BMC Track-It! Web

Technician's Guide

Version 11

BUSINESS RUNS ON I.T.
I.T. RUNS ON BMC™

www.bmc.com

Legal Notices

Restricted rights legend

Numara Software, Inc.
2202 North West Shore Blvd. Suite 650
Tampa, FL 33607 USA
800 557 3031
Customer Support: 800 836 2326 (United States and Canada) or contact your local support center.

Table of Contents

BMC Track-It! 11 Web Overview

BMC Track-It! Web enables you 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 at http://support.numarasoftware.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 Help Desk** module displays.

Getting Help and Support

Viewing Your BMC Track-It! Web Version and System Information

Select **About** from any module's drop-down on the **BMC Track-It! Web** toolbar.

The **About BMC Track-It! Web** dialog displays the following information:

- BMC Track-It! Web version, e.g., BMC Track-It! 11
- Current login (user name)
- Serial Number
- License Information
    - Your company name
    - License expiration date
    - Technician licenses (number of named/concurrent)
- BMC Track-It! Web version (build number)
- Client browser (your Web browser and version)
- Client IP Address
- Web Server
- Web Server IP Address
- Database
- Database Version

User Assistance - BMC Track-It! Web (Online Help and Printed 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! Web Technician's Guide
- BMC Track-It! Web Installation Guide

To Use BMC Track-It! Web's Online Help:

1. Click the **Help** button on the BMC Track-It! Web toolbar or on the module page's toolbar.
   The **Help** page displays in your browser and displays the help topic for the specific BMC Track-It! Web module.
2. To view all of the online help topics, click the **Table of Contents** link on the help topic.
3. To search by keyword, click the **Search** button. Enter your search terms in the **Search** text box, then press the **Enter** key.
   Results display in the left pane.

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 Support Web Page (BMC Track-It! Web)

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.

BMC Track-It! Community (Track-It! Web)

You can access the BMC Track-It! Community from the Track-It! Web main menu. The community is comprised of Track-It! users, administrators, consultants, etc., to interact and share information about real world Help Desk and IT asset management issues.

To access the BMC Track-It! Community:

1. From the **BMC Track-It! Web** main menu, select **Track-It! Community**.
2. The Web page opens in your browser.

Customizing the BMC Track-It! Web Workspace

Viewing Information in Grids (BMC Track-It! Web)

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 views (pre-defined filters), and by sorting, grouping, and filtering the grids.

Note: BMC Track-It! will automatically refresh the grid to display current records. However, you can manually refresh the grid by clicking the **Refresh** button at the bottom of the window.

Views

BMC Track-It! provides several views, for example, in the Inventory module: All Assets, All Computers, All Audited Assets, and All Network Assets.

Note: Although the BMC Track-It! Technician Client allows you to save custom views, this does not apply to BMC Track-It! Web. Views can still be customized by adding, removing, and reordering columns; and by sorting, grouping and filtering data. Those customizations will persist for the next login. You can revert back to the original view at any time by abandoning changes to the view.

To View Records Using Views:

1. Select a view from the **Views** menu on the module's page toolbar (such as All Assets in the Inventory grid).
   The current view is indicated by a bullet icon in the drop-down list.

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. Select **Bottom** or **Right** from the **Preview Pane** menu on the module's page toolbar.
2. Select **Hide** to hide the preview pane.

Viewing, Showing, and Hiding Columns

To View Columns:

1. Drag the horizontal scroll bar to view all the columns.
2. To adjust the width of a column, drag the edge of the column heading to the left or right.

To Show and Hide Columns

1. Point to a column header, then select **Columns** from the drop-down list.
2. Click the check boxes (such as Date Completed) to display or hide the columns.
3. To move the columns, select the column header, then drag and drop it to the left or right.

   Note: The columns will remain shown or hidden, unless you select **Abandon Change to Current View** from the Views menu. (Views in BMC Track-It! Web cannot be saved as they can in the BMC Track-It! Technician Client.)

Searching for Records

To Search for Records in a Grid:

1. Enter the search term in the Search field on the BMC Track-It! Web toolbar, e.g. **Search Work Orders**, **Solutions**, or **Asset**), then click the **Search** button.
   A Search Results tab opens with the results.

Viewing Record Details

To View Record Details:

1. Select the record in the **Results** grid, then click the **Open** button (Help Desk module only).
   For the Inventory and Solution modules, the Preview Pane displays the record.

Next topic: Sorting, Filtering, and Grouping Records (BMC Track-It! Web)

Sorting, Filtering, and Grouping Records (BMC Track-It! Web)

Note: Although the BMC Track-It! Technician Client allows you to save custom views, this does not apply to BMC Track-It! Web. Views can still be customized by adding, removing, and reordering columns; and by sorting, grouping and filtering data. Those customizations will persist for the next login. You can revert back to the original view at any time by abandoning changes to the view.

Sorting Records

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

1. Select a module, e.g., **Help Desk**, from the **BMC Track-It! Web** toolbar.
2. Click the column header (the name at the top of the column) to sort by ascending or descending order.

   You can also Sort Ascending or Sort Descending from the drop-down list on the column header.

Filtering Records

After you've selected a grid view from the **Views** menu, you can filter records based on your criteria to view 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. You can filter by multiple columns. For example, to see computers in a certain location and department, you would filter the Type, Location, and Department columns in the Inventory module.
To Filter Records:

1. Select the drop-down in the column header, e.g., Requestor in the Help Desk grid or User Name in the Inventory grid.
2. Point to **Filters**, and enter the filter criteria, e.g. "Mike", then press the **Enter** key.

   All records with the Requestor's or User's first name "Mike" display.
   The column header displays in ***bold italics*** when the column is filtered.
   - You can enter the first character, which will display all first names beginning with "M".
   - You can also enter the percent symbol (%), which is the wild card character, followed by any of the letters in the name. For example, enter %da for Daniels, or %man for Coleman.

3. To filter on multiple columns, repeat step 2.
   For example, filter the Summary column using "%phone" (the percent sign is a wildcard symbol) to display records where Mike is the Requestor and "phone" is in the Summary.

To Remove a Filter:

1. Select **Abandon Changes to Current View** from the **View** drop-down list.
   This returns the grid to the last view. This will also remove any column settings you have made, such as showing or hiding certain columns.

2. To remove the filter, point to **Filters**, and click the check mark to remove it.

Grouping Records

You can group records in a grid by column. By default, the inventory module displays records already grouped by Type.

To Group Records:

1. Select the drop-down on the column header, e.g., Priority in the Help Desk module, then **Select Group By This Field**.
   The records display grouped by the column name.
2. Click the **Expand** (+) button next to the column name, e.g., Priority, to expand the list. Click the **Collapse** (-) button to collapse the list.

To Remove Groups:

1. Select **Abandon Changes to Current View** from the **View** drop-down list.
   This returns the grid to the original view.
2. To remove the groups, select the drop-down in any Column header, then click the **Show in Groups** check box to remove the checkmark.

Help Desk: Managing Your Work Orders

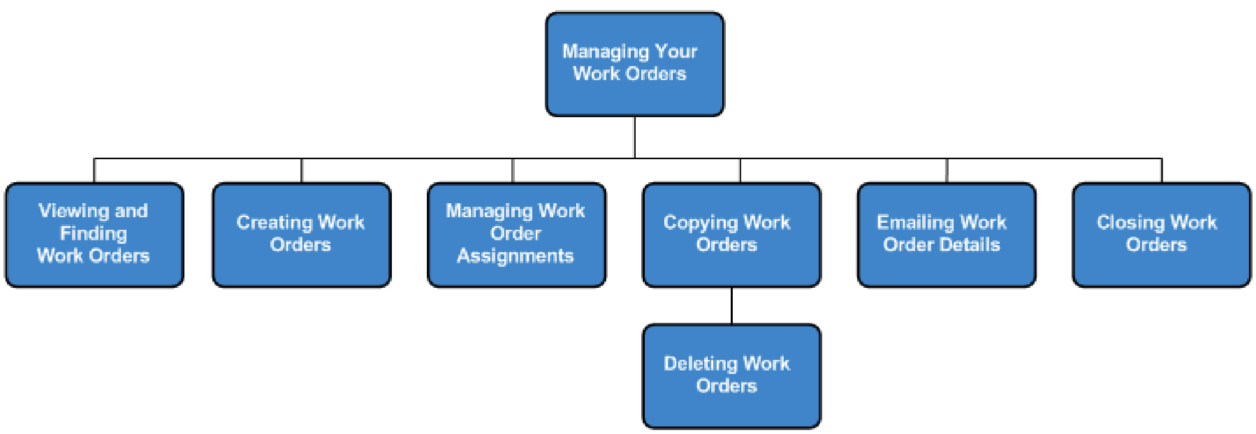
Managing Work Orders Overview (BMC Track-It! Web)

The BMC Track-It! Web Help Desk module enables you to perform the following tasks with Work Orders:

- View and Find Work Orders
- Create Work Orders
- Manage Work Order Assignments
- Copy and Delete Work Orders
- Email Work Order Details to Requestors and Technicians
- Print Work Orders
- Close Work Orders

Managing Work Orders Workflow (BMC Track-It! Web)

The flowchart below represents the tasks in the following topics.



Viewing Announcements (BMC Track-It! Web)

You can view announcements created by your BMC Track-It! administrator.
To View Announcements:
Click the **Announcements** button on the **BMC Track-It! Web** toolbar.

The Announcements open on a new tab.

Customizing the Work Order's Tab Displays (BMC Track-It! Web)

When you open a Work Order record, by default, certain tabs display, such as General Information and Notes. Two panes display at a time (on the left and the right). You can customize how much information displays at a time by collapsing, expanding, and rearranging panels.

The left pane contains the following panels, which you can collapse, expand, and rearrange:

- General Information
- Classification and Schedule
- Billing Information
- Notes
- Applicable Policies
- Custom Fields
- Additional Custom Fields

The right pane contains the following tabs with additional information about the Work Order:

- Notes
- Requestor
- Asset
- Assignments
- Attachments
- Audit Trail
- Change Management

You can collapse and expand the panels, but the tabs cannot be rearranged.
To Customize the Tab Display:

1. Select **Help Desk** from the **BMC Track-It! Web** toolbar.
2. Click the Work Order ID link to open a Work Order.
3. To collapse and expand panels, click the **Expand/Collapse** buttons at the top right of each panel.
4. To rearrange panels on the left pane, point to the panel header (such as General Information) until you see the crosshairs, then drag and drop the panel to the desired location on the pane.

