BMC® Remedy® Service Desk: Problem Management 7.0

User's Guide

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Contacting Us

If you need technical support for this product, contact Customer Support by email at `support@remedy.com`. If you have comments or suggestions about this documentation, contact Information Development by email at `doc_feedback@bmc.com`.

This edition applies to version 7.0 of the licensed program.

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Contents

Preface

The *BMC Remedy Service Desk: Problem Management 7.0 User's Guide* describes how to use the BMC® Remedy® Problem Management application. Problem Management is one of five BMC Remedy IT Service Management applications.

The BMC® Remedy® IT Service Management Suite (BMC® Remedy® ITSM Suite) includes:

- The BMC® Remedy® Asset Management application.
- The BMC® Remedy® Change Management application.
- The BMC® Remedy® Service Desk solution (which includes the BMC® Remedy® Incident Management application and the BMC® Remedy® Problem Management application).
- The BMC® Service Level Management application.

The applications run in conjunction with the BMC® Remedy® Action Request System® platform (BMC® Remedy® AR System® platform) and share a common database. All five applications consume data from the BMC® Atrium® Configuration Management Database (CMDB) application.

Best Practice and New icons

Documentation for the BMC Remedy ITSM Suite contains two icons.

Icon	Description
	The New icon identifies features or products that are new or enhanced with version 7.0.
	The Best Practice icon highlights processes or approaches that BMC has identified as the most effective way to leverage certain features in the suite.

About the BMC Remedy IT Service Management Suite

There have been several updates to the BMC Remedy ITSM Suite since version 6.0.

Note the change to the BMC® Remedy® Help Desk application. BMC is now offering the BMC Remedy Service Desk solution, which contains the following applications:

- BMC Remedy Incident Management
- BMC Remedy Problem Management

BMC Atrium CMDB 2.0

BMC Atrium CMDB 2.0 is installed with Asset Management, Change Management, and Service Desk (including Incident Management and Problem Management). It stores information about configuration items and their relationships in an inheritance-based data model, and has the ability to reconcile data from different sources. BMC Atrium CMDB 2.0 provides a "single source of truth" about your IT environment, enabling other BMC applications to manage CIs, predict the impact of configuration changes, and perform other Business Service Management (BSM) functions.

For more information, see the *BMC Atrium CMDB 2.0 User's Guide.*

BMC Remedy Asset Management 7.0

The BMC Remedy Asset Management application lets IT professionals track and manage enterprise configuration items (CIs)—and their changing relationships—throughout the entire CI life cycle. As part of the BMC Remedy ITSM Suite, Asset Management is integrated with BMC Remedy Service Desk (which contains the BMC Remedy Incident Management and BMC Remedy Problem Management applications), BMC Remedy Change Management, and BMC Service Level Management, and offers flexibility to support customized business processes.

For more information, see the *BMC Remedy Asset Management 7.0 User's Guide*.

BMC Remedy Change Management 7.0

Using ITIL-compatible best practices, BMC Remedy Change Management provides IT organizations with the ability to manage changes by enabling them to assess impact, risk, and resource requirements, and then create plans and automate approval functions for implementing changes. It provides scheduling and task assignment functionality, and reporting capabilities for reviewing performance and improving processes. Because Change Management is integrated with BMC Atrium CMDB, Change Management lets you relate changes to other records, such as configuration items (including services) and incidents.

For more information, see the *BMC Remedy Change Management 7.0 User's Guide.*

BMC Remedy Incident Management 7.0

BMC Remedy Incident Management is used to manage incidents. Incident management is reactive, and is typically initiated in response to a customer call or automated event. An example of an automated event might be an alert from a monitoring system, such as BMC® Service Impact Management (BMC® SIM). The primary goal of the incident management process, according to ITIL standards, is "to restore normal service operation as quickly as possible with minimum disruption to the business, thus ensuring that the best achievable levels of availability and service are maintained."

An incident is any event that is not part of the standard operation of a service and that causes an interruption to or a reduction in the quality of that service. Normal service operation is the operation of services within the limits specified by Service Level Management (SLM).

For more information, see the *BMC Service Desk: Incident Management 7.0 User's Guide*.

BMC Remedy Problem Management 7.0

BMC Remedy Problem Management is used to manage problem investigations, known errors, and Solution Database entries. Problem management can proactively prevent the occurrence of incidents, errors, and additional problems. A problem investigation helps an IT organization get to the root cause of incidents. It initiates actions that help to improve or correct the situation, preventing the incident from recurring.

After a problem investigation identifies the cause, this information can result in either a known error or a Solution Database entry. A known error is a problem that has been successfully diagnosed and for which a temporary work-around or permanent solution has been identified. A Solution Database entry contains information that might be required to provide or restore a service.

For more information, see the *BMC Service Desk: Problem Management 7.0 User's Guide*.

BMC Service Level Management 7.0

BMC Service Level Management enables a service provider, such as an IT organization, a customer support group, or an external service provider, to formally document the needs of its customers or lines of business using service level agreements, and provide the correct level of service to meet those needs.

Service Level Management also provides a means to review, enforce, and report on the level of service provided. It streamlines the most important task of all, which is the communication between a service provider and its customers. Multiple service targets can be defined and monitored, acting as a bridge between IT service support and IT operations. This enables costs to be controlled and helps to provide a consistent level of service in support of a key business service.

For more information, see the *BMC Service Level Management 7.0 User's Guide*.

Audience

Problem Management is intended for the following IT professionals:

- IT support staff
- Problem managers

BMC Remedy IT Service Management Suite documents

The following table lists the documentation available for the BMC Remedy ITSM Suite.

Unless otherwise noted, online documentation in Adobe Acrobat (PDF) format is available on product installation CDs, on the Customer Support website (`http://supportweb.remedy.com`), or both. You can order printed documentation from `SMBU-Upgrade@bmc.com`.

Note: To access the support website, you must have a support contract.

You can access application Help by clicking on Help links within the application.

Title	Document provides	Audience	Format
ITSM Configuration Quick Start	Start with this reference card to quickly install and configure applications in the ITSM suite.	Administrators	Print and PDF
BMC Remedy Action Request System 7.0 Concepts	Concepts for using the Action Request System.	Administrators	Print and PDF
BMC Remedy Action Request System 7.0 Installing	Procedures for installing the Action Request System.	Administrators	Print and PDF
BMC Atrium CMDB 2.0 Common Data Model Diagram	Hierarchical diagram of all classes in the CDM, including unique attributes and applicable relationships.	Administrators	PDF

Title	Document provides	Audience	Format
BMC Atrium CMDB 2.0 Common Data Model Help	Description and details of superclasses, subclasses, attributes, and relationships for each class.	Administrators	HTML
BMC Atrium CMDB 2.0 Concepts and Best Practices Guide	Information about CMDB concepts and best practices for planning your BMC Atrium CMDB implementation.	Executives and administrators	Print and PDF
BMC Atrium CMDB 2.0 Developer's Reference Guide	Information about creating API programs, C and Web Services API functions and data structures, and a list of error messages.	Administrators and programmers	PDF
BMC Atrium CMDB 2.0 Help	Help for using and configuring BMC Atrium CMDB.	Users and administrators	Product Help
BMC Atrium CMDB 2.0 Installation and Configuration Guide	Information about installing and configuring BMC Atrium CMDB, including permissions, class definitions, reconciliation, and federation.	Administrators	Print and PDF
BMC Atrium CMDB 2.0 Javadoc API Help	Information about Java classes, methods, and variables that integrate with BMC Atrium CMDB.	Programmers	HTML
BMC Atrium CMDB 2.0 Master Index	Combined index of all books.	Everyone	Print and PDF
BMC Atrium CMDB 2.0 Release Notes	Information about new features and known issues.	Everyone	Print and PDF
BMC Atrium CMDB 2.0 User's Guide	Information about using BMC Atrium CMDB, including searching for CIs and relationships, launching federated data, reporting, and running reconciliation jobs.	Users	Print and PDF
BMC Remedy 7.0 Approval Server Guide for Users and Administrators	Topics on installation and configuration of the Approval Server, how to use the Approval Server, and understanding the approval workflow.	Users and administrators	Print and PDF
BMC Remedy IT Service Management 7.0 Configuration Guide	Procedures for configuring the BMC Remedy IT Service Management applications.	Administrators	Print and PDF

