enter the date in the **Enter a Value** fields (for Start and End dates) in the format "yyyy-mm-dd" or click the **Calendar** icon and select the date.
    b. To include all dates, click the **No lower value** checkbox.
6. Click the **OK** button.
   The report displays in the Crystal Reports XI viewer, with a graphical representation at the top (such as a bar chart), and details on the subsequent pages.

To View Reports from Individual Modules (Such As Help Desk):

1. Select a module (such as Help Desk), then filter the records in the grid to your specifications. (See Sorting, Filtering, and Grouping Records).
2. Click **Print Report with Filter** on the **Tasks** pane.
3. On the **Reports** dialog, select the report, then click the **Select** button.
   The report displays in the Crystal Reports XI viewer, with a graphical representation at the top (such as a bar chart), and details on the following pages.

To Navigate Report Pages:

1. Use the scroll bar to view the pages, or click the control buttons (Next, Last, Previous, or First page) at the top of the viewer.
2. To view report sections, click the **Toggle Group Tree** icon.
   The report sections display on the left pane of the viewer.
    a. Click an item in the pane to view each section.
    b. Click the Toggle Group Tree again icon to close the pane.
3. Click the page control buttons to navigate through the report.

To Search Report Text:

1. Click the **Find Text** icon.
2. In the Find Text dialog, enter the text in the Find What field, then click the Find Next button.
   If the text is found, it is outlined in red.

Next Topic: Printing reports

Printing Reports

To Print Reports from the Reports Module:

1. Select **Reports** from the **Navigation Pane**.
2. Select a module (such as Help Desk) from the **Reports by Module** drop-down list.
3. The list of reports by module displays.
   The **Reports Source** column displays System View or User-defined report.
4. Click **Print Report** on the Tasks pane.
5. Select options from the **Print dialog**, then click **OK**.
   The report prints directly to your printer.

To Print Reports from Individual Modules (such as Help Desk):

1. Select a module (such as Help Desk), then filter the records in the grid to your specifications. (See Sorting, Filtering, and Grouping Records).
2. Click **Print Report with Filter** on the **Tasks** pane.
3. On the **Reports** dialog, select the report, then click the **Select** button.
4. On the **Enter Parameter Values** dialog, enter the start date and end date range for the report:
    a. Either enter the date in the **Enter a Value** fields (for Start and End dates) in the format "yyyy-mm-dd" or click the **Calendar** icon and select the date.
    b. To include all dates, click the **No lower value** checkbox.
5. Click the **OK** button.
   The report displays in the Crystal Reports XI viewer, with a graphical representation at the top (such as a bar chart), and details on the subsequent pages.
6. Click the **Print** button on the viewer.
7. Select options from the **Print dialog**, then click **OK**.
   The report prints directly to your printer.

Next Topic: Importing and Exporting Reports

Importing and Exporting Reports

You can import and export reports to share with other BMC Track-It! users. You can also export the reports to Crystal Reports XI and create your own customized reports.

Note: BMC Track-It! enables you to create custom reports using Crystal Reports XI, and includes the Crystal Reports Professional Edition.

To Import Reports:

1. Select **Reports** from the **Navigation Pane**.
2. Select a module (such as Help Desk) for the type of report from the **Reports by Module** drop-down list.
   When the report is imported, it will be available from the selected module.
3. Click **Import Report** from the **Tasks** pane.
4. Click the **Browse** button to find the file on your directory.
5. Enter a name for the report in the **Report Title** field
   The file name displays with a .rpt extension (indicating a Crystal Report) in the **File name of report** field.
6. Click the **Save** button.
   The imported report displays as a User-created Report in the specific module grid (such as Help Desk) in the **Reports** module. It also displays on the Reports menu in the individual module (see Viewing Reports from Individual modules in Viewing Reports).

To Export Reports:

1. Select the report you want to export from the **Reports** module, then click the **Export Report** from the **Tasks** pane.
   You can also preview the report, then click the **Export Report** button from the **Crystal Reports XI viewer**.
2. On the **Save As** dialog, navigate to the folder in your directory where you want to export the report.
3. Enter a name for the report in the **File Name** field.
4. Select the type of file for the report from the **Save As Type** drop-down list (such as .rpt, .xls, etc.).
5. Click the **Save** button.
6. Click **OK** when the **Export Completed** message displays.

Next Topic: Customizing Reports

Dashboard: Working with Graphs and Pivot Grids

Viewing Help Desk Metrics with the Dashboard (Overview)

The BMC Track-It! Dashboard summarizes and organizes large amounts of your BMC Track-It! work order data into reports and Key Performance Indicators (KPIs) in the form of graphs (bar and pie charts) and pivot grids (interactive tables). BMC Track-It! analyzes the data and displays status and trends including Overdue Work Orders by Technician and Priority, and Service Level Agreement Fulfillment. You can customize the charts and pivot grids to your specifications using the Configuration Panel. For example, you can filter the Technicians field to only display certain Technicians or Technician Groups by a specific Work Order Type, such as Telecom or Network. You can view one graph or pivot grid at a time on the Dashboard. However, Track-It's customizable Home Page can display two additional Dashboard graphs that you select.

Caution: Reports security is not implemented for the **Dashboard** module (graphs and pivot grids). If your Technicians have access to the Dashboard module, they will be able to view all System Dashboard graphs and pivot grids, as well as the two default Dashboard graphs (Overdue Work Orders and Work

Order Activity This Month) on their Home Page. To set Dashboard security, see Restricting Privileges by Module in the Administrator's Guide.)

The following graphs and pivot tables are shipped with BMC Track-It!:

Note: The graphs and pivot tables display a trend over a period of time.

- Open Work Orders
- Work Order Activity
- Work Orders Closed within 1 Hour (Work Orders closed within one hour of creation)
- Overdue Work Orders
- Problem Analysis (Work Orders by Type)
- Service Level Agreement Work Order Status
    - Open SLA Violations (by due date)
    - SLA Work Orders in Alarm State (not completed by Service Level Agreement specified time or date)
    - SLA Fulfillment (Work Orders where the Service Level Agreement was not met)

The graphs and pivot grids are explained in detail below:

System View (Help Desk)	Description	Available Measures	Default View
Open Work Orders	▪ Open Work Orders ▪ Point in time	▪ Work Order Count ▪ Average Work Hours Overdue ▪ Work Hours Open	Open Work Orders count grouped by Assigned Technician and Priority
Work Order Activity	▪ Work Orders opened and closed for a time interval ▪ Trend (Time interval) ▪ Within one year	• Active Work Order day balance count • Closed Work Order count • New Work Order count • Work hours to close count	Active Work Orders grouped by Priority
Work Orders Closed within 1 Hour	▪ Work Orders closed within one hour of creation ▪ Trend (Time interval) ▪ Within one year	▪ First Call Closed Count ▪ First Call Work Hours to Close Count (average number of work orders that were closed within an hour)	First Call Closed count grouped by Technician and Time Interval
Open SLA Violations	▪ Work Orders that have not been closed by the SLA Due Date ▪ Point in time	▪ Work Orders Open ▪ Work Orders Overdue ▪ Work Order Count	Work Order Group count grouped by SLA Name and Technician