   The new tab layout will persist when the window is reopened.

   See also: Viewing Information in Grids (BMC Track-It! Web).

Viewing and Finding Work Orders

Viewing and Finding Work Orders (BMC Track-It! Web)

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 (BMC Track-It! Web). You can open and work on multiple Work Orders at a time, which open on separate tabs.

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 show the **RFC Status** column:

1. Select the drop-down list from any column header, then select **Columns**.
2. Click the check box next to **RFC Status**.

For more information, see Viewing, Showing, and Hiding Columns in Viewing Information in Grids (Track-It! Web).

- **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. Select **Help Desk** from the **BMC Track-It! Web** toolbar.

   By default, Open Work Orders display in the grid, and the Preview Pane displays the Description and Resolution (if resolved). The number of records displays at the bottom of the grid.

   Notes:

   - You can specify which columns display (See Viewing, Showing, and Hiding Columns in Viewing Information in Grids (BMC Track-It! Web).

2. To view more filtered lists, e.g., My Open Work Orders, My Overdue Work Orders, etc., select a view from the **View** menu on the **Menu Bar**.

3. To open the Work Order record to view details:
   a. Click the Work Order ID link, or
   b. Click the Expand button (+) in the first column of the grid, then click Open.

   The Work Order record opens on a new tab (you can open multiple records at a time, which display on separate tabs). By default, the following panes display:

   - General Information
   - Classification and Schedule
   - Billing Information
   - Notes
     Click **Expand All** to view all of the text in the Notes, and **Collapse All** to view the first few lines. You can also click **More...** to view all of the text in a Note.
   - Applicable Policies
   - Custom Fields
   - Additional Custom Fields

4. To view all of the tabs, click the left and right arrow buttons at the top left and right of the tabs (these buttons display if there are more tabs than can fit on the pane).

To customize the tabs display, see Customizing the Work Order's Tab Displays (BMC Track-It! Web).

To Find Work Orders by ID or Keyword:

1. From the Work Order grid view, enter the work order number in the **Enter Work Order ID** field on the Help Desk **Menu Bar**, then press the **Enter** key or click the **Search** button.

   The Work Order record displays.

2. Enter the keyword in the **Search Work Orders** field on the main menu, then press the **Enter** key or click the **Search** button.

The Work Order(s) display on the **Search Results** tab.

3. Click the Work Order ID link to open the Work Order record.

Viewing a Work Order's Requestor Information and History (Track-It! Web)

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 Sorting, Filtering, and Grouping Records (Track-It! Web).

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:

Select the **Requestor** tab of the **Work Order** window.
The User Information panels displays the information listed above.

Work Order History

Work Orders associated with the requestor display on the Work Order History grid. The grid can be customized (see Sorting, Filtering, and Grouping Records [Track-It! Web]).

To View the Work Orders in the Work Order History Grid:

To view work order details, click the Work Order ID in the grid.
The Work Order opens on a new tab.

Next topic: Selecting and Searching for the Requestor's Asset on a Work Order (Track-It! Web)

Viewing a Work Order's Asset Information and History (BMC Track-It! Web)

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 Sorting, Filtering, and Grouping Records (BMC Track-It! Web).

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:
Select the **Asset** tab of the **Work Order** window.
The Asset Information panel displays the information listed above.

Work Order History

Work Orders associated with the asset display on the Work Order History grid. The grid can be customized (see Sorting, Filtering, and Grouping Records [BMC Track-It! Web]).

To View the Work Orders in the Work Order History Grid:
To view work order details, click the Work Order ID in the grid.
The Work Order opens on a new tab.

Next topic: Prioritizing the Work Order (BMC Track-It! Web)

Viewing Requests for Change (Technicians) BMC Track-It! Web

You can view Change Management details for Work Orders associated with a Request for Change in the Help Desk module. Details include the Approver's name and comments, and status, such as Approved. (RFCs are part of the Change Management process managed in the Change Management module of the BMC Track-It! Technician Client.) In the Help Desk grid, Work Orders that are associated with a Request for Change 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.

To show the **RFC Status** column:

1. Select the drop-down list from any column header, then select **Columns**.
2. Click the check box next to **RFC Status**.

For more information, see Viewing, Showing, and Hiding Columns in Viewing Information in Grids (Track-It! Web).

See also: Change Management Overview
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.
   You can also click the **Click Here to Open Request for Change Details** button next to the **ID** field on the **General Information** section.

Viewing the Work Order Audit Trail (BMC Track-It! Web)

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.
To View a Work Order's Audit Trail:

1. Click the **Audit Trail** tab of the **Work Order** detail window.
   Activities display in reverse chronological order.
2. Click **Expand All** to view details, and **Collapse All** to view only the date, time, and user name.

   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).

Creating Work Orders

Creating Work Orders (BMC Track-It! Web)

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:

- Summary of the issue or request
- Requestor's call back number information (if not automatically displayed)
- Requestor's asset (selected from a list of assigned assets)
- Classification and prioritization of the issue
- Detailed descriptions and notes
- File attachments (supporting documents)

Note: Some Work Orders will enter the Change Management system based on matching criteria, such as Work Order Type. For more information, see Change Management Overview.

If the Requestor's name is used as one of the criteria on a Change Management Policy, a message will display when you attempt to save the Work Order that it will be entered into the Change Management system.
To Create a Work Order:
Click **New Work Order** on the **Help Desk** module toolbar.
A new tab displays the Work Order.

Next topic: Summarizing the Work Order Issue or Request (BMC Track-It! Web)

Summarizing the Work Order Issue or Request (BMC Track-It! Web)

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 emails from Outlook". When searching Work Orders at a later time, you can search for "email", "Outlook", "send", etc.

To Summarize the Issue or Request:
In the **Summary** field on the **General Information** section, enter a brief description of the issue or request.

Next topic: Selecting and Searching for the Requestor's Name on a Work Order (BMC Track-It! Web)

Selecting and Searching for the Requestor's Name and Call Back Number on a Work Order (BMC Track-It! Web)

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 select a Requestor from the drop-down list.
To Select the Requestor's Name:
By default, the Requestor's names display in alphabetical order by first name.

1. In the **Requestor** field, enter the first few letters of the requestor's first 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.

    Note: If the Requestor's name is used as one of the criteria on a Change Management Policy, a message will display when you attempt to save the Work Order that it will be entered into the Change Management system.

To Search for the Requestor's Name:
1. To search by first or last name, enter the percent symbol (%), which is the wild card character, followed by any of the letters in the name in the Requestor field. (For example, enter %da for Daniels, or %man for Coleman.
2. Select the name.

To Select or Enter the Requestor's Call Back Number:

1. Select the telephone number from the **Call Back Number** drop-down list.
   Telephone Numbers are set up in the BMC Track-It! Technician Client, and will display by default.
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.

Next topic: Viewing a Work Order's Requestor Information and History (BMC Track-It! Web)

Selecting and Searching for the Requestor's Asset on a Work Order (BMC Track-It! Web)

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).
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. To search for any part of the Asset name, enter the percent symbol (%), which is the wild card character, followed by any of the letters in the Asset in the Asset field. (For example, enter %mx for TRACKITMXL525011L.)
2. Select the Asset name.

Next topic: Viewing a Work Order's Asset Information and History (BMC Track-It! Web)

Prioritizing the Work Order (BMC Track-It! Web)

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 General Information section of the **Help Desk** module.
   Note: If Priority is used as one of the criteria on a Change Management Policy, a message will display when you attempt to save the Work Order that it will be entered into the Change Management system.

Next topic: Classifying the Work Order Issue (BMC Track-It! Web)

Classifying the Work Order Issue (BMC Track-It! Web)

After you have entered a Summary of the issue, the Requestor's name, Call Back Number, Asset, and Priority, 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 automatically assign specific technicians to certain types of Work Orders). (See Viewing a Work Order's Policies (BMC Track-It! Web) and Setting up Skill Routing Policies in the Administrator's Guide.)

To Classify the Issue:

Note: If the Type, Subtype, or Category are used as criteria on a Change Management Policy, a message will display when you attempt to save the Work Order that it will be entered into the Change Management system.

1. Select the **Classification and Schedule** section 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.

Assigning Technicians to a Work Order (BMC Track-It! Web)

If your Administrator has given you the necessary permissions, you can assign or re-assign a Technician to Work Order.

See Viewing a Work Order's Policies (BMC Track-It! Web) and Setting up Skill Routing Policies in the Administrator's Guide.

To Assign a Technician to a Work Order:

1. On the **Classification and Schedule** section on the **Work Order**, select a Technician from the **Assigned Technician** drop-down list.
3. Click the **Save** button.

To Change Technicians in a Work Order:

1. Select a different Technician from the **Assigned Technician** drop-down list.
2. Click the **Save** button.

Next topic: Viewing a Work Order's Policies (BMC Track-It! Web)

Viewing a Work Order's Policies (BMC Track-It! Web)

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. (See Setting up Skill Routing Policies in the Administrator's Guide.)

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 on the **Applicable Policies** section). (The **Due Date** is the date and time a work order with the criteria set up on a Work Order Event Policy is due from the moment the Work Order is created.) You cannot edit the Due Date, but you can edit the **Expected Completion Date** on the Classification and Schedule section. (The **Expected Completion Date** is the date and time a work order with the criteria set up on a Work Order Event Policy is expected to be completed from the moment the Work Order is created.)

To View a Work Order's Policies
Open the Work Order, and scroll down to the Applicable Policies section.

If a Skill Routing policy is in place, the name of the policy and the designated Technician will display.
If an Event Policy (SLA) is in place, the name of the policy and the Due Date and Time will display.

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

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

Next topic: Scheduling Work Order Due Dates and Times (BMC Track-It! Web)

Scheduling Work Order Due Dates and Times (BMC Track-It! Web)

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 on the **Applicable Policies** section). (The **Due Date** is the date and time a work order with the criteria set up on a Work Order Event Policy is due from the moment the Work Order is created.) You cannot edit the Due Date, but you can edit the **Expected Completion Date** on the **Classification and Schedule** section. (The **Expected Completion Date** is the date and time a work order with the criteria set up on a Work Order Event Policy is expected to be completed from the moment the Work Order is created.)
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. On the **Classification and Schedule** section, click the **Calendar** icon under **Expected Completion Date** 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. Select a time from the Time drop-down list.
   If a time is not selected, it will default to the current time when the Work Order is saved, but can be changed.
4. Click the **Save** button.