Title	Document provides	Audience	Format
BMC Remedy IT Service Management 7.0 Installation Guide	Procedures for installing the BMC Remedy IT Service Management applications and solutions: BMC Remedy Service Desk solution (BMC Remedy Incident Management and BMC Remedy Problem Management), BMC Remedy Change Management, and BMC Remedy Asset Management.	Administrators	Print and PDF
BMC Remedy Asset Management 7.0 Help	Help for using BMC Remedy Asset Management.	Everyone	Product Help
BMC Remedy Asset Management 7.0 Release Notes	Information about known issues in each release of BMC Remedy Asset Management. Also provides a list of new features included with the application.	Everyone	Print and PDF
BMC Remedy Asset Management 7.0 User's Guide	Procedures for using the BMC Remedy Asset Management application; includes new features and overview.	Everyone	Print and PDF
BMC Remedy Change Management 7.0 Help	Help for using BMC Remedy Change Management.	Everyone	Product Help
BMC Remedy Change Management 7.0 Release Notes	Information about known issues in each release of BMC Remedy Change Management. Also provides a list of new features included with the application.	Everyone	Print and PDF
BMC Remedy Change Management 7.0 User's Guide	Procedures for using the BMC Remedy Change Management application; includes new features and overview.	Everyone	Print and PDF
BMC Remedy Service Desk 7.0 Release Notes	Information about known issues in each release of BMC Remedy Service Desk: Incident Management and BMC Remedy Service Desk: Problem Management. Also provides a list of new features included with the application.	Everyone	Print and PDF
BMC Remedy Service Desk: Incident Management 7.0 Help	Help for using BMC Remedy Incident Management.	Everyone	Product Help
BMC Remedy Service Desk: Incident Management 7.0 User's Guide	Procedures for using the BMC Remedy Service Desk: Incident Management application; includes new features and overview.	Everyone	Print and PDF

Title	Document provides	Audience	Format
BMC Remedy Service Desk: Problem Management 7.0 Help	Help for using BMC Remedy Problem Management.	Everyone	Product Help
BMC Remedy Service Desk: Problem Management 7.0 User's Guide	Procedures for using the BMC Remedy Service Desk: Problem Management application; includes new features and overview.	Everyone	Print and PDF
BMC Service Level Management 7.0 Configuration Guide	Procedures for configuring the BMC Service Level Management application.	Administrators	Print and PDF
BMC Service Level Management 7.0 Configuration Help	Help for configuring the BMC Service Level Management application.	Administrators	Product Help
BMC Service Level Management 7.0 Installation Guide	Procedures for installing the BMC Service Level Management application.	Administrators	Print and PDF
BMC Service Level Management 7.0 Release Notes	Information about known issues in each release of BMC Service Level Management. Also provides a list of new features included with the application.	Everyone	PDF
BMC Service Level Management 7.0 User Help	Help for using the BMC Service Level Management application.	Everyone	Product Help
BMC Service Level Management 7.0 User's Guide	Procedures for using the BMC Service Level Management application; includes new features and overview.	Everyone	Print and PDF
BMC Remedy 7.0 Task Management Administrator's Guide	Procedures to configure Task Management. **Note:** This guide also includes steps to configure seamless authentication between BMC Remedy Change Management and the other components of BMC Remedy Change and Configuration Management (CCM).	Administrators	Print and PDF

Chapter

1 Introducing BMC Remedy Problem Management

The Service Desk: Problem Management application is used to manage problem investigations, known errors, and Solution Database entries. Problem management can proactively prevent the occurrence of incidents, errors, and additional problems.

An important ITIL objective is investigating and resolving problems in a continuing effort to cut costs and improve services. A problem investigation helps an IT organization get to the root cause of incidents. It initiates actions that help to improve or correct the situation, preventing the incident from recurring. For example, if computers are running low on disk space, ideally the problem can be resolved before it becomes an incident.

After a problem investigation identifies the cause, this information results in either a known error or a Solution Database entry. A known error is a problem that has been successfully diagnosed and for which a temporary work-around or permanent solution has been identified. A Solution Database entry contains information that might be required to provide or restore a service.

The following topics are provided:

Installing and configuring Problem Management

Your administrator installs and configures Problem Management. For details, see:

- *BMC Remedy IT Service Management 7.0 Installation Guide*
- *BMC Remedy IT Service Management 7.0 Configuration Guide*

What's new in Problem Management 7.0

The new features in this release of Problem Management include:

- **Improved ITIL conformance**—A new process flow tool helps you follow ITIL processes for problem investigations.
- **Enhanced user interface**—The user interface is now more consistent with other BMC applications. To help speed use of the application, forms and dialog boxes have been streamlined, and Quick Action accelerators have been added.
- **Role-based consoles**—Support staff and managers have separate consoles.
- **Permission model**—Permissions and functional roles have been enhanced to provide greater flexibility in setting up user access. For details, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.
- **Task management**—You can assign tasks to one or more people without changing the assignment of the problem investigation, known error, or Solution Database entry. For previous users of Problem Management, this replaces the work log action feature. Now you can assign and view tasks without going into the work log.
- **Cost tracking**—The cost for each investigation can be tracked as the investigation moves between support groups for diagnosis, resolution, and closure, based on either flat-rate or time-based costs.
- **Direct view into BMC Atrium CMDB**—This allows you to manage configuration items (CIs) from Problem Management.

- **Reporting**—Problem Management now includes reports as described in the following table.

Report	Description
Open problem investigations	This lists open problem investigation records grouped by status and Problem Manager group.
Problem investigations by root cause	This lists problem investigations grouped by root cause.
Resolved problem investigations	This lists resolved and closed problem investigation records grouped by status and Problem Manager group.
Open known errors	This lists open known errors, which includes known errors with a status of: assigned, assigned to vendor, no action planned, and scheduled for correction. The listing is grouped by status and Problem Manager group.
Resolved known errors	This lists resolved known errors, which includes known errors with a status of: canceled, closed, and corrected. The listing is grouped by status and Problem Manager group.

- **Enhanced audit log**—You can now filter the audit log, for example, to see only date field audit records or assignment changes.
- **Terminology changes**—There are several terminology changes, including the terms listed in the following table.

Table 1-1: Key terminology changes in Problem Management

Previous term	New term
Associate	Relate
Associations	Relationships
Automatic Routing	Auto Assign
Delete	Remove—This change applies only to the Relationship and Financial tabs, to clarify the action being performed.
Service Categorization	Operational Categorization

Table 1-1: Key terminology changes in Problem Management

Previous term	New term
Work Log	Work Info
Work Log Action	Task

What's new for Help Desk users

This release replaces BMC® Remedy® Help Desk with Incident Management and Problem Management. In addition to the features mentioned, new Problem Management features for former Help Desk users include:

- **Enhanced problem management**—The Problem Investigation form is separate from the Incident form. Problem Management includes new processes to manage the life cycle of a problem investigation, and also known errors and Solution Database entries.
- **Navigation pane**—Located on the left side of consoles and forms, this provides access to common functions, such as assigning an investigation to yourself.
- **Multi-tenancy**—This makes it possible to host multiple companies and their data on a single server. This feature can also be used for any groups, such as business units or departments, whose data must be kept separate. Multi-tenancy is limited to the company level in Problem Management. Configuration can differ on a per-company basis. Multi-tenancy from the user's perspective is accessed by selecting the appropriate company from the list next to the Company field.
- **Root cause and known error**—Problem Management makes better use of root cause and known error.
- **Functional roles**—Additional roles are available, including problem manager.
- **Categorization**—This is recorded separately for operational and product categorization, each with multiple levels to provide greater flexibility. Due to multi-tenancy, each company or business unit can be configured with its own categorization.
- **Prioritization**—Incident priority is now determined by impact and urgency. This can be configured by an administrator, as described in the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

- **Terminology changes**—You can find a terminology change in the following table.

Table 1-2: Key terminology change between Help Desk and Problem Management

Help Desk term	Problem Management term
Bulletin Board	Broadcast

Problem Management user roles

Problem Management provides functionality for both support staff and managers.

Important: The permission model in Problem Management has had several updates since version 6.0. To define permissions and functional roles, review the permissions and functional roles sections in the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

Support staff

Support staff work on problem investigations, known errors, and solution entries as assigned.

Their responsibilities include:

- Investigating and validating assigned tickets.
- Relating assigned tickets to other records.
- Recommending action to be taken with problem investigation results or known errors.
- Creating and activating Solution Database entries.

To complete tasks described in the support staff sections of this guide, support staff require the permission of Problem User to access the Problem Management application.

Problem manager

Problem managers are responsible for the quality and integrity of the problem management process. Problem managers have full access to problem investigations, known errors, and solution entries assigned to their support groups.