Overdue Work Orders	▪ Open Work Orders that have not been closed by the Due Date ▪ Point in time	▪ Overdue Work Order Count ▪ Work Hours Overdue (average time overdue)	Overdue Work Order count grouped by Priority and Technician
Problem Analysis	▪ Work Orders by the top 10 problem Types ▪ Trend (Time interval) ▪ Within one year	▪ Active Work Order Day Balance Count ▪ Closed Work Order Count ▪ New Work Order Count ▪ Work Hours to Close Count	New Work Order count grouped by Type
SLA (Service Level Agreement) Work Orders in Alarm State	▪ Work Orders not completed by Service Level Agreement specified time or date) ▪ Point in time	▪ Work Hours Open ▪ Work Hours Since Alarm ▪ Work Order Count	Work Order count grouped by SLA name and Technician
SLA Fulfillment	▪ Work Orders not meeting the Service Level Agreement ▪ Trend (Time interval) ▪ Within one year	▪ Average Unfulfilled Work Orders ▪ Fulfilled Service Level Agreement at Close Count ▪ Percent Fulfilled Work Orders ▪ Unfulfilled Service Level Agreement at Close Count	Percent Fulfilled Work Orders grouped by department and time interval

Next Topic: Viewing Help Desk Graphs with the Dashboard

Help Desk Graphs

Viewing Help Desk Graphs with the Dashboard

The Help Desk graphs display the Key Performance Indicators of your Help Desk, such as Work Orders not completed by Service Level Agreement time or date and Work Orders by type. Depending on the graph, the analysis is point in time or by time interval (such as the number of Work Orders closed within one hour of creation this month. The graphs display the same information as the pivot grids, but as bar or pie charts.

You can customize the graphs (using the Configuration Panel) by type, measure, category, and time interval. You can further customize them by filtering the information (such as by certain Technicians or Work Order types). You can copy, print, export, and share the graphs as well.

For a detailed description of the graphs, see Viewing Help Desk Metrics with the Dashboard (Overview).

To View a Graph:

1. Select the **Dashboard** module from the **Navigation Pane**.

2. Select the graph from the **View** menu (e.g., **Current View/Help Desk/System Views/Overdue Work Orders**).

Default Graphs

The default graph display as bar charts with pre-formatted categories and time intervals; however you can customize them. See Customizing Graphs (Dashboard).
To Clear Filters and View the Default Graphs:

1. Select **Abandon Changes to Current View** from the **View** drop-down list at the top of the graph. This returns the graph to the default system view.

Next Topic: Filtering Help Desk Graphs (Dashboard)

Customizing Graphs (Dashboard)

You can customize the graphs using the Configuration Panel by type, measure, category, and time interval (depending on the graph):

Graph Attributes	Options
Graph Type	Bar or Pie
Graph Sub Type	Side by Side Bar or Stacked Bar
Time Period	Displays a specific period of time, e.g., This Month
Measure (Y Axis)	Count, average, or percentage. Varies per chart. (e.g., Work Order count)
Category Type	Time Interval or Field Value
Category (X Axis)	Time Interval or Field Values
Sub Category (X Axis)	Field Values

To Customize a Graph:

1. If the **Configuration Panel** is not displayed, click the tab to the right of the graph to display it. The Configuration Panel displays the settings for the options described in the table above (such as Chart Type and Category).
2. Select the options you want to display for your customized chart. In a few seconds, the chart displays as a color-coded bar or pie chart. You can also filter the graph (see Filtering Help Desk Graphs (Dashboard).

To Save Your Customized Graph:

1. Once you have customized your graph, select **Save Current View As** from **Current View** on the menu bar.
2. On the **Save Current View As** dialog, enter a name for your graph, then click the **Save** button.
3. To access your customized graph at a later time, select it from the **Help Desk** option from the **Current View** on the menu bar.

   A customized (or filtered) graph or pivot grid that has been initially saved, then modified, will display an asterisk (*) after the name, such as Overdue Work Orders*. (System graphs and pivot grids that have been modified will also display the asterisk. See below to return them to their default state).

To Share Your Customized Graph:
See Exporting and Importing Views.

To Clear Filters and View the Default Graphs:

1. Select **Abandon Changes to Current View** from the **View** drop-down list at the top of the graph. This returns the graph to the default system view.

Next Topic: Filtering Help Desk Graphs (Dashboard)

Filtering Help Desk Graphs (Dashboard)

You can filter the data in a graph to limit the data. For example, you might only want to view Overdue Work Orders for certain Technicians or Technician Groups.

Note: The values in the **Filter by** drop-down list depend on the type of graph.

To Filter a Graph:
This example will show how to view the graph by specific Technician Groups.

1. Select the graph you want to filter from **View** menu (e.g., **Current View/Help Desk/System Views/Overdue Work Orders**).
2. If the **Configuration Panel** is not displayed, click the tab to the right of the graph to display it.
3. Click the **Filter** button at the bottom of the **Configuration Panel**.
4. The **Filter** dialog displays. Select a Category name (field name), e.g. Technician Assigned, beneath **"Filter by**".
5. Select a comparison type from the middle drop-down list (e.g. "equals" or "like").
6. Enter or select a comparison value from the value drop-down list (e.g. Network Group).
7. Select And or Or from the drop-down list (e.g. to view a graph with both the Network Group and the Desktop Group, select Or.
8. If you want to set additional conditions, repeat steps 4-6, then click the **and/or** button, and select "and" or "or" from the drop-down list.
   You can continue step 8 to filter on multiple conditions.
9. Click the **Accept** button to save the custom filter and filter the graph.
   The grid displays only the records that meet the condition(s) of your filter. In this example, graph displays the number of Overdue Work Orders for the Network Group and the Desktop Group.

To Clear the Custom Filter:
1. Click the **Filter** button.
2. Click the **Delete** button on each row of the **Filter** dialog.

A customized (or filtered) graph or pivot grid that has been initially saved, then modified, will display an asterisk (*) after the name, such as Overdue Work Orders*. (System graphs and pivot grids that have been modified will also display the asterisk. See below to return them to their default state).

To Clear Filters and View the Default Graphs:
1. Select **Abandon Changes to Current View** from the **View** drop-down list at the top of the graph. This returns the system graph to the default system view, and a customized graph to its last saved state.