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

Entering Custom Work Order Details (Custom Fields) BMC Track-It! Web

Your BMC Track-It! Administrator can set up custom fields for Work Orders specific to your organization. These fields display on the **Custom Fields** and **Additional Custom Fields** sections in a Work Order. By default, on the Custom Fields section, the fields are labeled Lookup 1 through 6, Text 1 and 2, and Date 1 and 2. On the Additional Custom Fields section, the fields are labeled Lookup 7 and 8, Date 3 and 4, Text 3 through 6, Numeric 1 and Integer. Your Administrator can change the labels so they display according to your organization's specifications.
To Enter Custom Work Order Details:

1. On the **Custom Fields** or **Additional Custom Fields** sections on the **Work Order** window, select or enter the custom work order details in the **Custom Fields** section.
2. Click the **Save** button.

Next topic: Attaching Files to Work Orders (BMC Track-It! Web)

Adding Descriptions and Technician Notes to Work Orders (BMC Track-It! Web)

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

Notes are also created from e-mails to and from 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.
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.
   The note displays 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.
2. On the **Edit Note** dialog, 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.

To Delete a Description or Note:

1. Click the **Delete** button on the note you want to delete in the Notes panel.
2. Click **Yes** on the **Delete Confirmation** message.

3. Click **Yes** on the confirmation dialog to delete the note or **No** to cancel the deletion.

Attaching Files to Work Orders (BMC Track-It! Web)

You can add files to Work Orders, such as text files, documents, or images.
To View Work Order Attachments:

1. On the **Attachments** tab of the Work Order, click the file name link, e.g., filename.txt.

Tip: You can customize the grid view and add the **# of Attachments** column to quickly view which records have attachments (including the number of attachments). See Viewing, Showing and Hiding Columns in Viewing Information in Grids (BMC Track-It! Web).
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 **Add Attachment** dialog, navigate to the location of the file, then click the **OK** button. The file displays on the **Attachments** tab on the **Work Order** window.
4. Click the **Save** button.

To Delete a File Attachment from a Work Order:

1. Select the file on the **Attachments** tab, then press the **Delete** button. 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").

Sending Messages to Technicians and Requestors from Work Orders

E-mailing Work Order Details to Requestors and Technicians (BMC Track-It! Web)

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:

- 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, select the **Work Order** that you want to e-mail.
2. Click the **Send E-mail Message to Requestor** or **Send E-mail Message to Technician** button the toolbar.
3. Alternatively, from the **Work Order** detail window, click the **Send E-mail Message to Requestor** or **Send E-mail Message to Technician** button the toolbar.

4. 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.
   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.
5. **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 (BMC Track-It! Web)

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).

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, select the **Work Order** that you want to e-mail.
2. Click the **Send Text Message to Technician** button the toolbar.
3. Alternatively, from the **Work Order** detail window, click the **Send Text Message to Technician** button the toolbar.

1. 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.
   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. The Work Order's Attachments are included in the message by default. To exclude the them, click to deselect the **Include attachments...** checkbox.
   e. 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.

Managing Work Order Assignments

Adding Assignments to Work Orders (BMC Track-It! Web)

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. Assignments are indicated by a pink icon next to the ID number. Work Orders with Assignments are indicated by a green and pink icon.

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 Assigning Work Orders (Converting Work Orders to Assignments) BMC Track-It! Web

You can also promote an Assignment to a Work Order, which disassociates it from the parent Work Order. See Promoting Assignments to Work Orders (BMC Track-It! Web).

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:
You can add an Assignment to a Work Order two ways: from the Create New Assignment on the Work Order grid, or from the Assignments tab in a Work Order.

From the Work Order Grid:

1. Select the Work Order to which you want to add an Assignment, then click the **Create New Assignment** button on the toolbar.
2. Follow the instructions below from #3.

From the Work Order's Assignments Tab:

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 tab displays the Assignment ID number.
   Tip: You can view the Parent work order by clicking the icon next to the **ID** field on the **General Information** section.
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 Viewing, Showing, and Hiding Columns in Viewing Information in Grids (BMC Track-It! Web).

To Delete Assignments from a Work Order:

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

Assigning Work Orders (Converting Work Orders to Assignments) BMC Track-It! Web

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. You can select multiple Work Orders at a time to convert to Assignments.

Notes:

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

To Assign Work Orders:

1. Select the Work Order from the **Work Order** grid of the **Help Desk** module.
    a. To select multiple Work Orders, hold the **Ctrl** key while selecting them. Hold the **Shift** key to select multiple assets in sequential order.
2. Click the **Assign to Work Order** button on the toolbar.
3. On the **Assign to Work Order** dialog, enter the Work Order ID, then click the **OK** button.
4. Click Yes on the **Assign to Work Order** confirmation dialog.
   The Assignments display on the parent Work Order's Assignment tab.

Closing Work Order Assignments (BMC Track-It! Web)

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 (BMC Track-It! Web)

You can promote an 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 the **Promote Assignment** button on the toolbar.
3. Click **Yes** on the **Promote Assignment** confirmation dialog.

   The Assignment is converted to a Work Order, and the Work Order detail window opens. The tab 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. Any hours and charges for parent Work Order will change appropriately.

Copying Work Orders and Assignments (BMC Track-It! Web)

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 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

Note: If a Work Order assigned to a Change Management Policy is copied, the new Work Order will also be assigned to a Change Management Policy.

To Copy a Work Order:

1. Select the Work Order or Assignment on the Work Order grid, then click the **Copy** button on the toolbar.
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 **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. You can edit the copied Work Orders as necessary.

Deleting Work Orders (BMC Track-It! Web)

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. Select the Work Order (or multiple Work Orders) from the Work Order grid, then click the **Delete** icon on the toolbar.
   You can also open the Work Order window, then delete the Work Order by clicking the **Delete** icon.
2. The **Delete Work Order** confirmation dialog displays. Click **OK** to delete the Work Order(s) and any Attachments.

Printing Work Orders (BMC Track-It! Web)

Note: Popup blockers enabled in browsers will prevent a Work Order from printing.
To Print Work Orders:

1. From the **Help Desk** module, select the Work Order in the Help Desk grid, then click the **Print** icon on the toolbar.
2. From an open Work Order, click the **Print** icon on the toolbar.

Closing Work Orders

Closing Work Orders Overview (BMC Track-It! Web)

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).

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).

Documenting Work Order Resolutions (BMC Track-It! Web)

While the Work Order Description and Technician Notes are typically used to describe an issue, Resolution notes enable you to describe exactly how you solved the problem. This information may help you and other technicians in similar situations.

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. On the **Notes** tab of the Work Order, select **Resolution** from the **Type** drop-down list.
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.
   The note will display in the **Notes** section (indicated by a check mark icon) in descending chronological order.
4. Click the **Save** button.

To Edit Resolution Notes:

1. Select Resolution, then click the **Edit** icon.
2. You can change the **Resolution 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.

To Delete a Resolution Note:

1. Click the **Delete** button on the note you want to delete in the **Notes** section**.**
2. Click **Yes** on the confirmation dialog to delete the note or **No** to cancel the deletion.

Entering Work Order Billing Information (Hours and Charges) BMC Track-It! Web

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 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:

1. Open the Work Order if it has no Assignments, or the Assignment if it has a parent Work Order.
2. On the **Billing Information** section, 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. Select the Location to bill from the **Location** drop-down list.
5. Select the Department to bill from the **Department** drop-down list.
   The **Department Number** displays depending on the Department, as set up by the Administrator.
6. Click the **Save** button.

Closing Work Orders (BMC Track-It! Web)

Note: All Work Order Assignments must be closed before the parent Work Order can be closed.

You can close a Work Order from the Change Status to "Closed" button on the Work Order toolbar, or from the Status drop-down list on 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:

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 and the Work Order is saved, the **Date Completed** field on the **Classification and Schedule** section automatically displays the current date and time, but can be changed.

3. 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.
4. To categorize the note, select the code from the **Activity Code** drop-down.
5. 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)
6. When you are finished, click the **OK** button.

   The note displays on the Work Order's **Notes** tab.
7. 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.

Reopening Closed Work Orders (BMC Track-It! Web)

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 when the Work Order is saved.

2. 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.
3. To categorize the note, select the code from the **Activity Code** drop-down.
4. 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)
5. When you are finished, click the **OK** button.

   The note displays on the Work Order's **Notes** tab.
6. 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.

Solutions: Managing Solutions

Managing Solutions (Overview) BMC Track-It! Web

The **Solutions** module enables Technicians to maintain a database of Solutions to common work order issues. Technicians can make Solutions public so that end users with access to BMC Track-It! Self Service Web can view them.

With the Solutions module, Technicians can:

- View solutions
- Search for solutions
- Create solutions and topics
  - in the Solutions module
  - from Work Order resolutions
- Attach files to solutions
- Make solutions public or private (for end users or Technicians)
- Edit and delete solutions and topics
- Create work order resolutions from solutions
- Print solutions

Viewing Solutions (BMC Track-It! Web)

The **Solutions** module enables Technicians to maintain a database of solutions to common work order issues. 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 topics beneath the Root topic, e.g., topics called Hardware, Software, Network, etc. Within each of these topics, you can create sub-topics, e.g., within the Hardware topic you can create sub-topics called PCs, Printers, and Routers. You can create as many levels of subtopics as needed. Then you can add solutions for the topics and sub-topics.
To View Solutions:

1. Select the **Solutions** module from the **BMC Track-It! Web** menu.
2. Click the **Expand** icon next to a topic (book icon) to view solutions for that section.
   You can also double click the topic icons to expand and collapse them.
3. Click the **Page** icon to view a preview of the Solution.