Their responsibilities include:

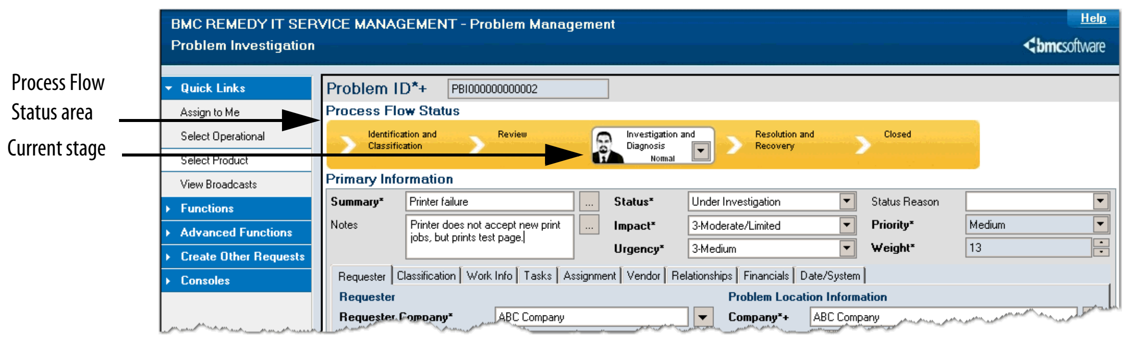
- Monitoring problem investigations and known errors.
- Reviewing problem investigation requests and performing business impact analysis.
- Coordinating the assignment of problem investigations and known errors to support staff.
- Reviewing completed problem investigations and known errors.

Managers require at least the role of Problem User to access Problem Management. In addition, they must have the functional role of problem manager to perform the duties as manager.

Process flow and the life cycle of a problem investigation

The Process Flow Status area displays the process flow of the problem investigation within the Problem Investigation form. A diagram shows the five stages of a problem investigation, as indicated by best practices, rooted in ITIL processes. The current stage of the investigation is highlighted. The status of the investigation is indicated both by color and text.

Figure 1-1: Process Flow Status area on the Problem Investigation form



The Process Flow Status area also serves as a wizard, guiding you through the stages of the problem investigation life cycle. At each stage, the diagram provides accelerators applicable to the current stage. For example, you can use accelerators to move the investigation to a pending state or to the next stage. When you select an accelerator, a dialog box appears, prompting you to enter the data required to complete the task. You can also enter optional recommended data in the dialog box. By using the process flow accelerators, you are following ITIL best practices.

Figure 1-2: Selecting an accelerator from the Process Flow Status wizard

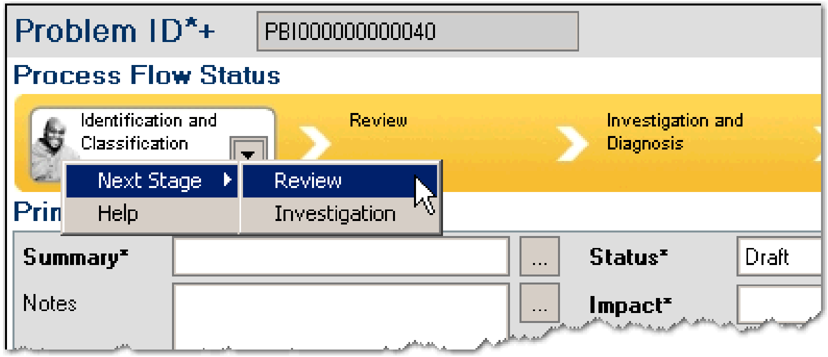


Figure 1-3: Example of form displayed by the Process Flow Status wizard

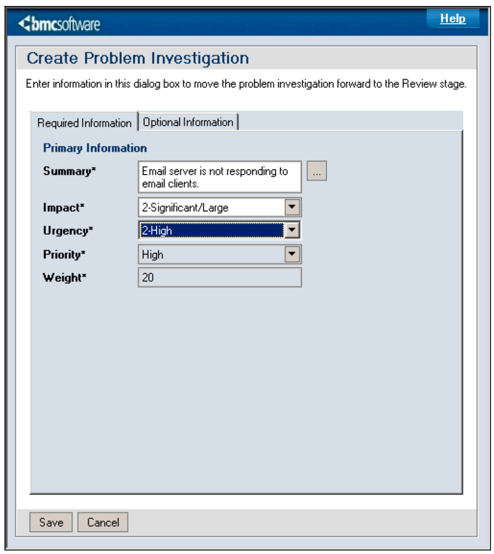


Table 1-3: The five stages of a problem investigation

Incident stage	Description	Tasks
Identification and classification	This stage initiates the problem management process. The purpose of this stage is to accurately identify and classify the problem. For details, see "Identifying and recording a problem investigation" on page 78.	■ Next stage
Review	In this stage, the problem manager validates the impact of the problem and compares the estimated costs of the investigation with those related to the problem while it continues. For details, see "Reviewing problem investigations" on page 134.	■ Next stage ■ Cost analysis ■ Relate incidents ■ Assign investigation ■ Generate tasks ■ Relate to CI ■ Enter pending (or resume)
Investigation and diagnosis	In this stage, you attempt to identify the root cause of the problem. You also attempt to find either a permanent solution or a temporary work-around. For details, see "Investigating and diagnosing a problem investigation" on page 94.	■ Next stage ■ Generate known error ■ Generate work-around and root cause ■ Generate tasks ■ Enter pending (or resume)
Resolution and recovery	In this stage, you resolve the problem. The end result of the investigation might be a known error record or Solution Database entry. For details, see "Resolving a problem investigation" on page 101.	■ Next stage ■ Generate known error ■ Generate work-around ■ Generate solution ■ Close
Closed	In this stage, the investigation is closed. No more activities are performed on the problem investigation.	None

Chapter

2 Using functions common to all ITSM applications

This section contains basic procedures that are common to most forms and consoles. Most of the information in this section is similar throughout the ITSM suite.

The following topics are provided:

Opening the main application console

You start an ITSM application by opening its main console. How you do this depends on whether you want to view the console through the BMC® Remedy® User client or through a browser. See the following instructions for information about opening the main console.

Using BMC Remedy User client to open a main console

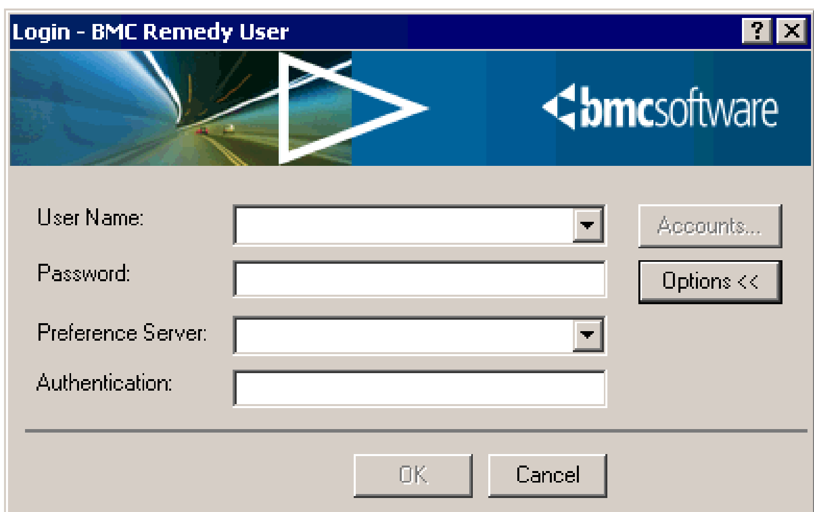
This section describes how to open an application's main console from the IT Home page, by way of BMC Remedy User.

▶ To open the application's main console from BMC Remedy User tool

1 Choose Start > Programs > Action Request System > BMC Remedy User.

The Login dialog box appears.

Figure 2-1: Login dialog box



2 Perform the following steps:

a In the User Name field, type your user name.

b In the Password field, enter your password.

c In the Preference Server field, specify the server name if your administrator set up a preference server for centralized user preferences.

For example, if you have a report server from which you can access predefined reports, you specify it here.

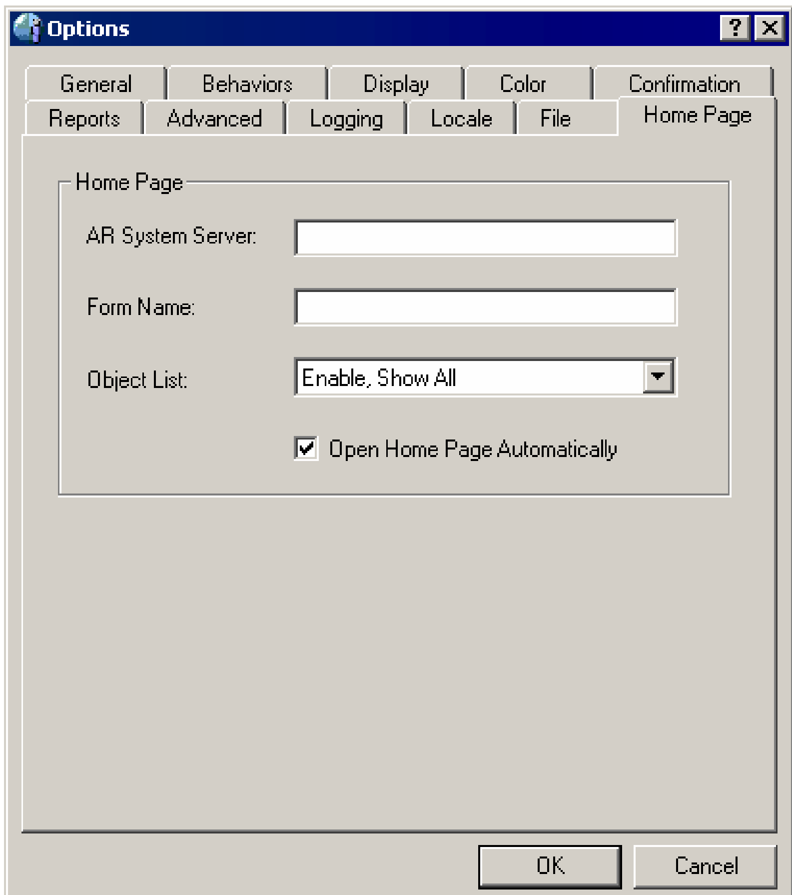
3 Click OK to log in.