Next Topic: Printing Graphs and Pivot Grids from the Dashboard

Help Desk Pivot Grids

Viewing Help Desk Pivot Grids with the Dashboard

A Pivot Grid is an interactive table that you can customize based on fields and data in your BMC Track-It! database to summarize Help Desk Work Order data. The pivot grids display the same information as the Dashboard graphs (such as Problem Analysis-Work Orders by Type). However, the pivot grids are a matrix format with actual data that recalculates depending on way you select the measure, arrange the fields, and apply filters (e.g. Technicians in rows and Months in columns). You can view more dimensions (categories of information) at a time in a pivot grid than with a graph.

You can filter the data as with the Dashboard charts. For example, if you want to see only certain Work Order types, you can filter the Type field. You can view system pivot grids and move the data back to the default view with the click of a button. You can also save customized pivot grids, print, and import and export them to share with other BMC Track-It! users.

For a detailed description of the graphs, see Viewing Help Desk Metrics with the Dashboard (Overview).

An example of the Overdue Work Order Count pivot grid, grouped by Priority and Technician, then filtered by Technician, Priority, Department, and Type is displayed below:

Overdue Work Order Count		TECHNICIAN	PRIORITY		
		*Desktop Group	*Network Group	Telecom Group	Grand Total
DEPARTMENT	TYPE	4-Low	1-Critical	3-Medium	
Executive	Hardware	1		2	3
Executive Total		1		2	
Sales	Hardware				
	Network	3		2	5
	Telecom		5		5
Sales Total		3	5	2	
Grand Total		4	5	2	13

Overdue Work Order Count Pivot Grid

See the tutorial with examples on customizing a pivot grid (Pivot Grid Tutorial: Customizing Problem Analysis Pivot Grid). See Customizing Pivot Grids (Dashboard) for step-by-step instructions.

To View a Pivot Grid:

1. Select the **Dashboard** module from the **Navigation Pane**.
2. Select the pivot grid from the **View** menu (e.g., **Current View/Help Desk/System Views/Overdue Work Orders Pivot (PIT**).

To View Specific Cell Data (e.g. Work Orders) from the Data Area:

1. Double click a cell containing data.
   The **Pivot Drill Across** dialog displays a **Work Order** grid containing the actual Work Orders reported on the pivot grid.
2. Double click a **Work Order** to open it.
   (You can keep the Pivot Drill Across dialog open while you view others from the pivot grid).

Default Pivot Grids

The default pivot grids display as tables with pre-configured measures, time intervals, and fields as rows and columns. However you can customize them. See Customizing Pivot Grids (Dashboard)
To Clear Filters and View the Default Grids:

1. Select **Abandon Changes to Current View** from the **View** drop-down list at the top of the graph. This returns the system pivot grid to the default system view, and a customized pivot grid to its last saved state.

Next Topic: Pivot Grid Tutorial: Customizing Problem Analysis Pivot Grid

Pivot Grid Tutorial: Customizing Problem Analysis Pivot Grid

For those unfamiliar with pivot tables, the following tutorial will help you understand the basics of pivot grids and walk you through manipulating data in a pivot grid in BMC Track-It! We'll customize a **Problem Analysis** pivot grid to show the **New Work Order Count** grouped by **Type**, **Department**, and **Location**.

Pivot Grid Elements

The pivot grid is an interactive table that you can customize based on fields and data in your BMC Track-It! database. It is comprised of the following elements:

Element	Description
Row Field	A field from your database that you place as a row in the pivot grid, e.g. "Type". You can create different views of the data by dragging the fields to the row or column areas of the pivot grid.
Column Field	A field from your database that you place as a column in the pivot grid, e.g. "Dept" or "Month". You can create different views of the data by dragging the fields to the row or column areas of the pivot grid.
Filter Field	A field from your database that you place as a filter in the pivot grid to show only specific values of the field, e.g. the specific technician's name from the "Technician" field.
Data Item	A measure (such as a "count") that recalculates the data depending on the pivot grid view.
Data Area	Cells in the grid that contain the data from your database. Point-in-Time pivot grids enable you to "drill across" and access the actual Work Orders from the numbers in the data area.
Item	A subcategory of a row or column field, e.g. Sales, Executive, and Engineering are Items for the Department field.

Below is a representation of a pivot grid identifying its elements:

Drop Filter Fields Here

Drop Data Items Here — Drop Column Fields Here

New Work Order Count

Drop Row Fields Here — Dept

Type	Sales (Item)	Executive	Engineering	Grand Total
Telecom	55	2	0	57

Grand Total	55	2	0	57
Data Area				
Pivot Grid Elements				

The following steps explain how to:

1. Determine What Questions You Need to Answer about your Help Desk
2. Select a System Pivot Grid as a Starting Point
3. Customize the Relevant Pivot Grid to Display the Actual Numbers You Need
   - Select a Time Interval and Measure
   - Filter the Pivot Grid
   - Select Fields for the Columns in the Grid
4. Save the Pivot Grid.
5. Print, Copy, or Export the Pivot Grid
   - Print the Pivot Grid
   - Export the Pivot Grid to Excel

Step 1: Determine What Questions You Need to Answer about Your Help Desk.

Depending on the pivot grid, you can answer questions based on measures (counts) and fields related to your BMC Track-It! data. (See Viewing Help Desk Metrics with the Dashboard (Overview) for detailed information which measures, fields, and other information is available for each chart and grid).

Available Measures and Fields to Create Graphs and Pivot Grids for Help Desk (Depending on the Graph or Pivot Grid)	
Measures	**Fields**
• Active Work Order Day Balance Count • Average Unfulfilled Work Orders • Closed Work Order Count • First Call Work Hours to Close Count • New Work Order Count • Unfulfilled SLA at Close Count • Work Hours Open • Work Hours Overdue • Work Hours Since Alarm • Work Hours to Close Count	• Activity Date • Category • Department • Location • Lookup 1 • Lookup 2 • Priority • SLA (Service Level Agreement) • Status • Subtype • Task Location • Technician

Let's start with a simple question. Suppose an executive in your organization suspects that the reason sales figures are down is because the new telephone system has not been working properly since it's been installed. He asks you how many calls your Help Desk has received for telephone-related problems in the past month.

Step 2: Select a System Pivot Grid as a Starting Point.

1. Familiarize yourself with the different types of charts and pivot grids in the Dashboard module. (See Viewing Help Desk Metrics with the Dashboard (Overview) for detailed information on each chart and grid).
2. For this example, we'll look at the Problem Analysis graph in the Dashboard module. We can see from the bar chart that there are more telephone-related Work Orders in the past month than any other type of problem, with over 50 Work Orders. We've added a sub-category to the graph to look at which departments have called to report the problem, and discovered that most of the calls did, in fact, come from the Sales department. Now we'd like to report on the actual numbers by using a pivot grid.