   A preview of the Solution displays on the right pane.
4. Double click the **Page** icon to open the Solution.
   The General Information section displays the following:
   - Solution ID
   - Parent Topic
   - Summary
   - Details
   - The Attachment tab

To View a Solution's Attachments:

1. Click the **Attachments** tab.
   The Attachments tab displays the number of attachments for the Solution, e.g. "Attachments (1)". The following information is displayed for attachments:
   - Name
   - Size
   - Date Modified
   - Modified by
   - Date Created
   - Created by
2. To view the attachment, click the **attachment name** link, e.g. "image.jpg". Follow the instructions for your particular browser to open or save the file.

Searching for Solutions (BMC Track-It! Web)

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. Select **Solutions** from the **BMC Track-It! Web** toolbar.
2. Enter the search term in the **Search Solutions** field on the **Solutions** menu bar.
   You can also search for Solutions from any module. Select the module from the **Search** drop-down list on the main menu bar.
   The list of Solutions displays on the **Search Results** tab.
3. Select a Solution.
   The Solution displays on the right pane.

Creating Solutions Topics and Sub-topics (BMC Track-It! Web)

You can create Topics and Sub-topics so that solutions can be categorized. A topic is like a category, which is represented by a "book" icon in the Solutions list.. For example, you might want to create a topic called "Hardware" to contain solutions for hardware issues, such as those pertaining to PCs, keyboards, monitors, etc. You can create sub-topics within topics. For example, you might create a Microsoft Office topic to contain sub-topics on Microsoft Word, Microsoft Excel, etc.

Note: Topics and Sub-topics can be reorganized in BMC Track-It! Technician Client. See Organizing Topics and Solutions in the Adding and Maintaining Work Order Solutions topic in the online help for BMC Track-It! Technician Client.
To Create Topics for Solutions:

1. Select **Solutions** from the **BMC Track-It! Web** toolbar.
   Select the **Root** topic from the **Solutions** list, then select **New Topic** from the **New Solution** button drop-down on the **Solutions** toolbar.
2. On the **Topic Detail** dialog, leave the **Parent Topic** blank (this will ensure that the new topic is directly under the Root topic) .
3. Enter a name for the new topic in the **Topic Name** field of the **Topic Detail** dialog.
4. Click the **Save** button.

To Create Sub-topics (Books)

1. To create a sub-topic, select the **Parent** topic from the **Solutions** list, then select **New Topic** from the **New Solution** button drop-down on the **Solutions** toolbar.
   The Parent topic displays on the **Topic Detail** dialog.
2. To select a different Parent Topic, click the **Parent Topic** drop-down, then select the Parent topic from the **Choose Parent Topic** dialog, and click the **OK** button.
3. Enter a name for the new topic in the **Topic Name** field of the **Topic Detail** dialog.
4. Click the **Save** button.

Creating Solutions and Making Them Private or Public (BMC Track-It! Web)

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 Create Solutions (Pages)

1. Select a **Topic** (book icon) from the **Solutions** list, then select **New Solution** from the **New Solution** button drop-down.
2. To make the solution private so that it can only be viewed by Technicians, click the **Private** checkbox.
   You can uncheck the **Private** checkbox if you decide to make the solution public later.
3. In the **General Information** section of the **New Solution** tab, enter a description for the solution in the **Summary** text box.
4. Enter a detailed description for the solution in the **Details** text box.
5. If necessary, you can select a different Parent Topic, from the **Parent Topic** drop-down.
6. Click the **Save** button.

The solution displays on Solutions list in the topic you selected. Private solutions are indicated by a page icon with a red circle-backslash symbol.

See also: Editing Solutions (BMC Track-It! Web), Creating Solutions from Work Order Resolutions (BMC Track-It! Web) and Creating Work Order Resolutions from Solutions (BMC Track-It! Web)

Editing Solutions and Topic Names (BMC Track-It! Web)

To Edit a Topic Name:

1. Select **Solutions** from the **BMC Track-It! Web** toolbar.
2. Select the **Topic**, then click the **Open** button.
3. In the **Topic Detai**l dialog, change the text in the **Topic Name** field, then click the **Save** button.

To Edit a Solution:

1. Double click the Solution within a Topic to open it.
2. In the **General Information** section of the **Solution** tab, edit the summary of the solution in the **Summary** text box.
3. Edit the details of the solution in the **Details** text box.
4. If necessary, you can select a different Parent Topic, from the **Parent Topic** drop-down.

To Edit the Solution's State (Public or Private)

1. To edit an individual Solution, select the Solution, then select Private or Public from the **Set Solution State** drop-down list on the **Solutions** toolbar.
   Private solutions are indicated by a page icon with a red circle-backslash symbol.

2. To edit all of the Solutions in a Topic, select the Topic, then select Private or Public from the **Set Solution State** drop-down list on the **Solutions** toolbar.
3. Select Yes on the **Set Solution State** confirmation dialog if you want to change the state of every Solution in the Topic.

See also: Attaching Files to Solutions (BMC Track-It! Web)

Attaching Files to Solutions (BMC Track-It! Web)

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

To Attach a File to a Solution:

1. If the Solution is not already open, double click the **Solution** icon (page icon) to open it.
2. On the **Attachments** tab, click the **Add** button.
3. In the **Add Attachment** dialog, click the **Browse** button.
4. On the **Choose File** dialog, navigate to the location of the file, then double click it, or select it and click the **Open** button.
5. Click the **OK** button on the **Add Attachment** dialog.
   The file displays on the **Attachments** tab.
6. Click the **Save** button.

To Delete a File Attachment from a Solution:

1. Select the file on the **Attachments** tab, then click the **Delete** button. Click **Yes** on the **Delete Attachment(s)** confirmation dialog.
2. Click the **Save** button

Organizing Solutions (BMC Track-It! Web)

You can move or reorganize the Solutions in the hierarchy by reassigning the Solution to a different parent Topic.

To Move a Solution:

1. Select **Solutions** from the **BMC Track-It! Web** toolbar.
2. Double click the **Solution** within a **Topic** to open it.
3. Click the **Parent Topic** drop-down and select a different Parent Topic from the **Choose Parent** topic dialog. Then click the **OK** button.
4. Click the **Save** button.

   Note: You cannot move a Solution to the top-level Root topic.

To Move a Topic (Book)

1. Select the Topic (Book), then click the **Open** button on the toolbar.
2. On the **Topic Detail** dialog, click the **Parent Topic** drop-down and select a different Parent Topic from the **Choose Parent** topic dialog.
   (If you want to move the Topic to the top-level Root topic, select the **Root** topic.)
3. Click the **OK** button, then click the **Save** button on the **Topic Detail** dialog.

Deleting Solutions and Topics (BMC Track-It! Web)

Important Note: Before deleting a Topic, make sure you also want to delete all of the sub-topics and solutions within it.

To Delete a Topic:

1. Select **Solutions** from the **BMC Track-It! Web** toolbar.
2. Select the **Topic** (book icon), then click the **Delete** button.
3. Click Yes on the **Delete Topic** confirmation dialog.
   The Topic and any sub-topics are deleted.

To Delete a Solution:

1. Select the Solution (page icon), then click the **Delete** button..
2. Click the **Yes** button on the Confirmation dialog to delete the Solution.

Creating Solutions from Work Order Resolutions (BMC Track-It! Web)

If you have resolved a common Work Order issue, you can add its resolution to the Solutions module.

To Create a Solution from a Work Order:

1. Select **Help Desk** from the **BMC Track-It! Web** toolbar.
2. In the **Help Desk** grid, click the **Work Order** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
3. On the **Notes** tab of the Work Order, click the **Make Solution** button (lightbulb icon) on the Resolution (indicated by a check mark).
4. On the **Choose Parent Topic 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.
   Note: If the desired parent topic does not exist, return to the **Solutions** module and create it first. See Creating Solutions Topics and Sub-topics (BMC Track-It! Web).
5. The **Solution Detail** tab displays with the new solution. Make any edits as necessary, then click the **Save** button.
   The new solution displays under the selected parent topic in the **Solutions** module.

Creating Work Order Resolutions from Solutions (BMC Track-It! Web)

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. Select **Help Desk** from the **BMC Track-It! Web** toolbar.
2. In the **Help Desk** grid, click the **Work Order** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
3. On the **Notes** tab of the Work Order, select **Resolution** from the **Type** drop-down list, then click the **Insert Solution** button.
4. On the **Insert Solution** dialog, enter the search term in the **Search for:** field, then click the **Search** button.
   You can also click the **Search** button without a search term to view all solutions.
   The list of solutions displays.
5. Select a solution to view details in the preview pane.
6. Once you've identified a solution, click the Select button.
   The solution details display in the Notes field of the Work Order's Notes tab.

7. Click the **Add Note** button.

The resolution displays in the Notes section (indicated by a check mark icon).

Printing Solutions to Work Orders (BMC Track-It! Web)

Note: Popup blockers enabled in browsers will prevent a Solution from printing.
To Print Solutions:

1. Select the **Solutions** module from the **BMC Track-It! Web** menu.
2. Select the Solution, then click the **Print** icon on the toolbar.

Inventory: Managing IT Assets

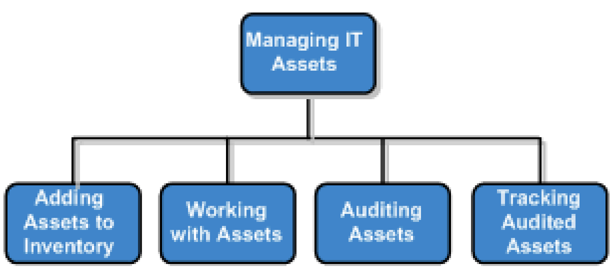
Managing IT Assets Overview (BMC Track-It! Web)

BMC Track-It! Web's Inventory module enables you to perform the following tasks with assets and items:

- **Work with Assets**
  - View and edit assets, attach files, copy, delete, and print assets
- **Work with Items**
  - Store and transfer items to and from the Unassigned Equipment list
  - Associate an asset's software with a software title
  - Promote items to assets
- **Audit Assets**
  - Manually audit assets on demand
  - Include/exclude assets from scheduled audits
  - View audit results for hardware, software, and files
  - Change audited software approval status
- **Track Items**
  - View tracked items for an asset
  - Track an item for an asset
  - Add non-network items
  - Delete tracked items
- **View and Print Reports for Individual Assets**

Managing IT Assets Workflow (BMC Track-It! Web)

The flowchart below represents the tasks in the following topics.