The Home Page form opens automatically. If it does not, perform the following steps in BMC Remedy User:

a Choose Tools > Options.

b In the Options dialog box, click the Home Page tab.

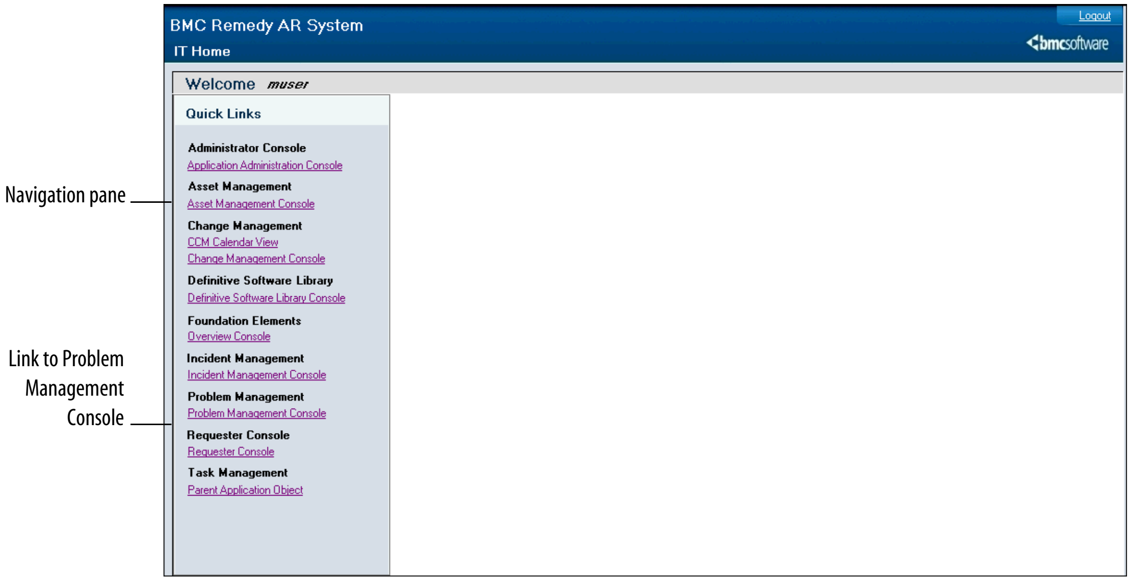
Figure 2-2: Home Page tab on the Options dialog box



c Select the check box to open the home page automatically.

4 When the IT Home page opens, click the Problem Management Console link in the navigation pane.

Figure 2-3: IT Home page



Using a browser to open a main console

This section describes how to open the application's main console from a browser.

To open the main console from a browser

1 Type the following URL in to your browser's address bar:

http://<*web_server*>:<*port*>/arsys/apps/<*arsystem_server*>/Home Page

where:

<*web_server*> is the fully qualified name of the BMC Remedy Mid Tier system, specified in the format *server_name.company.com*.

<*port*> is an optional port number, which is needed if the web server is not on the default port (port 80).

<*arsystem_server*> is the name of your BMC Remedy AR System server.

For a list of supported browsers, see the compatibility matrix at:

`http://supportweb.remedy.com/Rem/IssuesAndSolutions/CompatibilityMatrix/index.jsp`

2 Enter your user name and password, then click Login.

3 When the IT Home page opens, click the Problem Management Console link in the navigation pane.

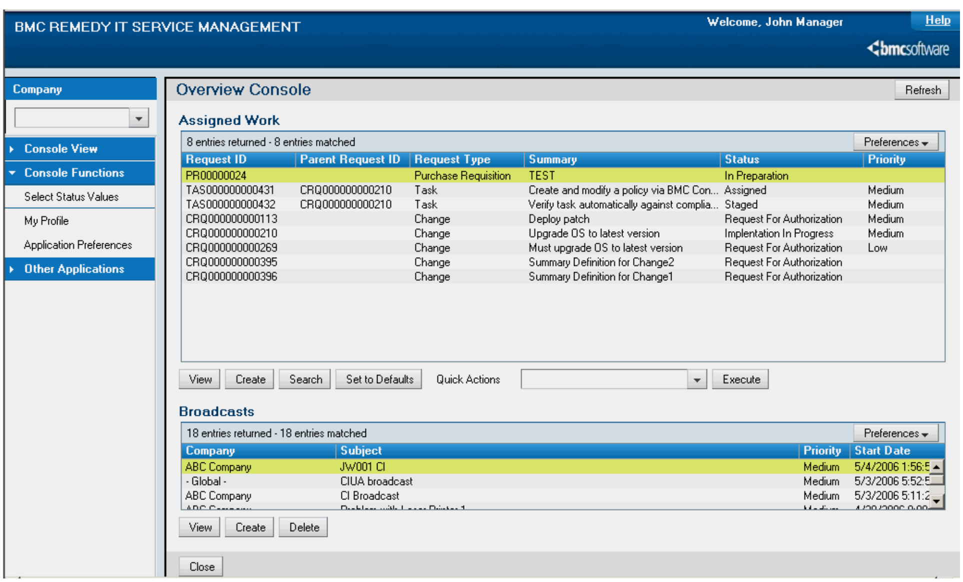
For an illustration of the IT Home page, see Figure 2-3 on page 28.

Working with the Overview console

The Overview console is the primary interface for support staff. It provides quick access to the information you need and to the procedures that you perform most often.

This section discusses how to use the Overview console.

Figure 2-4: BMC Remedy IT Service Management Overview console



Opening the Overview console

The BMC Remedy IT Service Management Overview console provides quick access to commonly performed functions.

▶ To open the Overview console in Windows

1. Open BMC Remedy User as described in "Using BMC Remedy User client to open a main console" on page 26.
2. On the Home Page form, under the Remedy Foundation Elements heading, click the Overview Console link.

   The Overview console appears.

▶ To open the Overview console on the Web

1. Launch your browser as described in "Using a browser to open a main console" on page 28.
2. On the Home Page form, under the Remedy Foundation Elements heading, click the Overview Console link.

   The Overview console appears.

Using the Assigned Work table

The Assigned Work table lists different types of records. The types of records that you can select depend on the BMC Remedy applications that are installed.

Each type of record is identified by a specific prefix:

- **CHG**—Identifies change requests. BMC Remedy Change Management must be installed for you to be able to create and view change requests.
- **SDB**—Identifies Solution Database entries. BMC Remedy Problem Management must be installed for you to be able to create and view solution entries.
- **TSK**—Identifies tasks. Tasks can be attached to incidents, problem investigations, or change management requests.
- **INC**—Identifies incidents. BMC Remedy Incident Management must be installed for you to be able to create and view incidents.

- **PBI**—Identifies problems. BMC Remedy Problem Management must be installed for you to be able to create and view problems.
- **PKE**—Identifies known errors. BMC Remedy Problem Management must be installed for you to be able to create and view known errors.
- **PR**—Identifies purchase requisitions. BMC Remedy Asset Management must be installed for you to be able to create and view purchase requisitions.

You can also change the table's contents by using the Company filter and Console View fields at the top left corner of the console:

- **Company**—Shows records associated with a particular company (useful in a multi-tenancy environment).
- **Personal**—Shows all the records that are assigned to you.
- **Selected Groups**—The options below this heading apply to records that are assigned to your support groups. When you select an option for selected groups, you are prompted to select from all support groups for which you are a member.
  - **Show All**—Shows all records for the groups you select.
  - **Show Unassigned**—Shows all the records that are unassigned to an individual, but which are assigned to the groups you select.
- **All My Groups**—Shows all the records that are assigned to *all* support groups that you belong to. If you belong to more than one support group, the records for all those groups appear.
  - **Show All**—Shows all requests.
  - **Show Unassigned**—Shows all the requests that are unassigned.