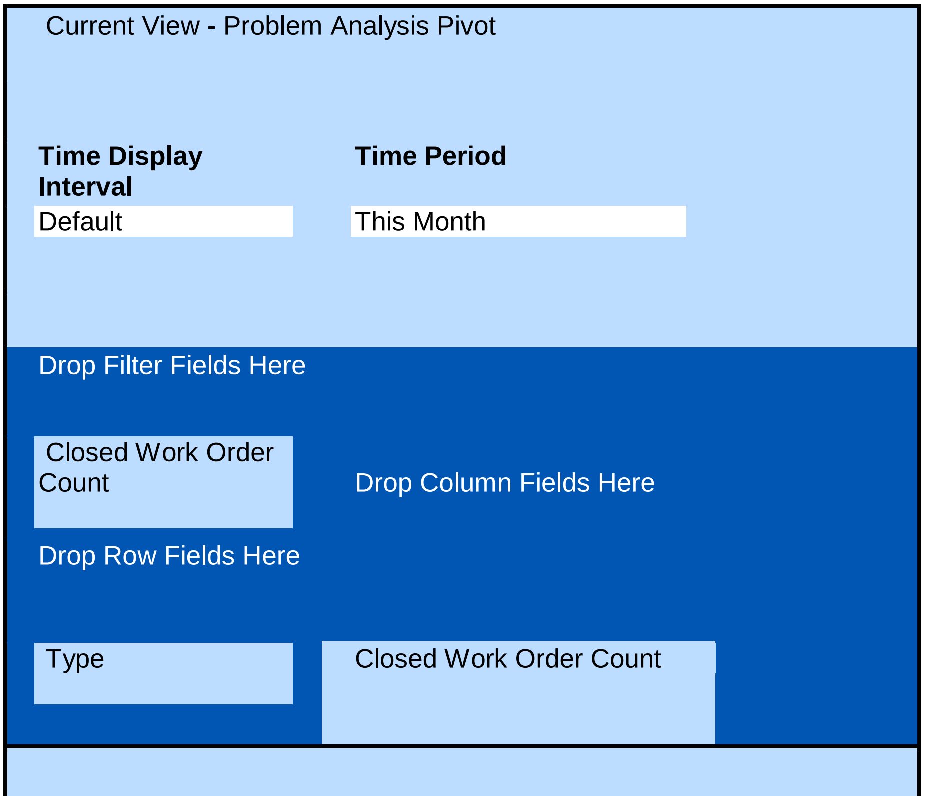
Step 3: Customize the Relevant Pivot Grid to Display the Actual Numbers You Need.

We'll manipulate the **Problem Analysis** pivot grid to show the **New Work Order Count** grouped by **Type**, **Department**, and **Location**.

a. Select a Time Interval and Measure

Note: Pivot grids can display trends (Time Interval) or a specific point in time.

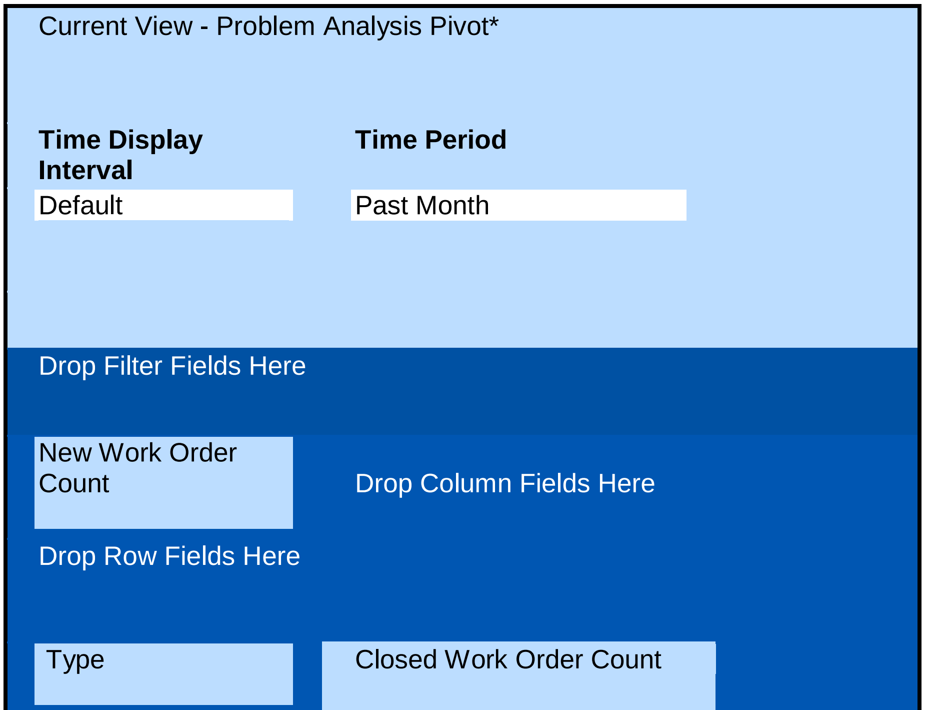
1. From the **Dashboard**, we'll select the **Problem Analysis** pivot grid.
   The default pivot grid shows "**Closed Work Order Count**" with a time period of "**This Month**".



Default Problem Analysis Pivot Grid

2. We're only interested in the past month, so we'll change the **Time Period** drop-down to **Past Month**.

3. We don't need to know the ***Closed* Work Order Count** at this time, so we'll change the measure to ***New* Work Order Count**. Notice the asterisk (*) after the **Current View** name. This indicates a customized grid.



Customized Problem Analysis Pivot Grid

4. To change the measure (the count of Work Orders), we need to display the Field list, so we right click on the pivot grid to display the **Field List** dialog.

5.

Pivot Grid Field List
X

Drag Items to the Pivot Grid

Active Work Order Day Balance Count
Activity Date
Category
New Work Order Count
Lookup 1
Lookup 2
Technician
Priority
SLA Name
Sub type
Work Hours to Close Count

Add to Data Area

5. We want to remove the **Closed Work Order Count** data item from the **Data Items** area of the pivot grid (where it says **Drop Data Items Here**), so we drag it to the **Field List** dialog.

6. Then we drag the **New Work Order Count** field from the **Field List** dialog to the **Data Items** area.

Drop Filter Fields Here		
Drop Data Items Here New Work Order Count	Drop Column Fields Here	
Drop Row Fields Here		
Type	New Work Order Count	
Telecom	57	
Desktop	25	
Network	10	
Grand Total	92	

Customized Problem Analysis Pivot Grid

We can immediately see in the pivot grid that there are 57 new Work Orders in the Telecom type, 25 for Desktop Applications, and 10 for Network for the past month, with a grand total of 92 new Work Orders.