Next Topic

Adding Assets to Inventory (Overview)

Manually Adding Assets (BMC Track-It Web)

Typically, BMC Track-It! Administrators use the Asset Discovery feature to add inventory to BMC Track-It!. In BMC Track-It! Web, you can manually add assets (which might be useful for non-networked assets such as DVD players).

To Manually Add an Asset:

1. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. Click **New Asset** on the **Inventory** toolbar.
3. Select the asset type (such as Computer or Printer) from the **Select Asset Type** dialog, then click the **OK** button.
   The new tab for the asset displays, e.g., "Computer - New".

To Add Asset Details:

The **General Information** section of the **Asset** tab, e.g., "Computer ID/Name" displays the most commonly-used fields to describe an asset: Type, ID, User, Location, Department, and Department Number..

1. The **Asset Type** displays by default in the Type field, as previously selected, but can be changed from the drop-down list.
2. Enter the asset's ID number in the **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. (You can enter the first few letters of the first name until recognized.)
4. Select or enter a location from the **Location** drop-down list.
5. Select or enter the department from the **Department** drop-down list.
6. Select or enter a department number from the **Department Number** drop-down list.
7. To include the asset in scheduled audits, click the checkbox.
8. Click the **Save** button.

Additional information about networked assets is automatically displayed on specific tabs during the audit process, and some fields are user-defined.

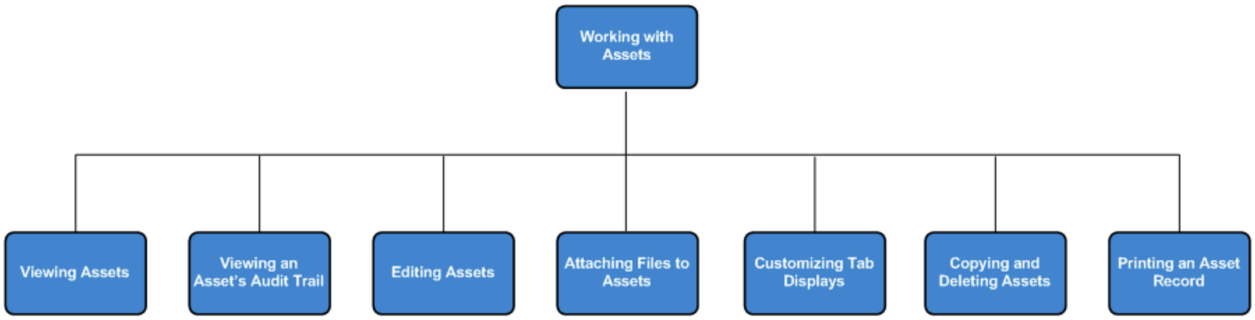
Working with Assets

Working with Assets (Overview) BMC Track-It! Web

Once Assets are added to Inventory (either with Asset Discovery in the BMC Track-It! Technician Client or manually), you can view, edit, attach files, copy, delete, print, and audit them. You can also promote Items to Assets to track them individually.

Working with Assets (Workflow) BMC Track-It! Web

The flowchart below represents the tasks in the following topics.



Viewing Assets (BMC Track-It! Web)

With the BMC Track-It! Web Inventory module, you can view your company's assets, such as computers, printers, and routers.

The list of assets is displayed in the Inventory grid (Inventory module).
To View Asset Information:

1. Select **Inventory** from the **BMC Track-It! Web** toolbar.

   The **Inventory** module displays and assets are listed in the grid, grouped by Type, such as Computers or Printers. You can specify which columns to view (See Viewing, Showing, and Hiding Columns in Viewing Information in Grids (BMC Track-It! Web) The number of records display at the bottom of the grid.

2. To view more filtered lists, e.g., All Computers, select a view from the **View** menu on the **Menu Bar**. (All Assets are displayed by default.)
3. Click on each Asset to view details in the preview pane.
4. To open the Asset record, in the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click Open. The Asset record opens.

   The **General Information** section of the **Asset** tab, e.g., "Computer ID/Name" displays the most commonly-used fields to describe an asset: Type, ID, User, Location, Department, and Department Number. Additional information about the asset is automatically displayed on specific tabs during the audit process, and some are user-defined.

See also: Customizing the Asset's Tab Displays (BMC Track-It! Web)

Viewing an Asset's Audit Trail (BMC Track-It! Web)

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 page. The Audit Trail displays what was changed, at what date and time, and who made the change (an individual or the audit process) for the following attributes:

- Asset ID
- User
- Location
- Department
- Department Number
- User-defined Fields (Custom Text)
- Attachments

To View an Asset's Audit Trail:

1. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**. The Asset record opens.
2. Click the **Audit Trail** tab.
   Activities display in reverse chronological order.
3. To collapse and expand audit information for all of the dates and times:
   a. Click the **Expand All button** to display all of the audit trail details for all dates and times.
   b. Click the **Collapse All button** to collapse the audit trail details.
4. To collapse and expand information for individual dates and times, click the **triangle icon** next to each date/time.

Customizing the Asset's Tab Displays (BMC Track-It! Web)

When you open an Asset record, by default, certain tabs display, such as General Information and Description. Two panes display at a time (on the left and the right). You can customize how much information displays at a time by collapsing, expanding, and rearranging panels.

The left pane contains the following panels, which you can collapse, expand, and rearrange:

- General Information
- User Defined Fields
- Description
- Other Information
- Bar Code Information

The right pane contains the following tabs with additional information about the Asset:

- Tracked Items
- Software
- File Information
- Hardware
- Graphic
- Attachments (and number of attachments)
- Audit Trail

You can collapse and expand the panels, but the tabs cannot be rearranged.

To Customize the Tab Display:

1. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. Click the Asset ID link to open the Asset.
3. To collapse and expand panels, click the **Expand/Collapse** buttons at the top right of each panel.
4. To rearrange panels on the left pane, point to the panel header (such as General Information) until you see the crosshairs, then drag and drop the panel to the desired location on the pane.

The new tab layout will persist when the window is reopened.

See also: Viewing Information in Grids (BMC Track-It! Web).

Editing Assets (BMC Track-It! Web)

It is best to allow the auditing process to automatically update networked assets, such as computers and printers; however, you can manually edit many of the fields in the Asset record.

Fields You Can Manually Edit

- **General Information (General Information tab)**
  - Type (Asset Type)
    - You can change Asset types for an Asset (Computer, Hub, Printer, Router, Switch, or Other). However, if the asset is a Computer, and it has already been audited, you cannot change its system asset type. You can only change a Computer to a Laptop, Storage, or Other.
  - ID
  - User
  - Location
    - BMC Track-It! Administrators can configure the audit process so that when assets are audited, users are prompted to enter their location. However, you can manually change it.
  - Department
    - BMC Track-It! Administrators can configure the audit process so that when assets are audited, users are prompted to enter their department. However, you can manually change it.
  - Department Number
- **User Defined Fields**
  - Custom Text #1 through #6
    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.
- **Description**
- **Other Information**
  - Modem
  - Modem Extension
  - Network
- **Hardware (Hardware tab)**
  - The Hardware tab is designed to display information when a networked asset is audited.
  - You can edit specific hardware attributes in order to provide more details or change information. However, if you edit a hardware attribute, it will not be updated during future audits unless you select to resume updates for the particular attribute). To edit Hardware attributes, see Viewing Hardware Audit Results (BMC Track-It! Web).
- **Graphic (Graphic tab)**

- **Attachments (Attachments tab)**

To Edit an Asset:

1. Select **Inventory** from the **BMC Track-It! Web** toolbar.
   The **Inventory** module displays and Assets are listed in the grid.
2. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
3. Edit any of the fields mentioned above by selecting options from the drop-down lists or entering information in the text fields.
4. Click the **Save** button.

Attaching Files to Assets (BMC Track-It! Web)

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, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click Open. The Asset record opens.
2. Click the **Attachments** tab.
   The Attachments tab displays the number of attachments for the Asset, e.g. "Attachments (1)".
   The following information is displayed for attachments:
   - Name
   - Size
   - Date Modified
   - Modified by
   - Date Created
   - Created by
3. To view the attachment, click the **attachment name** link, e.g. "image.jpg". Follow the instructions for your particular browser to open or save the file.

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 Viewing Information in Grids (BMC Track-It! Web) topic.

To Attach a File to an Asset:

1. On the **Attachments** tab, click the **Add** button.
2. In the **Add Attachment** dialog, click the **Browse** button.
3. On the **Choose File** dialog, navigate to the location of the file, then double click it, or select it and click the **Open** button.
4. Click the **OK** button on the **Add Attachment** dialog.
   The file displays on the **Attachments** tab.
5. Click the **Save** button.

To Delete a File Attachment from an Asset:

1. Select the file on the **Attachments** tab, then click the **Delete** button. Click **Yes** on the **Delete Attachment(s)** confirmation dialog.
2. Click the **Save** button.

Copying and Deleting Assets (BMC Track-It! Web)

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. In the **Inventory** grid, select the **Asset**, then click the **Copy** button on the **Inventory** toolbar.
2. You can also copy the Asset after opening the Asset record: Click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**. Then click the **Copy** button on the **Asset** toolbar.
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 Asset tab opens for the copied Asset, where you can edit the attributes, if necessary. The copied is automatically assigned an Asset ID (a system-generated consecutive number).

Deleting an Asset

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.
- You can also retire assets until you're ready to delete them. See Retiring Assets.

To Delete an Asset:

1. In the **Inventory** grid, select the **Asset**, then click the **Delete** button on the **Inventory** toolbar.
2. You can also delete the Asset after opening the Asset record: Click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**. Then click the **Delete** button on the **Asset** toolbar.
3. On the **Delete Asset** confirmation dialog, if there are Tracked Items associated with the Asset, select one of the radio buttons to **Delete tracked items** or **Transfer tracked items to "Unassigned Equipment"**, then click the **Yes** button.

See also: Tracking Items for an Asset (Overview) BMC Track-It! Web and Storing Items in the Unassigned Equipment List (BMC Track-It! Web)

Printing Asset Records (BMC Track-It! Web)

You can print a report for an Asset (one Asset at a time).

To Print an Asset Record:

1. In the **Inventory** grid, select the **Asset**, then click the **Print** button on the **Inventory** toolbar.
2. The report displays in a new browser window. Right-click the report, and select **Print**.