In the Windows environment, if there are more records than the system can show in the table, you can see the next grouping of entries by placing the pointer in the table and right-clicking, then choosing either Next or Prev from the menu that appears. When using a browser, use the arrow keys at the top corner of the table.

You can create new records by clicking the Create button that appears below the table.

Creating records

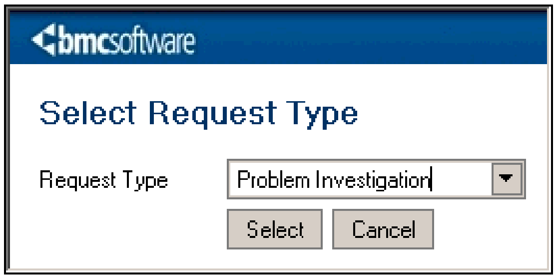
From the Overview console, you can create new records for the various ITSM applications installed on your system.

To create records

1. Click Create.

   The Select Request Type dialog box appears.

   Figure 2-5: Select Request Type dialog box

2. From the Request Type list, select the type of record you want to create.

Note: The available request types depend on which ITSM applications are installed on your system.

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3. Click Select.

   The New form of the application appropriate to the type of record you are creating appears.

4. Enter all the required information to create the request.

   For details on creating a new problem investigation, see "Identifying and recording a problem investigation" on page 78. For more information about creating other types of records, see the related application's user guide.

Searching for records

From the Overview console, you can search for records from the various ITSM applications installed on your system.

▶ To search for records

1. Click Search.

   The Select Request Type dialog box appears.

2. From the Request Type list, select the type of record for which you want to search.

Note: The request types available depend on which ITSM applications are installed on your system.

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3. Click Select.

   A search dialog box appropriate to the type of record for which you are searching appears.

4. Enter search criteria as needed to search for the record.

   For more information about searching for records, see "Searching for records" on page 36.

Refreshing data

After you create or modify a record, click Refresh to see the latest changes in the Assigned Work table. The Refresh button is located in the top right corner of the console.

If you have changed the search criteria, you can return to your defaults by clicking Set to Defaults.

Viewing and creating broadcast messages

Use the Broadcast feature, on the lower portion of the console, to view and create messages that can be viewed by the entire organization or by users in the support, approver, management, and administrator groups. For information about using Broadcasts, see "Broadcasting messages" on page 54.

Using the navigation pane

The pane on the left side of the console is the navigation pane.

Changing the console view

The links under Console View help you filter records that appear in the Assigned Work table. For more information about using the Console View functions, see "Using the Assigned Work table" on page 30.

Using console functions

The following links are under the Console Functions heading:

- **Select Status Values**—Lets you see only those records in a certain state, which you specify from the Select Status Values dialog box. See "Selecting status values" on page 35.
- **My Profile**—Lets you set your profile. See "Viewing your profile" on page 35.
- **Application Preferences**—Lets you set your application preferences and options. This function is also available from the Problem Management console, as described in "Setting application preferences" on page 74.

Opening other applications

Use the Other Applications links to open other available ITSM applications. The links that appear under the Other Applications heading are determined by the applications that are installed on your system:

- **Incident Management**—Opens the Incident Management application.
- **Change Management**—Opens the Change Management application.
- **Problem Management**—Opens the Problem Management application.

- **Asset Management**—Opens the Asset Management application.
- **Approval**—Allows you to view all requests pending approval.
- **CMDB**—Opens the BMC Atrium CMDB Class Manager console.
- **USLM**—Opens the Unified Service Level Management application.

Selecting status values

You can use the Select Status Values dialog box to filter the requests that appear in the Overview console based on their status.

▶ To select status values

1 From the navigation pane in the Overview console, choose Console Functions > Select Status Values.

   The Select Status Values dialog box appears.

2 Select the status values for each category from the lists.

3 When you finish selecting the values, click OK.

   The dialog box closes.

4 If the Assigned Work table does not refresh with the filtered records, click Refresh to reload the table's contents.

Viewing your profile

You can view *and* modify your personal profile. When you click My Profile, the People (Search) form appears. In this form, you can:

- Update company information such as organization, business, and home address, and so on.
- View permissions.

For detailed information about the People form, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

▶ To modify your profile

1 From the navigation pane, choose Console Functions > My Profile.

   The People form appears.

2 Update the information at the top of the form, or click the tab corresponding to the area in which you want to change the profile information.

   Make your changes by selecting from the various lists that are available.

3 When you finish making the changes, click Save.

4 Click Close to close the form.

Using quick actions

The Overview console lets you perform certain quick actions. From the Quick Actions list, select the appropriate action, then click Execute.

- **Print**—Lets you select records and print their contents. See "Printing records" on page 40.
- **Home Page**—Opens the Home Page.

Auto-filling fields

As you work with the forms and dialog boxes, you might see a plus sign (+) included in a field label. You can type part of the information next to these fields and press ENTER. If an exact match is located, the system automatically completes the field. If a selection list appears, double-click the item you want to put in the field. Using auto-fill fields and lists is faster, more consistent, and more accurate than typing the information.

Working with records

This section discusses some of the common functions related to record handling.

Searching for records

Two types of searches are available from the main console. One type of search looks only through records that are in some way associated with you through your login ID or group ID (for example, records created by you, assigned to you or to your support group, and so on) and that meet your specific search criteria. You execute this type of search from the Search area near the top of the console. For a description of how to run this type of search, see "Searching your records" on page 37.

Note: You can view the support groups you belong to by clicking the My Profile link in the navigation pane, then opening the Support Groups tab. For more information about this link, see "Viewing your profile" on page 35.

The other type of search looks through all of the records that meet your search criteria, regardless of their associations to people or groups. You run this type of search by using the Search Problem Management link in the navigation pane. For a description of how to run this type of search, see "Searching all records" on page 39.

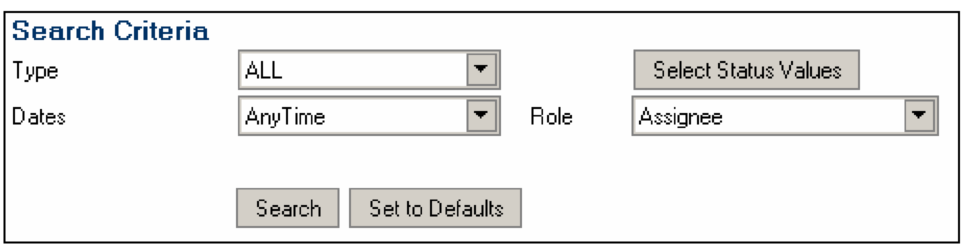
Searching your records

The following procedure describes how to search the database for records associated with you or your group and that meet your specific search criteria. Use this type of search when you are looking for a record that you know is associated with your ID or with your group's ID.

▶ To search records assigned to your group

1 From the Search Criteria area in the Problem Management console, select your search criteria from the various selection boxes.

Figure 2-6: Search Criteria area of the Problem Management console



Note: The most commonly searched-upon record fields appear in the Search Criteria area of the console. More record fields are available as search criteria under the Advanced Search option, as described in "Using the Advanced Search feature" on page 38.

2 Click Search.

The Assigned Work table updates with the results of your search.

3 Scroll through the search results table to find the specific record you want.

Note: If the search returns a large number of records, use the Advanced Search feature to help you narrow the results.

You can also search for another record from within an open record by using the standard BMC Remedy User search function.

Using the Advanced Search feature

If your search returns too broad a range of records, you can perform an advanced search to narrow the results.

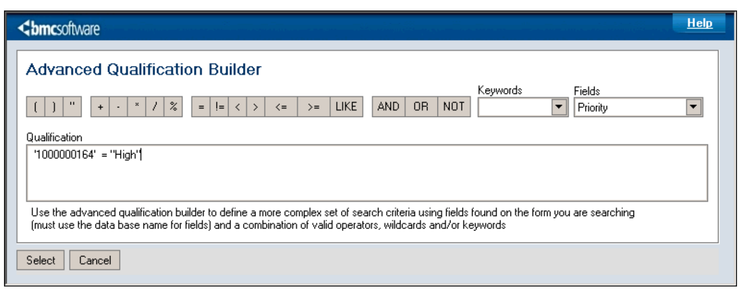
Note: To use the Advanced Search feature, you must select one of the following options from the search criteria Type list: Solution Database, Known Error, or Problem Investigation.

▶ To use the Advanced Search feature

1 From the Problem Management console, click Advanced Search.

The Advance Qualification Builder dialog box appears.

Figure 2-7: Advanced Qualification Builder dialog box



2 From the Keywords or Fields selection boxes, select the keywords or record fields on which you want to search.

Note: When you select a field, the application inserts the field ID. The application requires the field ID to perform advanced searches from the Problem Management console.