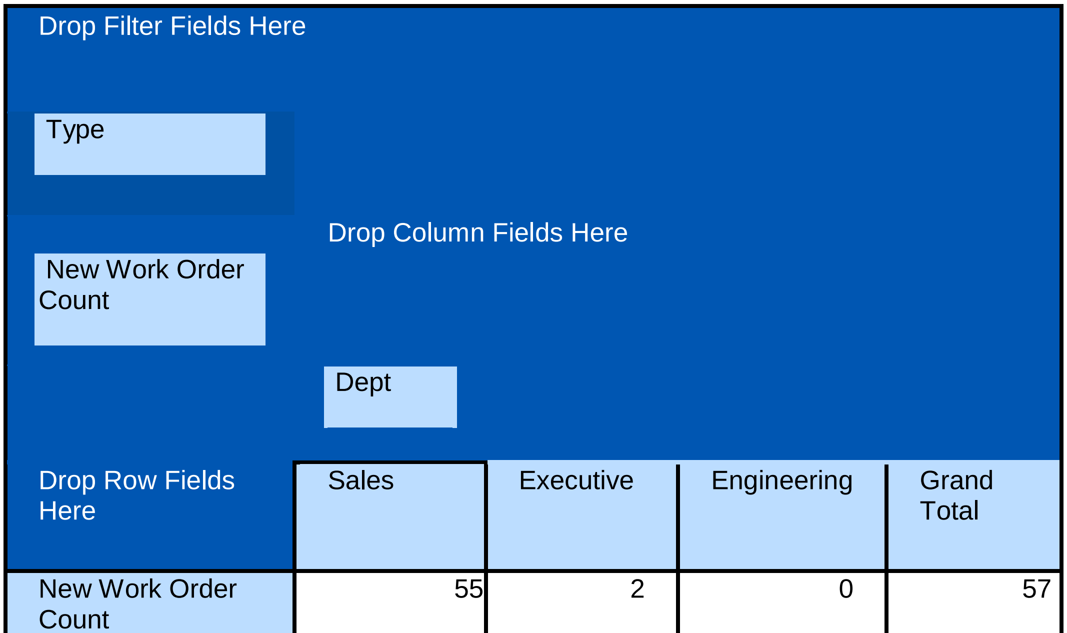
b. Filter the Pivot Grid.

1. We're only interested in Telecom, so we'll filter out the rest of the **Types**. We'll do this dragging the Type field to the **Filter Field** area.
2. Then we'll de-select all of the types from the **Filter** drop-down on the **Type** field. Then we'll select only the Telecom type.

Now only the Telecom type filter field displays with an updated New Work Order Count in the data cell.

c. Select Fields for the Columns in the Grid.

1. Since we need to know how the Sales department was affected by the telephone problems, we'll look at how many Work Orders there were by **Department**. We'll drag the **Department** field from the **Field List** dialog to the right of the **New Work Order Count** field in the column area.



Customized Problem Analysis Pivot Grid

We can see in the Department column that 55 Work Orders came from the Sales department, and two came from Executives.

2. We'd like to filter the list to only show the Sales department, so we'll filter out the rest of the departments. We'll do this by de-selecting all of the departments from the **Filter** drop-down on the **Department** field, then we'll select Sales.
3. We have Sales representatives in several **Locations** all over the country, and we want to pinpoint which location reported telephone problems. We'll do this by dragging the **Locations** field to the right of the **Department** field in the column area.

Drop Filter Fields Here			
Type New Work Order Count	Drop Column Fields Here		
	Dept	Location	
Drop Row Fields Here	Sales		
	Tampa	New York	Sales Total
New Work Order Count	2	55	57

Customized Problem Analysis Pivot Grid

Now the two Sales locations that reported telephone problems (Tampa and New York) are displayed in columns, and you can see that the New York Sales department had the most telephone issues.

You can continue to create different views of the data by dragging the fields from the **Field List** dialog to the row or column areas of the pivot grid.

Step 4: Save the Pivot Grid.

Now we'll save the customized pivot grid so that we can later select it from the pivot grid list, export it, and share it with other BMC Track-It! users.

a. Select **Save Current View As** from **Current View** on the menu bar.
b. On the **Save Current View As** dialog, we'll enter a name for the pivot grid (we'll call it "Telecom Sales Problem Analysis"), then click the **Save** button.

Step 5: Print and Export the Pivot Grid.

Now you can report to your executive that the New York Sales department submitted 55 Work Orders in the past month due to telephone problems which probably affected their sales performance. We'll print the pivot grid and also export it to Excel. You can also copy and paste an image of the grid into a document. See Printing and Exporting Graphs and Pivot Grids from the Dashboard.

a. Print the Pivot Grid.

1. Click **Print KPI** on the **Tasks** pane.

2. The **Preview** window displays. Click the **Print** button.
   The Windows **Print** dialog displays. Select options and click the **Print** button.
   An image of the pivot grid is sent to your printer.

b. Export the Pivot Grid to Excel.

1. Click **Print KPI** on the **Tasks** pane.
2. From the **Preview** dialog, select **Export** from the **File** menu or the **Export Document** drop-down on the toolbar.
3. Select **Excel**.
4. The Windows **Save As** dialog displays. Enter a name for the file and save it to your desired location, then click the **Save** button.
   You can now open the pivot grid in Excel.

Next Topic: Customizing Pivot Grids (Dashboard)

Customizing Pivot Grids (Dashboard)

You can customize the Pivot Grids by selecting the measure, arranging the fields, and applying filters. For an example of customizing a pivot grid, see the Pivot Grid Tutorial: Customizing Problem Analysis Pivot Grid

There are a few basic steps to customize a pivot grid, as explained in the Pivot Grid Tutorial in the previous topic.

1. Determine What Questions You Need to Answer about your Help Desk
2. Select a System Pivot Grid as a Starting Point
3. Customize the Relevant Pivot Grid to Display the Actual Numbers You Need
   - Select a Time Interval and Measure
   - Select Fields for the Row, Column, Filter, and Data Areas of the Grid
   - Filter the Pivot Grid
4. Save the Pivot Grid.

Determining What Questions You Need to Answer about your Help Desk

Depending on the pivot grid, you can answer questions based on measures (counts) and fields related to the Help Desk. (See Viewing Help Desk Metrics with the Dashboard (Overview) for detailed information which measures, fields, and other information is available for each chart and grid). See an example in Pivot Grid Tutorial: Customizing Problem Analysis Pivot Grid.