Working with Items

Working with Items (BMC Track-It! Web)

In BMC Track-It! Web, you can store items in the Unassigned Equipment list, transfer Items to and from the Unassigned Equipment list and other Assets, associate an Asset's software with a software title, and promote Items to Assets.

Storing Items in the Unassigned Equipment List (BMC Track-It! Web)

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. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. Expand the **Type: Storage** list in the **Inventory** grid.
   (If "Storage" does not display, select **All Assets** from the **Views** menu.)
3. Select 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 (BMC Track-It! Web)

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. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. Expand the **Type: Storage** list in the **Inventory** grid.
   (If "Storage" does not display, select **All Assets** from the **Views** menu.)
3. Select the **Unassigned Equipment** asset.

   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 Tracked Items for an Asset (BMC Track-It! Web)).
2. Select **Transfer to Unassigned Equipment** from the **Transfer** button on the **Tracked Items** tab.
3. Select **Transfer to Unassigned Equipment**.
4. Click Yes on the **Transfer Tracked Item** (to Unassigned Equipment) dialog.
5. Click the **Save** button.
   The Item displays on the **Tracked Items** tab of in the **Unassigned Equipment** asset.

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

1. Select the Item in the **Unassigned Equipment** asset (**Tracked Items** tab).
2. Click the **Transfer** button on the **Tracked Items** tab.
   The **Transfer Tracked Item** dialog displays.
3. To locate the Asset that will receive the item, enter a search term in the **Search for** text box (the first four characters of any value) for the following Asset fields. (For example, enter the User's last name that is associated with the Asset).

   - Asset ID
   - Asset Type
   - User Department
   - User Department Number
   - User Location
   - User Name

   Tip: To view all of the Assets, click the **Search** button without entering a search term in the **Search for** text box.

4. Click the **Search** button.
   The search results display the assets with your search criteria.
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 Yes on the **Transfer Tracked Item** (to another asset) confirmation dialog.
7. Click the **Save** button on the **Unassigned Equipment Asset** tab.
   The Item is transferred and displays on the **Tracked Items** tab of the receiving Asset.

Transferring Items Between Assets (BMC Track-It! Web)

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. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. In the **Inventory** grid, click the **Asset ID** link from which you want to transfer the item.
   (To open the Asset, you can also click the **Expand** button (+) in the first column of the grid, then click **Open)**.
3. Select the Item you want to transfer from the Asset's **Tracked Items** list (**Tracked Items** tab).
4. Select **Transfer to Another Asset** from the **Transfer** button on the **Tracked Items** tab.
5. To locate the Asset that will receive the item, enter a search term in the **Search for** text box (the first four characters of any value) for the following Asset fields. (For example, enter the User's last name that is associated with the Asset.)

    - Asset ID
    - Asset Type
    - User Department
    - User Department Number
    - User Location
    - User Name

   Tip: To view all of the Assets, click the **Search** button without entering a search term in the **Search for** text box.

    4. Click the **Search** button.
       The search results display the assets with your search criteria.
    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 Yes on the **Transfer Tracked Item** (to another asset) confirmation dialog.
    7. Click the **Save** button on the **Asset** tab.

       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

Manually Associating an Asset's Software with a Software Title (BMC Track-It! Web)

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. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. In the **Inventory** grid, click the **Asset ID** link that has the software you want to associate with a software title.
   (To open the Asset, you can also click the **Expand** button (+) in the first column of the grid, then click **Open)**.
3. On the **Software** tab of the **Asset** page, select the **Programs** tab or the **Files** tab.
4. Select the program or file, then click the **Associate** button.
   (If the Associate button is disabled, the software has already been associated with a software title.)
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** dialog now displays the associated **Software Title** with the **Program Name**. (To view the **Installed Program** window, double click the software from the **Programs** tab or the **Files** tab on the **Software** tab of the **Asset** window.)

Promoting Items to Assets (BMC Track-It! Web)

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. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. In the **Inventory** grid, click the **Asset ID** link that has the item you want to promote to an Asset.
   You can also promote items to Assets Unassigned Equipment.
   (To open the Asset, you can also click the **Expand** button (+) in the first column of the grid, then click **Open)**.
3. Select the **Tracked Items** tab.
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.
6. You can add details to the new asset on the **Asset** tab 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. Click the **Save** button.
   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 on Demand (BMC Track-It! Web)

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** page. The process also automatically updates the **Tracked Items** list for the computer with basic hardware and software information.

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" at
http://support.numarasoftware.com/support/view_article.asp?ArticleID=849.

To Audit Assets on Demand:

1. In the **Inventory** grid, select the Asset you want to audit.

   You can also audit an Asset from the Asset page: click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**. Click the **Audit Now** icon on the Asset page toolbar.

2. Click the **Audit Workstations** icon on the Inventory toolbar.

   The Audit Workstation tab opens displaying the Asset Name, Status (icon) and Audit Queue Status Name, e.g., Waiting or Requested. When the audit is complete, the Status column displays a checkmark icon, and the Audit Queue Status Name column displays "Succeeded".

3. If the audit fails, the Status column will display a red "x" icon, and the Audit Queue Status Name will display "Audit Failed".
   a. Click the View Extended Information button.
      The Extended Information dialog displays with the reasons for the failed audit.

4. Click the **Close** button on the **Audit Workstation** tab.
   For information on viewing audit results, see the topics below.

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

Including and Excluding Computers from Scheduled Audits (BMC Track-It! Web)

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" at
http://support.numarasoftware.com/support/view_article.asp?ArticleID=849.
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. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click Open. The Asset record opens.
2. The **Include This Asset in Scheduled Audit Operations** checkbox is selected by default. If you want to exclude the Asset from scheduled audits, deselect the checkbox.

The **Included in Scheduled Audits** column in the **Inventory** grid displays "Yes" for all computers with scheduled audits (and "No" for excluded computers). (See Viewing, Showing, and Hiding Columns Viewing Information in Grids (BMC Track-It! Web) for information on showing the column.)

Viewing Audit Results

Software

Viewing Software Audit Results (BMC Track-It! Web)

The lists of audited software and related executable files (such as .exe) are displayed on the **Software** tab of a particular computer's record (in the **Inventory** module).
To View an Individual Computer's Audited Software:

1. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**. The Asset record opens.
2. From the **Software** tab, select the **Programs** tab or the **Files** tabs to view the audited software and files.
3. You can filter the audit results by selecting one of the following options from the **Views** drop-down list:

   - Alerts - (Prohibited & Unidentified) - This is the default view
   - Prohibited
   - Approved - Supported
   - Permitted - Unsupported
   - Unidentified

   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** dialog displays the following information:
   - Publisher
   - Program Name
   - Version
   - Software Title
   - Number of Installations

   The **Installed File** dialog displays the following information:
   - File Name
   - File Size
   - File Description
   - File Vendor
   - File Version
   - Product Description
   - Product Version
   - Software Title
   - Number of Installations

Viewing All Assets with a Specific Program or File (BMC Track-It! Web)

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. In the **Inventory** grid, click the **Asset ID** link to open the Asset.
   You can also click the **Expand** button (+) in the first column of the grid, then click **Open**. The Asset record opens.
2. On the **Software** tab, select the **Programs** tab or the **Files** tab.
3. Select the **Program** or **File**, then click the **Show Assets** button.
   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 (BMC Track-It! Web)

The lists of audited software and related executable files (such as .exe) is displayed on the **Software** tab of a particular computer's record in the **Inventory** module.

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. In the **Inventory** grid, click the **Asset ID** link to open the Asset.
   You can also click the **Expand** button (+) in the first column of the grid, then click **Open**. The Asset record opens.
2. On the **Software** tab, select the **Programs tab** or the **Files** tabs to view the audited software and files.
3. Select an option from the **Views** drop-down list (such as Unidentified).
4. Select the software application or applications (you can select multiple items at once), then select an option from the **Change State** button, e.g., "Change State to Approved **-** Supported".
   The software is moved to the new status list.
5. Click the **Save** button.

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

Viewing Captured File Information (BMC Track-It! Web)

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.

To View Captured File Information:

1. In the **Inventory** grid, click the **Asset ID** link to open the Asset.
   You can also click the **Expand** button (+) in the first column of the grid, then click **Open**. The Asset record opens. If the **Inventory** module is not already open, select **Inventory** from the **BMC Track-It! Web** toolbar.
2. Select the **File Information** tab.
3. Select the file from the **Captured File** drop-down list.
   The captured files details display.

Hardware

Viewing Hardware Audit Results (BMC Track-It! Web)

You can 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 also view the information in several filtered lists (Views), such as Networking Information.

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, as described in the steps below for editing attributes and resuming 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 audits)
				▪ Views
				  ▪ Computer Configuration
				  ▪ Computer Availability
				  ▪ Computer Information
				  ▪ Networking Information

CPU	Serial number, processor, etc.			
Operating System	Version, service pack #, product ID, etc.			
Memory				
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. Select **Inventory** from the **BMC Track-It! Web** toolbar.
   The **Inventory** module displays and Assets are listed in the grid.
2. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
3. Select the **Hardware** tab.
4. To view audit results by date, select the date and time from the **Audit Date** drop-down list, or use the **forward** and **back** buttons.
5. To view an explanation for statuses, e.g. "C" for "Changed since previous audit", click the **Status Legend** link.
6. To view more information, such as Computer Availability or Networking, select a view from the **View** drop-down list. (Computer Configuration displays by default.)
   The pane's title bar displays the current view.
7. To collapse and expand information for all components:
   a. Click the **plus (+) icon** to display all of the details for all components.
   b. Click the **minus (-) icon** to collapse the details and show component names only.
8. To collapse and expand information for individual components, click the **triangle icon** next to each component.

To Edit Hardware Attributes:
Note: If you edit an attribute, it will not be updated during future audits. However, you can select to resume updates, as described in the section below.

1. Double click the component's attribute, or select it and click the **Open** button to display the attribute's dialog box.
2. Enter your changes in the attribute's dialog box, then click the **OK** button.
   The attribute's Status displays "M" for "Manually Changed" as described in the table above.
3. Click the **Save** button.

To Resume Updating Attributes During Audits If The Attribute has Been Manually Entered:

1. Select the attribute (this will have a Status of "M" for "Manually Changed", then click the **Resume Updates** button.
2. Click "Yes" when the **Resume Updates** confirmation message displays.
   The audit process will overwrite the manually entered values.
3. Click the **Save** button.