To insert operators (+, =, >,<, and so on), click the appropriate operator button. Do not forget to place literal values between quotation marks. For example, to search for an investigation with a priority of "high," you would construct the following search:

'1000000164' = "High"

3 Click Select.

The dialog box closes and you return to the main console.

4 Click Search.

The search results table updates with the results of your search.

Searching all records

Use this type of search when you are looking for a record not associated with your ID or your group's ID, or anytime you need to search all records.

Note: You can search for problem investigations, known errors, or solution entries. The following procedure uses a search for problem investigations as an example.

▶ To search all records

1 From the navigation pane, choose General Functions > Search Problem.

A form appears that allows you to perform the search.

The form is laid out in a similar way to the Problem Investigation form, and contains the same tabs and fields. You can use any of the tabs and fields in the form to specify your search criteria.

2 Using the tabs and fields, build your search condition.

To reduce the number of records found by the search, enter as much information into the form as you can.

3 When you finish entering your search criteria, click Search.

When the search finishes, the search results table lists all of the records that match the search criteria.

4 Scroll through the table to find the specific record you want.

5 When you find the record, open it in the Problem form by double-clicking it in the search results table.

Printing records

You can print a copy of a record to keep for filing purposes or to share with someone who does not have access to the application.

Use this procedure to print a record.

▶ To print a record

1. From the Problem Management console, select the record you want to print.

Note: If you already have the record open and want to print it, click Print at the bottom of the form to open the Business Objects Report Preview dialog box, then go to step 4.

---

2. At the bottom of the console, from the Quick Actions list, select Print, then click Execute.

   The Business Objects Report Preview dialog box appears, allowing you to view the record before you print it.

3. Click the print icon on the menu bar at the top of the dialog box.

   When the print confirmation dialog box appears, click Print to send the record to your local printer.

4. Close the Business Objects dialog box.

Modifying records

After you generate a record, you can modify, or update, the information it contains. Use the following procedure to modify a record.

▶ To modify a record

1. From the Problem Management console, open the problem investigation that you want to modify.
2. Click the tab that contains the information you want to update.
3. Make the appropriate changes.
4. Click Save.

Working with relationships

By defining and maintaining relationships among records, you can create a more sophisticated overview of the connections and interdependencies among the current record and other service issues being tracked by your system.

A problem investigation can be related to any of the following record types:

- Configuration item
- Incident
- Solution Database
- Known error
- Another problem investigation

If you have Asset Management and Change Management, a problem investigation can also be related to the following record types:

- Configuration item (CI) unavailability
- Infrastructure change

A known error can be related to any of the following record types:

- Configuration item
- Incident
- Solution Database
- Another known error
- Problem investigation

If you have Change Management, a known error can also be related to infrastructure change.

Note: Relationships cannot be defined from Solution Database records.

Defining relationships

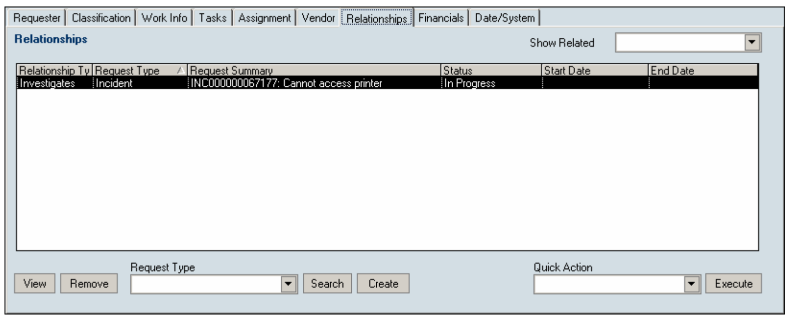
Use the following procedure to define a relationship. The following example uses a problem investigation, but the procedure is similar for defining a relationship from a known error.

▶ To define a relationship

1 From the Problem Management console, open the problem investigation from which you want to define the relationship.

2 Click the Relationships tab.

Figure 2-8: Relationships tab



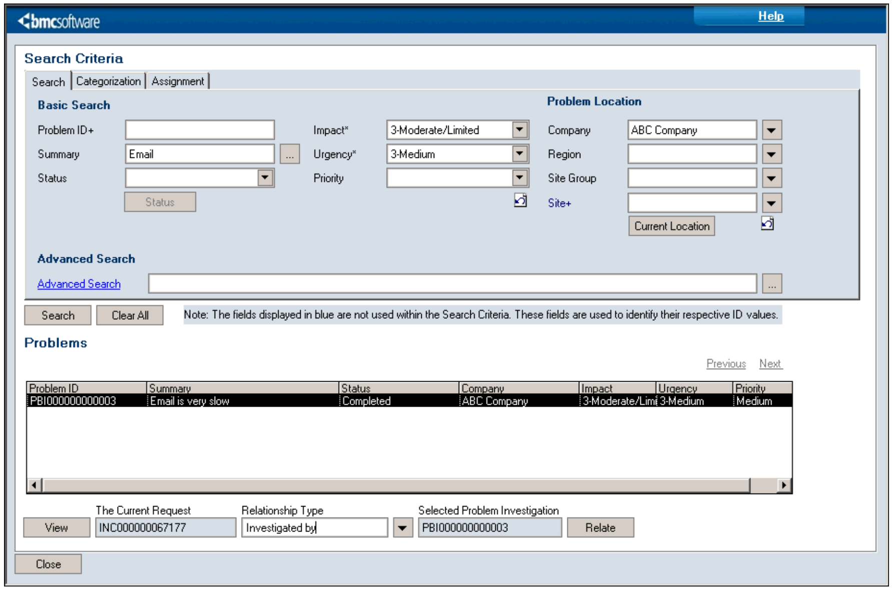
3 From the Record Type list at the bottom of the Relationships tab, select the type of record to which you want to relate the current record.

For example, to relate your problem investigations to a configuration item, select Configuration Item from the Record Type list.

4 Click Relate.

A dialog box appears that allows you to perform a search.

Figure 2-9: Example of Completed relationship search



Note: The content of the dialog box depends on the type of record you chose in the Record Type list.

---

5 Complete the search criteria tabs with the relevant information, then click Search.

Try to supply as much information as possible in the search dialog box to reduce the overall number of records returned by the search.

The matching results appear in a search results table.

6 From the search results table, select the configuration item with which you want to create the relationship.

7 From the Relationship Type list at the bottom of the search dialog box, select the type of relationship you want to create. For example, if you are relating a problem investigation to a CI that is impacted by the problem, you might select Impacts.

Note: The contents of the Relationship Type list depends on the type of record you are trying to create the relationship with.

---

8 Click Relate.

An information message dialog box from the AR System User appears confirming the relationship.

9 Click OK to dismiss the dialog box. Click Close to close the search dialog box.

The Relationships tab appears with the newly created relationship visible in the Relationships table.

Copying relationships

When you define a relationship between the current record and another record, the other record might also have one or more records related to it. Using the Copy Related Relationships form, which you open from the Relationships tab, you can look at the related record's other relationships. If you determine that any of these other relationships should be related to the current record, you can define the relationship from this form.

By doing this, you can more thoroughly document all of the record relationships.

Note: You cannot use this procedure to copy related CIs.

▶ To copy relationships

1 From the Problem Management console, open a problem investigation.

2 Click the Relationships tab.

3 In the Relationships table, select a record related to the current problem investigation.

4 From the Quick Actions list, select Get Related Relationships, then click Execute.

The Copy Related Relationships form appears. This form contains a table of records related to the record you selected in step 3.

5 From the table of related records, select the other record that you want to relate to the current record.

Note: To see a detailed description of the other record, select it, then click View. A form appears with detailed information about the selected record. Use this feature to help you determine whether you want to relate the other record to the current record.

6 Click inside the Relationship Type field.

A list of relationship types appears.

Note: The contents of the Relationship Type list depends on the type of record you are trying to create the relationship with.

7 Select the type of relationship you want to create, then click Select.

A note appears confirming the relationship creation. Click OK to dismiss the note.

8 Close the Copy Related Relationships form.

The newly created relationship appears in the Relationships table.

Indicating impacted areas

The Impacted Areas form gives you a place to show the department, site, location, and so on, that are affected by the content of the record.

Use the following procedure to indicate the impacted areas.