Selecting a System Pivot Grid as a Starting Point

1. Select the **Dashboard** module from the **Navigation Pane**.
2. Select the pivot grid from the **View** menu (e.g., **Current View/Help Desk/System Views/Problem Analysis Pivot**).

Customizing the Pivot Grid

To Select a Time Interval and Measure:

Note: Pivot grids can display trends (Time Interval) or a specific point in time.

1. If you want the pivot grid to display a count (or average, depending on the pivot grid) in each cell of the pivot grid data area, select an option from the **Time Period** drop-down list.
   The pivot grid displays a summarized sub-total in each data cell.
2. If you want the pivot grid to display specific dates, months, years, etc., as columns: Select an option from the **Time Display Interval** drop-down list, then
3. Drag the **Activity Date** field from the **Pivot Grid Field List** dialog to the **Column** area of the pivot grid.

The pivot grid displays a column for each Time Display Interval (such as each month or year).

(See Select Fields for the Row, Column, Filter, and Data Areas of the Grid, below, for details on using the **Pivot Grid Field List** dialog).

Selecting Fields for the Row, Column, Filter, and Data Areas of the Pivot Grid

The **Pivot Grid Field List** dialog displays a list of Measures and Fields available for each pivot grid.
To Select Fields with the Pivot Grid Field List dialog:

1. Right click in the pivot grid header area, then select **Show Field List**.
   Click and drag the borders of the **Pivot Grid Field List** dialog to view all of the available fields.
2. To select the fields, either:
   a. Drag the field to the row, column, or data item areas on the pivot grid, or
   b. Select the field, then select an option (such as Row Area or Column Area) on the drop-down next to the **Add to** button at the bottom of the **Pivot Grid Field List** dialog, then click the **Add to** button.

   Note: An "X" will display on the Field if you try to place it in an invalid area.
3. To hide a field from the pivot grid, right click the field and select **Hide**, or drag the field back to the **Pivot Grid Field List** dialog.
4. To move a field, right click the field and select an option from the **Order** list (such as Move to Right).
5. To hide the field list, click the close button on the **Pivot Grid Field List** dialog, or right click the grid header and select **Hide Field List**.

Filtering the Pivot Grid Fields

There are two ways to filter data in a pivot grid:

1) By placing a **Field** in the **Filter Area** of the pivot grid, then selecting items from its **Filter list**, and/or by
2) Selecting items from a **Row** or **Column Field**'s **Filter list.**

To Filter Fields Using the Filter Area of the Pivot Grid:

1. Drag a **Field** from the **Pivot Grid Field List** dialog (such as **Priority**) to the **Filter Area** of the pivot grid.
2. Click the **Filter** drop-down on the **Field** button.
3. Check the items you want to display from the **Filter** list (such as Critical or Urgent from the **Priority** field), then click the **OK** button.
   The summarized count is displayed in the data cell based on the selected filter.

To Filter Row and Column Fields:

Repeat Steps 2-3 above.

Refreshing the Pivot Grid Data

Typically, the database automatically updates the data that displays in the pivot grids every 15 minutes. If you have been working with a grid for a longer amount of time, you can refresh the data.

To Refresh the Pivot Grid Data:

1. Right click the grid header and select **Refresh Data**.
   If the data in the database has changed, it will be reflected in the data cells.

Clearing Filters

To Clear Filters and View the Default Grids:

1. Select **Abandon Changes to Current View** from the **View** drop-down list at the top of the graph.
   This returns the a system pivot to the default system view, and a customized pivot grid to its last saved state. A customized (or filtered) graph or pivot grid that has been initially saved, then modified, will display an asterisk (*) after the name, such as Overdue Work Orders*. (System graphs and pivot grids that have been modified will also display the asterisk).

To Save Your Customized Pivot Grid:

1. Once you have customized your Pivot Grid, select **Save Current View As** from **Current View** on the menu bar.
2. On the **Save Current View As** dialog, enter a name for your Pivot Grid, then click the **Save** button.
3. To access your customized Pivot Grid at a later time, select it from the **Help Desk** option from the **Current View** on the menu bar.

To Share Your Customized Pivot Grid:
See Exporting and Importing Views.

Next Topic: Printing and Exporting Graphs and Pivot Grids from the Dashboard

Printing and Exporting Graphs and Pivot Grids from the Dashboard

You can copy print, customize, export, and e-mail graphs and pivot grids with the Dashboard **Preview** dialog.

To Copy a Graph to the Clipboard:

1. Select the graph you want to print from **View** menu (e.g., **Current View/Help Desk/System Views/Overdue Work Orders**).
2. Right click anywhere on the graph and select Copy to Clipboard.
3. Open the desired application (such as a word processing program) and paste it into the document.
   An image of the graph displays.

To Print a Graph or Pivot Grid:

1. Select the graph or Pivot Grid you want to print from **View** menu (e.g., **Current View/Help Desk/System Views/Overdue Work Orders**).
2. Click **Print Current View** on the Tasks pane, or click the **Print** icon on the toolbar.
3. The **Preview** window displays. Click the **Print** button.
   The Windows **Print** dialog displays. Select options and click the **Print** button.

To Show or Hide Titles, Labels and Legends, and Rotate the Graph:

1. Right click anywhere on the graph and select Copy to Clipboard.
2. The Preview displays the graph with your selected options.

To Export a Graph or Pivot Grid:

1. Select the Graph or Pivot Grid, then click **Print Current View** on the Tasks pane, or click the **Print** icon on the toolbar.
2. From the **Preview** dialog, select **Export** from the **File** menu or the **Export Document** drop-down on the toolbar.
3. Select the type of file you want to export: PDF, HTML, Excel, Rich Text, or Graphic.
4. The Windows **Save As** dialog displays. Enter a name for the file and save it to your desired location, then click the **Save** button.

To E-mail a Graph or Pivot Grid (Image):
You can e-mail a graph or pivot grid image (PDF or bitmap) from the **e-mail** icon. If you want to e-mail a file, see **To Export a Graph or Pivot Grid** above.

1. Select the Graph or Pivot Grid, then click **Print Current View** on the Tasks pane, or click the **Print** icon on the toolbar.
2. From the **Preview** dialog, click the **E-mail** icon on the toolbar.
3. Select the type of file you want to e-mail. You can e-mail PDF or Graphic (bitmap).
4. The Windows **Save As** dialog displays. Enter a name for the file, then click the **Save** button.

Your e-mail editor opens (such as Microsoft Outlook) with the file attached.

Change Management: Managing Requests for Change

Change Management Overview

Track-It!'s 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! Web. Automatic notifications can be set up so that Approvers and Technicians are notified about specific events in the Request for Change's lifecycle.