See also: Tracking Items for an Asset (Overview) BMC Track-It! Web, Promoting Items to Assets (BMC Track-It! Web), and Auditing Assets on Demand (BMC Track-It! Web)

Tracking Items

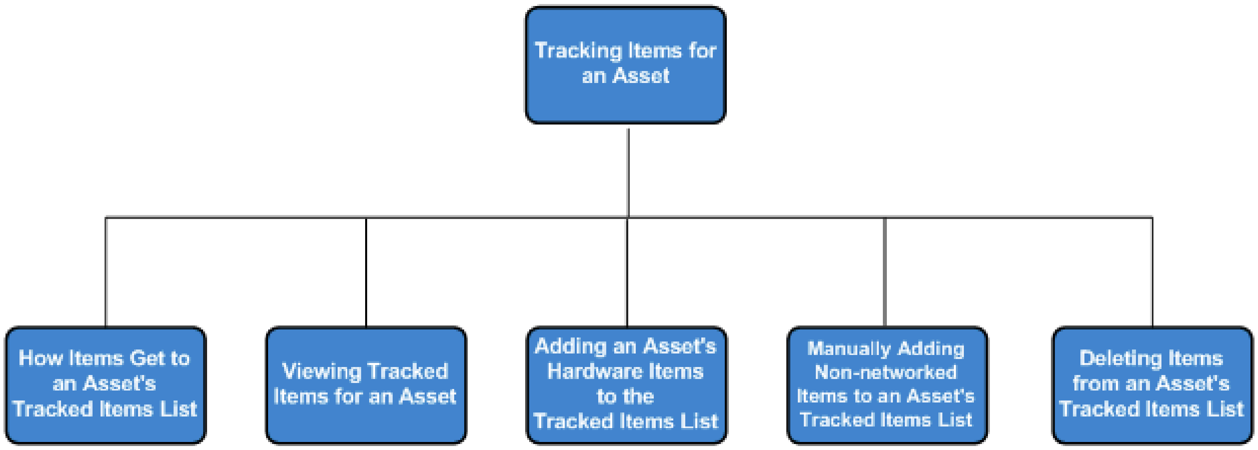
Tracking Items for an Asset (Overview) BMC Track-It! Web

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 for an Asset (Workflow) BMC Track-It! Web).

Tracking Items for an Asset (Workflow) BMC Track-It! Web

The flowchart below represents the tasks in the following topics.



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 (BMC Track-It! Web)

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 for an Asset:

1. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
2. On the **Asset** window (usually Computer or Server), select the **Tracked Items** tab.
   The list of Tracked items displays (such as the computer's serial number and operating system).

   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)

   Other items in the Tracked Items list display, as explained in How Items Get to an Asset's Tracked Items List.

Tip: To see more columns in the Tracked Items list, see Showing and Hiding Columns in Viewing Information in Grids (BMC Track-It! Web).

Adding an Asset's Hardware Items to the Tracked Items List (BMC Track-It! Web)

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. You can add additional hardware items that you want to track to the Asset's Tracked Item list.

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. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
2. Select the **Hardware** tab.
3. Select the item you want to transfer, then click the **Create Tracked Item** button.
4. On the **Tracked Item** dialog, you can add information in the fields listed below (if they are not already populated).
5. When you are finished entering information, click the **OK** button.
   The item displays on the **Tracked Item** dialog.

Tip: To see more columns in the Tracked Items list (such as Product Type or Manufacturer), see Showing and Hiding Columns in Viewing Information in Grids (BMC Track-It! Web).

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

Manually Adding Non-networked Items to an Asset's Tracked Items List (BMC Track-It! Web)

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. (The Master Items list is created in the BMC Track-It! Technician Client by the BMC Track-It! Administrator or Technicians with permissions.)
To Manually Add an Item to an Asset's Tracked Items List:

1. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
2. Select the **Tracked Items** tab, then click the **Add** button.

3. 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.
4. On the **Tracked Item** dialog, you can add information in the fields below (if they are not already populated).
5. When you are finished entering information, click the **OK** button.
   The item displays on the **Tracked Items** tab.

Deleting Items from an Asset's Tracked Items List (BMC Track-It! Web)

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 delete 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. In the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
2. On the **Asset** window (usually Computer or Server), select the **Tracked Items** tab.
3. In the **Tracked Items** list, select the item to delete, then click the **Delete** button.
4. Click Yes on the **Delete Tracked Item** confirmation dialog.
   The item is removed from the **Tracked Item** list.
5. Click the **Save** button on the **Asset** window.

To Restore an Item to the Tracked Items List:

1. Click the **Restore** button on the **Tracked Items** tab toolbar.
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. Click the **Restore** button on the **Tracked Items** tab toolbar.
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.

Retiring Assets

Retiring Assets (BMC Track-It! Web)

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 its tracked items to Unassigned Equipment. You may want to do this if you are tracking items, such as a printer and software, so you can reassign them 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.

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

1. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. In the **Inventory** grid, select the Asset(s) you want to retire, then click the **Retire** button on the toolbar.
   (You can also retire an asset after opening the asset record.)

   If the asset has any tracked items, the number of tracked items displays on the **Retire Asset(s)** dialog.
3. If you want to transfer the tracked items to **Unassigned Equipment** when the asset is retired, select the **Transfer [x] associated tracked items to "Unassigned Equipment"** checkbox.

   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. A **Retire Assets** confirmation dialog displays confirming that the asset was retired successfully and the tracked items were moved to "Unassigned Equipment" (if that option was selected above). Click the **OK** button.

   The asset is removed from Inventory.
5. To view a list of Retired Assets, 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. Select **Inventory** from the **BMC Track-It! Web** toolbar.
2. Select a **All Retired Assets** from the **Views** menu on the **Menu Bar**.
   The Retired Assets display in the grid.

3. To view read-only details, in the **Inventory** grid, click the **Asset ID** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**.
4. On the **Cannot Modify Retired Asset** confirmation dialog (which explains that the asset was retired and you can open it in read-only mode), click the **OK** button.

   The Asset record opens. The retired date and time display in the **Retired Date** field of the **General Information** panel, along with the name of the Technician who retired the asset.

   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.

Purchasing: Managing Purchases

Purchasing Module Overview (BMC Track-It! Web)

You can create and track purchase orders with the BMC Track-It! Web Purchasing module, which is integrated with the **Inventory module** and **Software License Management** modules. (You can access the Software License Management module from Track-It! Technician Client.)

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)

Viewing and Finding Purchase Orders (Track-It! Web)

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 **BMC Track-It! Web** toolbar.
2. To open a Purchase Order, do one of the following:
    - Click the **Purchase Order Number** link
    - Select the Purchase Order and click **Open**
    - Click the **Expand** button (+) in the first column of the grid, then click **Open**.

The **General Information** section displays the most commonly-used fields to describe the Purchase Order: Requestor, Purchase Order Number, Date Ordered, Date Required, Date Received, etc.

Additional information about the Purchase Order is displayed in other sections (Custom Fields, Vendor Information, Shipping and Billing, Notes) and on tabs (Items, Licenses, and Attachments).

Customizing the Purchase Order's Tab Displays (BMC Track-It! Web)

When you open a Purchase Order, by default, certain tabs display, such as General Information and Vendor Information. Two panes display at a time (on the left and the right). You can customize how much information displays at a time by collapsing, expanding, and rearranging panels.

The left pane contains the following panels, which you can collapse, expand, and rearrange:

- General Information
- Custom Fields
- Vendor Information
- Shipping and Billing
- Notes

The right pane contains the following tabs with additional information about the Asset:

- Items
- Licenses
- Attachments (and number of attachments)

You can collapse and expand the panels, but the tabs cannot be rearranged.
To Customize the Tab Display:

1. To collapse and expand panels, click the **Expand/Collapse** buttons at the top right of each panel.
2. To rearrange panels on the left pane, point to the panel header (such as General Information) until you see the crosshairs, then drag and drop the panel to the desired location on the pane.

   The new tab layout will persist when the window is reopened.

See also: Viewing Information in Grids (BMC Track-It! Web).

Creating Purchase Orders

Creating Purchase Orders (BMC Track-It! Web)

The first step to creating a Purchase Order in BMC Track-It! Web 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:
General Information

1. Select **Purchasing** from the **BMC Track-It! Web** toolbar.
2. Click **New Purchase Order** on the **Purchasing** toolbar.
3. Enter a number for the purchase order in the **Purchase Order Number** field (required).
4. Select or enter the date the item was ordered in the **Date Ordered** field.
5. 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.
6. Enter the payment terms (such as Net 30) in the **Payment Terms** field.
   Your BMC Track-It! Administrator may have set up the Purchasing module to automatically generate sequential purchase order numbers for new purchase orders. If so, this field will be automatically populated. (See Enabling Automatic Generation of Purchase Order Numbers in the Administrator's Guide.)
7. 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.

Entering Vendor Information on Purchase Orders

To Enter Vendor Information on Purchase Orders:

1. In the **Vendor Information** section of the Purchase Order, select the vendor from the **Vendor** drop-down list.
   The **Address** and **Contact** information will automatically display for the selected vendor if the information has been set up by the Administrator 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.

Verifying Shipping and Billing Information for Purchase Orders (Track-It! Web)

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 in the Administrator's Guide). 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. In the **Shipping and Billing** section of the Purchase Order, verify the default information in the **Bill to:** and **Ship to:** text boxes.
   You can make any necessary changes (however, this will not change the default information saved in Lookup Tables).
2. (*Optional*) Enter additional information in the **Shipping Information** text box.

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.

Entering Shipping Charges, Taxes, and Calculating the Total Amount for a Purchase Order (Track-It! Web)

Once you've added items to the Purchase Order from the Master Items list, BMC Track-It! calculates and displays the **Sub-Total** amount on the **Items** tab of the **Purchase Order**. 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. (*Optional*) 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**.

Adding Notes to a Purchase Order (Track-It! Web)

To add notes to a purchase order:

1. In the **Notes** section of the **Purchase Order**, enter text in the textbox.
2. Click the **Save** button when you've finished working with the Purchase Order.