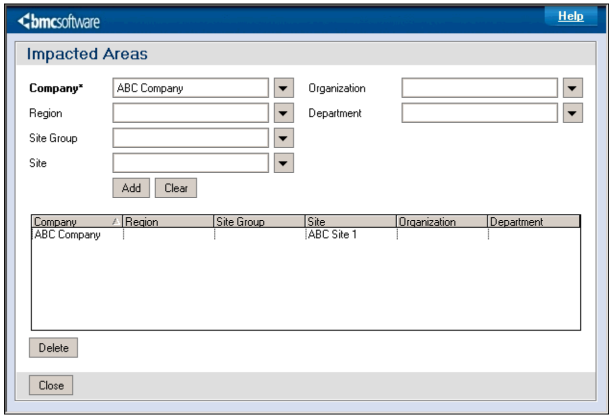
▶ To indicate an impacted area

1 From the Problem Management console, open the problem investigation for which you want to indicate an impacted area.

2 From the navigation pane, choose Quick Links group > Impacted Areas.

The Impacted Areas form appears.

Figure 2-10: Impacted Areas dialog box



3 Click View.

The Impacted Areas Update dialog box appears.

4 Select items from the various lists that help to describe the impacted area appropriate for the investigation you are working on, for example, Company, Region, and so on.

For example, Company, Region, and so on.

Note: Required fields are marked with an asterisk.

---

5 Click Add.

You can add as many impacted areas as necessary. You can also delete areas that you have previously chosen in this form.

6 When you are finished indicating the impacted areas, click Close.

Modifying relationships

After you define a relationship, you change the relationship type and update the relationship description.

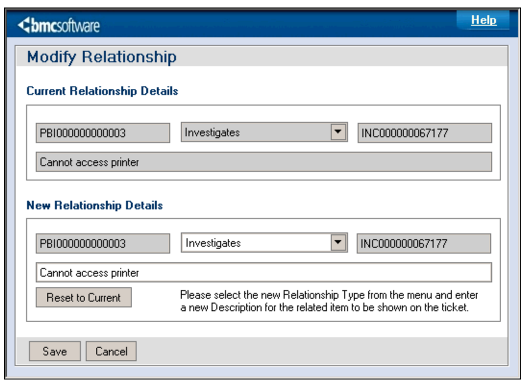
Use the following procedure to modify the relationship.

To modify a relationship

1. From the Problem Management console, open the problem investigation that has the relationship you want to modify.
2. Click the Relationships tab.
3. In the Relationships table, select the relationship you want to modify.
4. From the Quick Actions list, select Modify Relationship Type, then click Execute.

   The Modify Relationship dialog box appears.

Figure 2-11: Modify Relationship dialog box



5. On the Modify Relationships Type form, enter the new relationship details according to the on-screen instructions.
6. Click Save to save your changes.

Performing quick actions on a relationship

You can perform many other actions on a relationship. For a list of these actions, see Table 2-1 or Table 2-2.

▶ To perform a quick action

1. From the Problem Management console, select a problem investigation.
2. Click the Relationships tab.
3. In the relationships table, select the relationship entry for which you want to perform the action.
4. From the Quick Actions list, select the action you want to perform, such as Get Impacted Areas.

   The following table lists available quick actions for any related item.

Table 2-1: Effects of general relationship actions

Relationship action	Effect
Get Related Relationships	Copies the relationships of the selected record to the current incident's relationships.
Modify Relationship Type	Prompts you to modify the relationship type, as described in "Modifying relationships" on page 47.

Additional quick actions are available when you select a related configuration item, as indicated in the following table.

Table 2-2: Effects of relationship actions for related CIs

Relationship action	Effect
CI Viewer	Opens a graphical relationship viewer that shows a selected CI's relationship with other records.
Create New CI Unavailability	If Asset Management is installed, you can create CI unavailability for the selected CI.
Get CI Impact/Urgency	Copies the impact and urgency of the selected CI.

Table 2-2: Effects of relationship actions for related CIs

Relationship action	Effect
Get CI Product Categorization	Copies the product categorization from the selected CI to the classification of the current incident.
Get CI Resolution Product Cat.	Copies the product categorization from the selected CI to the resolution of the current incident.
Get Impacted Areas	Prompts you to select impacted areas, as defined in the selected CI, into the current investigation's impacted areas.

5 Click Execute.

Removing relationships

Use the following procedure to remove a relationship.

▶ To remove a relationship

1. From the Problem Management console, open the problem investigation that contains the relationship you want to remove.
2. Click the Relationships tab.
3. In the Relationships table, select the relationship you want to remove.
4. Click Remove. Click Yes when the system prompts you to confirm the removal.

   The system refreshes the Relationships tab.

Adding work information

Work Info is a new feature that replaces the Notes and Notes log fields from ITSM 6.0. You access this feature from the Work Info tab of the current record.

Use this feature to add work information regarding tasks performed on the current record. For example, you might want to add work information about the following activities:

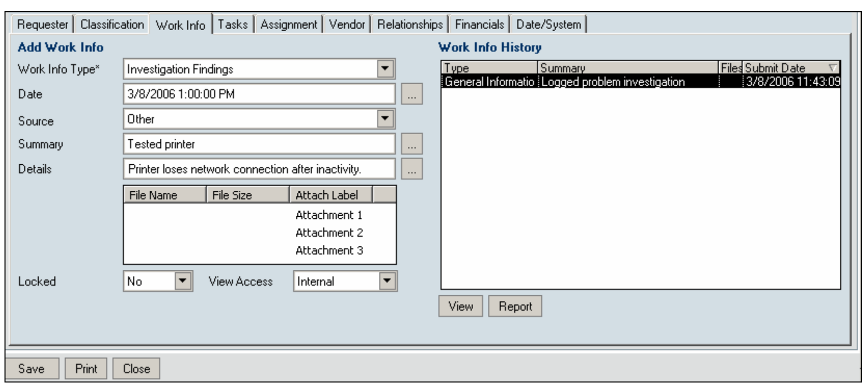
- **General Information**—Notes about the record; for example, you might want to add a note that a particular CI was deployed, and include the date.
- **Vendor communication**—Notes about communication with a vendor, such as a phone call to a vendor.
- **Investigation findings**—Notes about investigations; for example, you might want to attach a report to work information.

These are just some of the options available from the Work Info Type list on the Work Info tab.

▶ To add work information

1. From the Problem Management console, open the problem investigation that you want to add the work information to.
2. Click the Work Info tab.

Figure 2-12: Work Info tab



3. From the Work Info Type list, select the type of work information you want to add.

4 From the Source list, select the source of this information.

Information sources can include, for example, email, system assignment, or the Web.

5 Enter the details of your work information record in the Summary and Details fields.

6 To add an attachment to the record, right-click in the attachment table and select Add from the menu that appears.

7 From the Locked list, select Yes or No to lock the log.

Important: If you select Yes, you cannot modify the work log after you save it.

8 From the View Access list, select Internal or Public.

- **Internal**—If you want users within your organization to see the entry.
- **Public**—If you want everyone with access to the system to see the entry, including requesters.

9 Click Add to Work Info History.

10 To see a report of selected work information entries, select one or more entries, and click Report.

Creating reminders

Use reminders to create notes for yourself and others. You can send the reminders by email or by BMC Remedy Alert, and can specify when they will be sent. You can create generic reminders, or you can create reminders that are associated with a specific request.

For example, you can send yourself a note about a specific investigation to remind yourself to follow up on it.

You can create and view reminders from either the Problem Management console or from within a specific investigation, known error, or Solution Database entry. The location from which you create or view a reminder determines which reminders you see:

- **Problem Management console**—You can view all reminders that you created.

- **Problem Investigation form**—You can view all reminders associated with that investigation. This includes reminders created by other users of Problem Management.
- **Known Error form**—You can view all reminders associated with that known error. This includes reminders created by other users of Problem Management.
- **Solution Database form**—You can view all reminders associated with that Solution Database entry. This includes reminders created by other users of Problem Management.

To create a reminder

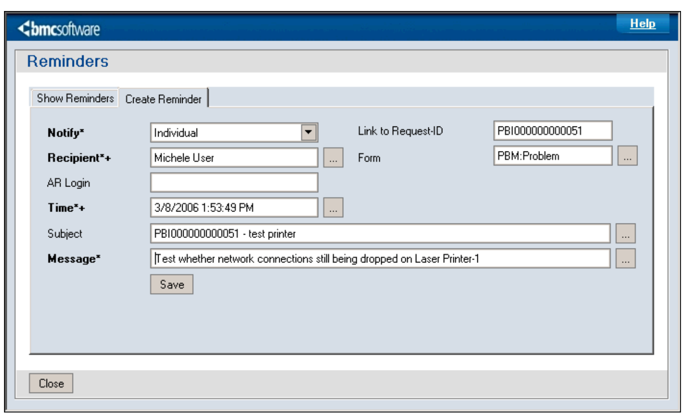
1 To open the Reminders dialog box, do either of the following steps:

- From the navigation pane in the Problem Management console, choose General Functions > Reminders.
- From the navigation pane of the Problem Investigation, Solution Database, or Known Error form, choose Functions > Reminders.

Note: If you create a reminder from the application's main console, the reminder is general in nature. If you open a record and create a reminder, the reminder is specific to the open record.