Change Management Roles
The individuals involved in the Change Management process are:

BMC Track-It! Administrator
The BMC Track-It! Administrator sets up Change Management Policies, automatic e-mail notifications, and permissions for Technicians and Approvers.

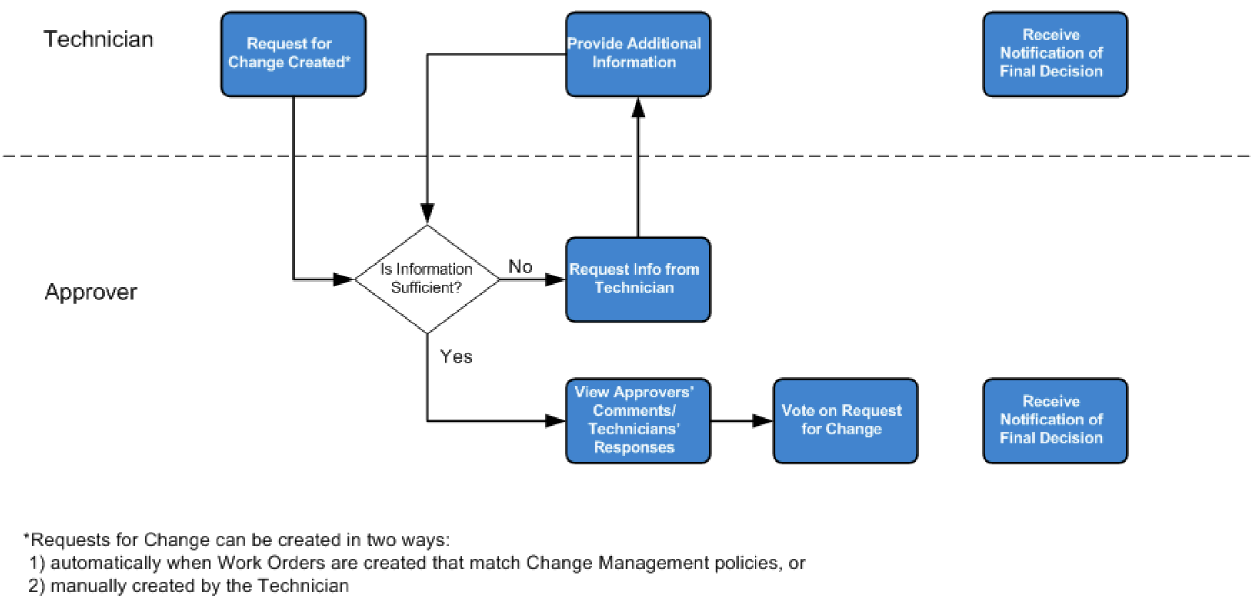
Track-It! Technicians
The Technician can manage the Request for Change from either the Change Management module or from the Change Management tab on the Work Order.

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.

Change Management Workflow

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



Managing Requests for Change (Technicians)

You can manage Requests for Change from the Change Management module or from the Help Desk module. In the Help Desk grid, Work Orders that are associated with a Request for Change in the Change Management module can be identified by enabling the *RFC Status* column. These Work Orders will display with an RFC Status such as Approved, Rejected, or Pending Approval. You can manage the Request for Change by opening the Work Order and selecting the Change Management tab.

To enable the **RFC Status** column, right click anywhere on the grid, then select **Customize**. In the **Customize Grid** dialog (**Columns** tab), select **RFC Status** from the list, then click the **Add** button. For more information, see Showing and Hiding Columns.

See also: Change Management Overview

To View Requests for Change from the Change Management Module:

1. Select the **Change Management** module from the **Navigation Pane** of the **BMC Track-It! Technician Client**.
   Note: Overdue Requests for Change are highlighted.
2. Double click to open a **Request for Change** in the grid.

To View Requests for Change from the Help Desk Module (Work Order):

1. Open the **Help Desk** module. Work Orders associated with a Request for Change are those displaying a status in the **RFC Status** column.
2. To view details, open the Work Order, then select the **Change Management** tab.

   The following information is displayed:

- Policy Name (e.g., Training Requests)
- Decision Due Date
- Status (e.g., Pending Approval, Pending Technician Response, Approved, Rejected, or Canceled)
- Approvals Required
- Decision Completed (date)
- Policy Type (Simultaneous or Sequential)
- Approvers
    - Approver (name)
        - Comments - **Expand (+)** button
    - Status (Evaluating, Pending Technician Response, Pending Prior Approval, Approved, or Rejected)
- Actions
    - Open Review History
    - Respond to Reviewer
    - E-mail Approver
    - Change Approver

To View an Approver's Comments:

1. To view the Approver's comments, click the **Expand (+)** button next to the Approver's name, **OR**
2. Click the **Open Review History** button next to the Approver's name.
3. You can also select the **Approver's name**, then double click it or press the **Enter** key.

To Respond to an Approver's Request for Information:
You can respond to an Approver's request for information via the Change Management module or the Work Order in BMC Track-It! Technician Client.

1. On the **Request for Change** dialog (or the **Change Management** tab of the Work Order), click the **Respond** icon in the **Actions** column in the **Approvers** section (the icon is enabled if an Approver has requested information).
2. On the **Response Details** dialog, enter your response in the text box, then click the **Send** button. The response and request display on the **Change Management** tab in the Work Order as well as the **Request for Change** dialog in the Change Management module.

To E-mail Approvers:

1. To e-mail an individual Approver (who has not yet voted), click the **E-mail Approver** icon next to the **Approver's name** in the **Actions** column.
2. To e-mail all Approvers at once (who have not yet voted), click the **E-mail Approvers** button at the bottom of the **Change Management** tab.

To Change Approvers:
Note: You can only change Approvers if they have not yet voted on the RFC (approved or rejected).

1. Click the **Change Approver** icon next to the **Approver's name** in the **Actions** column of the **Approvers** section.
2. On the **Find Approver** dialog, enter the name of the new **Approver**, then click the **Search** button.

   Note: You can also press the **Search** button without entering a name, and all Users except those already selected as Approvers for the Request for Change will display.
3. Select the **User's name**, then click the **Select** button.
4. The **Search Requestor** dialog closes, and a **Change Approver** confirmation message displays.
5. If you're sure you want to change the Approver, click the **Yes** button.

   If configured, a notification will be sent to the new Approver (see Configuring Notifications for Change Management Events in the Administrator's guide).

To View the Request for Change's Review History:

1. The **Review History** dialog contains the Approver's and the Assigned Technician's comments, including rejection reasons. The report also displays details when a Technician changes an Approver.
2. Click the **Open Review History** button next to the Approver's name.

   You can also view this information on the printed Request for Change.