Attaching Files to Purchase Orders (Track-It Web)

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 click Open on the Purchasing task bar.
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 (Track-It! Web)

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. Select the **Purchase Order** on the **Purchase Order** grid, then click the **Copy** button on the toolbar.
2. On the **Copy Purchase Order** dialog, enter the number of copies you want to generate.
3. Select the **Line Items** check box 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. In the **Purchase Orders** grid, select the **Purchase Order**, then click the **Delete** button on the **Purchase Order** toolbar.
2. You can also delete the **Purchase Order** after opening it: Click the **Purchase Order Number** link, or click the **Expand** button (+) in the first column of the grid, then click **Open**. Then click the **Delete** button on the **Purchase Order** toolbar.
3. On the **Delete Purchase Orders** confirmation dialog, click the **Yes** button.
   The Purchase Order is deleted and is removed from the grid.

Printing Purchase Orders (Track-It! Web)

Note: Popup blockers enabled in browsers will prevent a Purchase Order from printing.
To Print Work Orders:

1. Select Purchasing from the **BMC Track-It! Web** toolbar.
2. Select a **Purchase Order**, then click the **Print** button on the toolbar.

E-mailing Purchase Order Details to Requestors and Technicians (BMC Track-It! Web)

You can e-mail Purchase Order details to Requestors and Vendors, as well as other recipients, from BMC Track-It! The message contains pre-populated information (for example,Purchase Order number, Date Ordered, Vendor, and Total price), as well as your own messages.
To E-Mail Purchase Order Details:

1. From the **Purchasing** module, open the **Purchase Order** that you want to e-mail.
2. Click the **E-mail Requestor** or **Email Vendor** button on the toolbar.
3. On the **Send Requestor [or Vendor] Message** dialog box:
   a. The email address for the **Requestor** or **Vendor** automatically displays.
   b. (*Optional*) Enter the e-mail addresses of any other recipients in the **Cc** and **Bcc** fields. (You can enter multiple e-mail addresses separated by commas or semi-colons.)
   c. (*Optional*) Enter a message in the **text box**.
   d. (*Optional*) The Purchase Order's attachments are included in the message by default and display in the **Attachments** section. To exclude the attachments, select the names of the attachments, then click **Delete**.
      1. To view an attachment, select the name of the attachment, and click **Open**.
      2. To delete an attachment, select the name of the attachment, and click **Delete**.
      3. (*Optional*) To add more attachments to the email, click **Add**. On the **Add Attachment** dialog box, browse to the file you want to attach, and click **OK**. The **Uploading File** status dialog displays, and the name of the file displays in the **Attachments** list.
   e. Click the **Send** button.

Receiving Purchased Items into Inventory (Track-It! Web)

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

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. From the **Purchasing** module, open the **Purchase Order**.
2. To receive all items at once, click **Receive All** on the **Items** tab.
3. To receive individual items separately:
    a. Open the received item on the **Items** tab.
    b. On the **Line Item** dialog box, enter the number of items received in the **Quantity Received** field in the **Receiving Information** section.
4. 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 box 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 in the Track-It! Technician's Guide.

To Receive Software with the Software License Management Module:

1. Follow the steps above in To Receive Purchased Items into Inventory.
2. To receive **software**, select the **Create Software License when this item is received** check box.
3. 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

    a. If you selected **Bundle License**, enter the **number of licenses in the bundle** in the specified field.
4. Click the **OK** button.
5. 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**.

Library: Tracking Library Items

Library Overview (Track-It! Web)

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.

Viewing and Finding Library Items (Track-It! Web)

To View Library Items:

1. Select **Library** from the **BMC Track-It! Web** toolbar.
2. The Library grid displays with a list of items by loan status: Checked In, Checked Out, or Overdue.
3. To open a Library item, do one of the following:
    - Click the **Library Item** link
    - Select the **Library Item** and click **Open**
    - Click the **Expand** button (+) in the first column of the grid, then click **Open**.

To work with the grid view, see the chapter on Viewing Information in Grids.
To Find a Library Item:

1. Enter the keyword in the **Search Library Items** field on the main menu, then press the **Enter** key or click the **Search** button.

   The Library Items display on the **Search Results** tab.
2. Click the Library Item link to open the record.

Creating New Library Items (Track-It! Web)

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 **Library** from the **BMC Track-It! Web** toolbar.
2. Click **New Library Item** on the **Library** toolbar.
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 Checked In, Checked Out, or Overdue.
6. You can enter comments about the item on the **Comments** tab.

Loaning Library Items (Track-It! Web)

Checking Out Items

To Check Out Library Items:

1. Select **Library** from the **BMC Track-It! Web** toolbar.
2. Select the library item in the grid, then click **Check Out** on the **Library** tool 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** on the **Library** tool bar.
2. Click Yes on the **Check In** confirmation dialog.
   The Item's status changes to **Checked In** and displays on the grid.

Change Management: Managing Requests for Change

Change Management Overview (BMC Track-It! Web)

The BMC Track-It! Change Management module provides an automated process to track and manage Requests for Change in your organization. When a Work Order is created that matches the criteria defined in a Change Management Policy it creates an associated Request for Change that is automatically placed into the approval process. Requests for Change are managed by the Work Order's Assigned Technician from the Change Management tab of a Work Order in the Help Desk Module. Approvers who have been assigned to the Request for Change communicate and vote through Self Service 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 the Change Management module or from the Change Management tab on the Work Order.

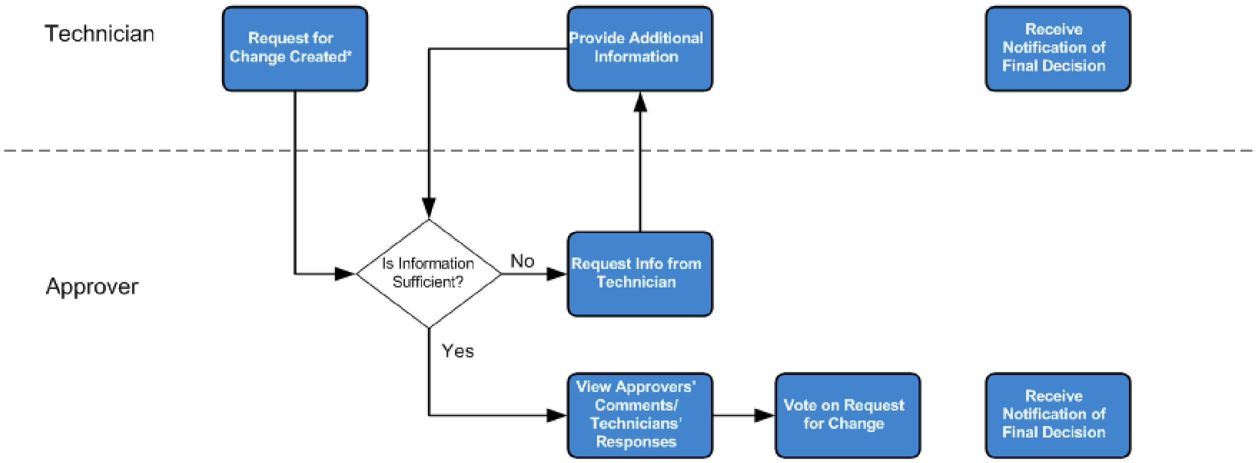
Approvers
Approvers are the change management team members who vote to accept or reject Requests for Change. They can view information and comments, communicate, and vote on a Request for Change using Self Service Web. (A Request for Change is considered approved when all Approvers have approved, based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

Notes:

- 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.
- Approvers can only log on to Self Service web, not to BMC Track-It! Web, which is used only by Technicians to manage work orders.

Change Management Workflow (BMC Track-It! Web)

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



*Requests for Change can be created in two ways:
1) automatically when Work Orders are created that match Change Management policies, or
2) manually created by the Technician

Managing Requests for Change (Technicians - Track-It! Web)

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.

Note: Requests for Change can be manually created in the BMC Track-It! Technician Client.

See also: Change Management Overview

To View Requests for Change from the Change Management Module:

1. **S**elect **Change Management** from the **BMC Track-It! Web** toolbar.
   Note: Overdue Requests for Change are highlighted.

2. To open a **Request for Change**, do one of the following:
   - Click the **Request for Change** link
   - Select the **Request for Change** and click **Open**
   - Click the **Expand** button (+) in the first column of the grid, then click **Open**.

To View A Work Order Associated with a Request for Change:

1. Select **Help Desk** from the **BMC Track-It! Web** toolbar.
2. Click the **Work Order ID** link.
3. 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 (Simulaneous or Sequential)
- Approvers
    - Approver (name)
        - Comments - **Expand (+)** button
    - Status (Evaluating, Pending Technician Response, Pending Prior Approval, Approved, or Rejected)
- Actions
    - Respond to Reviewer
    - E-mail Approver
    - Change Approver

To View an Approver's Comments:

1. Click the **Expand (+)** button next to the Approver's name.

    You can also view this information on the printed Request for Change.

To Respond to an Approver's Request for Information:

When an Approver requests information on a Request for Change via BMC Track-It! Web, you can respond from the **Change Management** module or the **Change Management** tab on the Work Order.

1. On the **Request for Change** dialog box (or the **Change Management** tab of the Work Order), click the **Respond to Approver** button, enter your comments in the **Response** text box, then click the **Send** button.
2. Click the **Close** button on the **Request for Change** dialog box.

    Your response displays on the following:

    - The **Change Management** tab (under **Technician's Response**) along with your user name
    - The **Comments** section on the RFC in **BMC Track-It! Technician Client**
    - The printed version of the RFC in **BMC Track-It! Technician Client**

To E-mail Approvers:

1. To e-mail an individual Approver (who has not yet voted), on the **Request for Change** dialog box, 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 **Request for Change** dialog box.

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 click 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 **Find Approver** dialog box 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).

Manually Creating a Request for Change (Track-It! Web)

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 **Change Management** from the **BMC Track-It! Web** toolbar.
2. Click **New Request for Change** on the **Change Management** toolbar.
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 in the Help Desk module also displays details for the associated Request for Change.

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. Select **Change Management** from the **BMC Track-It! Web** toolbar.
2. Select the **Request for Change**, then click the **Print** button on the **Change Management** toolbar.

BMC Track-It! 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 at http://support.numarasoftware.com/support/updates.asp?product=2&content=Documentation&version=11&Offering=2&lang=EN

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)

iPhone/iPad (Quicktime.mov)

Android (.swf)

Index