Manually Creating a Request for Change

When Work Orders are created that match Change Management policies, they are automatically entered into the Change Management process. However, BMC Track-It! Technicians can manually create a Request for Change, which also creates the associated Work Order. You may want to manually create a Request for Change so that you can quickly enter it into the change management process without waiting for a Work Order to match the criteria from the Change Management Policy.

Note: In order for BMC Track-It! Technicians to manually create a Request for Change, the BMC Track-It! Administrator must grant permission to the Help Desk module on the Technician's security policy, and permission to "View Requests for Change" under "Change Management" on the Technician's security policy. See Allowing Technicians Access to the Change Management Module in the Administrator's Guide.

See also: Change Management Overview
To Manually Create a Request for Change:
1. Select the **Change Management** module from the **Navigation** pane.
2. Select **New Request for Change** from the **Tasks** pane in the **Change Management** module.
3. In the **Summary** field, enter a brief description of the **Request for Change**.
4. Select a **Change Management Policy** from the **Policy Name** drop-down list.
   Note: Once a Change Management Policy has been selected, it cannot be changed for the associated Work Order.
5. Click the **OK** button.
6. The new Work Order will only be populated with the Summary field. Enter any other necessary information (Work Order Type, for example), then click the **Save** button.

   The Change Management tab displays details for the associated Request for Change.

Viewing an Approver's Request for Change History

The **Review History** dialog displays the Approver's voting history (approval or rejection), requests for information, and the Technician's response in descending chronological order. The date and time for each item is also displayed. You can respond to an Approver's request for information from this dialog.

The Review History dialog can be accessed from the **Request for Change** dialog in the **Change Management** module, or from the **Change Management** tab on the Work Order.

The Review History for all Approvers and the Technician is displayed on the printed version of the Request for Change (see Printing Requests for Change).

See also: Change Management Overview
To Respond to an Approver's Request for Information:
1. On the **Review History** dialog, click the **Respond** button, enter your comments in the **Response** text box, then click the **Save** button.

   Your response displays on the following:
   - The **Review History** dialog (under **Technician's Response**) along with your user name

  - The **Comments** section on the RFC in **BMC Track-It! Web**
  - The printed version of the RFC.

2. Click the **Close** button to return to the **Request for Change** dialog or the **Change Management** tab.

Viewing and Printing Change Management Reports

You can view and print the following Change Management Reports:

- All Open Requests for Change
- Approved, Cancelled, and Rejected Requests for Change (RFCs are canceled if the associated Work Order is closed or canceled)
- Request for Change Activity History
- Request for Change by Week
- Request for Change by Month

To View Change Management Reports:

1. Select the **Reports** module from the **Navigation** pane.
2. Select **Change Management** from the **Reports by Module** drop-down list above the Reports grid.
3. Double click the report you want to view.

See Also: Reports Overview

Printing Requests for Change

You can print a Request for Change, which displays as a detailed report, including the following information:

- Current Date and Time
- Summary
- Policy Name
- Policy Type
- Created Date
- Decision Due Date
- Decision Completed Date
- Change Request Status
- Work Order Number
- Requestor
- Assigned Technician
- Priority
- Work Order Status
- Approvers
- Review History (All Approvers' and Technician's comments, including rejection reasons. The report also displays details when a Technician changes an Approver).

BMC Track-It! Administrators can customize the Change Request report. See Customizing Reports in the Administrator's guide.

To Print Change Requests:

1. From the **Change Request** module, select the Change Request, then select **Print Request for Change** from the **Tasks** pane, **OR**
   Right click and select **Print**, **OR**
   Click the **Print** icon on the toolbar.

BMC Track-It! 11 Web

BMC Track-It! Web Overview

BMC Track-It! Web enables Technicians to access BMC Track-It! via the Web so that you can troubleshoot and solve IT issues while not at your desk. When you're back at your desk, you can manage any of the Work Orders, Inventory, and Solutions you created or edited in BMC Track-It! Web from the BMC Track-It! Technician Client.

The following modules are available in BMC Track-It! Web:

- **Help Desk**
- **Solutions**
- **Inventory**
- **Purchasing**
- **Library**
- **Change Management**

Note: Online help is available once you log in to BMC Track-It! Web (and is separate from the BMC Track-It! Technician Client online help). The topics in the online help are also available in the BMC Track-It! Web Technician's Guide (PDF) on the Product Documentation section of our Support Web page

To Access BMC Track-It! Web:

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

   The **BMC Track-It! Web** home page displays.

BMC Track-It! 11 Mobile Web

BMC Track-It! Mobile Web Overview

BMC Track-It! Mobile Web enables you to access BMC Track-It! via mobile devices such as Android and iPhone smartphones. You can troubleshoot and solve IT issues while not at your desk. When you're back, you can manage any of the Work Orders you created or edited in BMC Track-It! Mobile Web from the BMC Track-It! Technician Client or BMC Track-It! Web.

Technicians can perform the following tasks in the Help Desk and Solutions modules from their mobile devices:

Home Screen

View Announcements

Help Desk

- View work orders
- Search for work orders by keyword and work order number
- Create work orders
- Edit work orders (including quick edits using preset fields
- Copy work orders
- Delete work orders
- Manage work order assignments
- View work order attachments
- View change management information
- Email conversation management (messages and responses are captured in the Work Order)

Solutions

- View Solutions

Inventory

- Create, modify, copy, and delete assets
- Audit assets
- Retire assets
- Email the requestor associated with an asset

Online help is available once you log in to BMC Track-It! Mobile Web on your mobile device. The topics in the mobile WebHelp are also available in the BMC Track-It! Mobile Web Technician's Guide (PDF) on the Product Documentation section of our Support Web page
A video tutorial of BMC Track-It! Mobile Web is available from the mobile Webhelp, and on our Web site.

To Access BMC Track-It! Mobile Web:

1. On your mobile device, go to the URL provided by your BMC Track-It! Administrator (typically `http://servername/TrackItWeb/` where "servername" is the name of the server).
2. Enter your user name and password, then tap the **Login** button.

   The **Work Order lists** display.

Note: If you would prefer to use the BMC Track-It! Web application from your mobile device, click the **View Full Site** link on the BMC Track-It! Mobile Web login screen.

See Also: Video Tutorial

Using BMC Track-It! Mobile Web (Video Tutorial)

This video tutorial will show you how to use BMC Track-It! Mobile Web.

iPhone/iPad (Quicktime .mov)

Android (.swf)

BMC Track-It! 11 Self Service

BMC Track-It Self Service Overview

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

Users can also search for internal BMC Track-It! Solutions.

Users can audit their computers and change their passwords.

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

Note: Online help is available once users 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

See Also: BMC Track-It! Installation Guides, Configuring Self Service, and Change Management Overview

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