2 Click the Create Reminder tab.

Figure 2-13: Completed Create Reminder tab

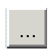


Note: If you are creating the reminder from the main console, skip the next step.

3 To remove the link between the reminder you are creating and the open record, select, then delete the contents of the Link to Request-ID field. The Request-ID and Form fields are populated automatically by the system. The Request-ID field links the reminder to the open record.

4 From the Notify list, select either Individual or Group, depending on whether you are sending the reminder to a single person, or a group of people.

5 In the Recipient field, type the name of the person or group to whom you want to send the reminder.



If you need more space to type the entry, click the Browse button next to the field. A larger text entry box appears.

If you type a person's name and press ENTER, the system automatically populates the AR Login field. If the system discovers multiple matches with the name you entered, another dialog box appears that allows you to specify which of the matching names you want to receive the reminder.

6 In the Time field, enter the date and time you want the system to send the reminder.

You can type the information directly into the field, or you can click the button next to the field and select the date and time from the calendar that appears. By default, the Time field contains the current date and time.

7 In the Subject field, enter information about the reminder.

If you need more space to type the entry, click the Browse button next to the field. A larger text entry box appears.

The information in this field appears in the subject line if the reminder is sent by email.

8 In the Message field, type the reminder message text.

If you need more space to type the entry, click the Browse button next to the field. A larger text entry box appears.

Note: Do not type text in the Log field. This field records the subject line and message of the reminder when it is sent.

9 Click Save.

A confirmation message appears.

10 Click Close to close the Reminders dialog box.

The reminder is sent at the time you specified.

Broadcasting messages

This feature lets you send messages to your entire organization, selected groups within the organization, and to external customers as well. You can use this feature to send messages about work in progress, system status, planned work, and so on. You can also use this feature to view messages that were broadcast to you from other groups in your organization.

Creating broadcast messages

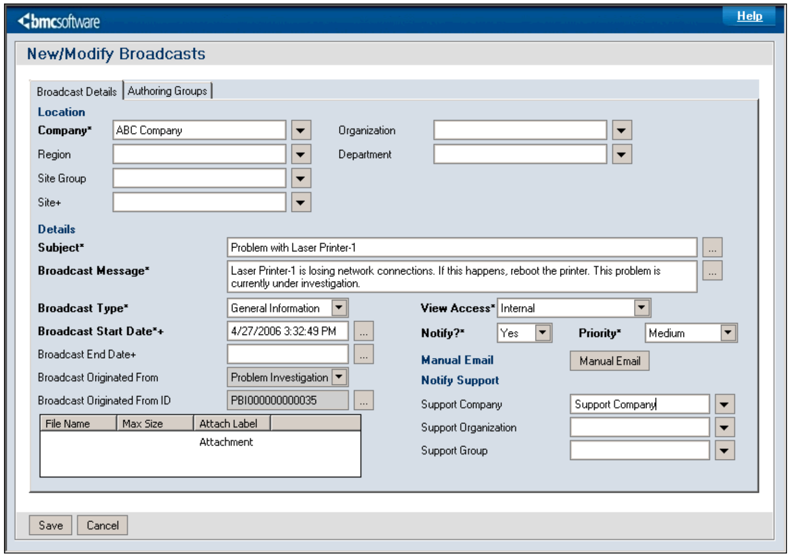
This section describes how to create a broadcast message using the New/Modify dialog box. To create a broadcast, you must have the functional role of Broadcast Submitter. See the *BMC Remedy IT Service Management 7.0 Configuration Guide* for details.

▶ To create a broadcast message

1 You can open the New/Modify Broadcast dialog box from two locations, as follows:

- From the Problem Management console, click Create, which appears below the Broadcast table. If you create a broadcast from the main console, it is not related to a specific record.
- From a problem investigation, from the navigation pane, choose Functions > Broadcast Problem. If you create a broadcast from an investigation, a relationship is created between the broadcast and the investigation.

Figure 2-14: Completed New/Modify Broadcasts form



2 Enter information in the required fields.

Required fields appear in bold on the Broadcast Details tab.

- **Company**—Select the company this broadcast pertains. Only users with access to this company will see the broadcast. If you select Global from the Company list, the broadcast is sent to everyone.

  The Company field is mandatory. If you complete the other location fields, however, you can indicate a very specific part of the company. For example, you can specify the site, organization, or department.

- **Subject**—A short description of what the broadcast is about.
- **Broadcast Message**—The text of your message.
- **Broadcast Type**—Select a broadcast type from the list.
- **Broadcast Start Date** and **Broadcast End Date**—To start the broadcast now, click in the Broadcast Start Date field, and press ENTER. To select a date from the calendar, click the Browse button next to the field, then use the calendar that appears to select the date on which the broadcast is to start and the date on which you want it to end. You can also specify times of the day using the Time feature at the bottom of the calendar.

- **Broadcast Originated From**—This field is completed by the system. The contents depend on where you are creating the broadcast. If you broadcast from an investigation, this is set to Problem Investigation.
- **Broadcast Originated From ID**—This field is populated by the system, but only when you create a broadcast from within a record. If you create a broadcast from the main console, the field appears disabled.
- **View Access**—Select Internal if you want only the broadcast visible to members of your organization. Select Public if you also want the broadcast visible from the Requester console.
- **Notify**—Select Yes if you want a broadcast notification automatically sent to an individual or group.

  If you select Yes, an Email button and the Notify Support area appears.

  - Use the Manual Email button to manually send an email about the broadcast to a person or group. When the Email System form appears, enter the recipient's email address in the Internet Email field, then click Send Email Now.
  - Use the Notify Support area to indicate which group you want to notify of the broadcast. You must complete all three fields, Support Company, Support Organization, and Support Group. The notification is sent at the time and on the date specified in the Broadcast Start Date field.
- **Priority**—Select a priority level for the broadcast. The choices are Low, Medium, and High.

3 To add an attachment to the Broadcast, right-click inside the table and select Add from the menu.

  The Add Attachment dialog box appears. Use this to indicate the file you want to attach. Click Open to attach the indicated file. You are limited to one attachment for each broadcast.

4 If you want members of another group to be able to modify the message, follow these steps:

  a Click the Authoring Groups tab, then click Manage Authoring Groups.

    The Authoring Group dialog box appears.

  b Indicate the group that you want to have authoring rights by selecting from the menus. Click Add when you are finished.

Note: The support group you belong to appears in the table by default.

You can indicate another group, or click Close to dismiss the dialog box.

5 Click Save to save the broadcast message and close the dialog box.

Viewing broadcasts

This section describes how to view broadcast messages. While viewing broadcasts, you can modify the message (if you belong to an authorized authoring group), create a new broadcast message, and under some circumstances (when viewing the message from the current record) relate the broadcast message to the current record.

▶ To view broadcasts

1 You can view broadcast messages from two locations, as follows:

- From the Problem Management console, select the message you want to view from the Broadcast table, then click View.
- From the current record, in the navigation pane, choose Quick Links > View Broadcasts. The View Broadcasts dialog box appears. Select the message you want to view from the Broadcast table, then click View.

Note: When viewing broadcast messages from the current record, you are looking at all of the broadcast messages, not just the ones related to the current record. If the broadcast table contains a large number of messages, use the Broadcast Search Criteria tab to limit the number of messages. For information about how to do this, see "Limiting the number of messages" on page 58.

2 To view another message, do either of the following steps:

- When viewing from the main console, close the View Broadcasts dialog box, select the broadcast message you want to view from the table, then click View.
- When viewing from the current record, in the broadcast messages table, click the message you want to view. The message details appear.

Creating or modifying a broadcast message

To create or modify a broadcast message from the View Broadcasts dialog box, click either Create or Modify. Both actions open the New/Modify Broadcast dialog box.

- If you are creating a new message, follow the instructions provided in "Creating broadcast messages" on page 54.
- If you are modifying the message, edit the fields according to the changes you want to make. Click Save when you finish making your changes.

Limiting the number of messages

When viewing broadcast messages from the current record, you can limit the number of messages that appear in the Broadcast table by opening the Broadcast Search Criteria tab and defining a set of criteria that filters out messages that do not match.

▶ To limit the number of messages

1. Click the Broadcast Search Criteria tab.

   This tab contains search fields where you can specify criteria to reduce the number of broadcast messages displayed in the table.

2. Complete the fields in the tab.

   To return the smallest number of broadcast messages, complete as many of the fields as possible.

3. When you finish specifying the search criteria, click Search.

Sending pages and email messages

Problem Management gives you two methods of sending messages to either individuals or organizations:

- Pages
- Email

This section describes how to send both types of messages manually.

Note: Notification messages to individuals, based on ticket assignments and other events, can be sent by the application as pages or emails. For information about configuring notification to be sent as pager or email messages, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

Paging a person or on-call group

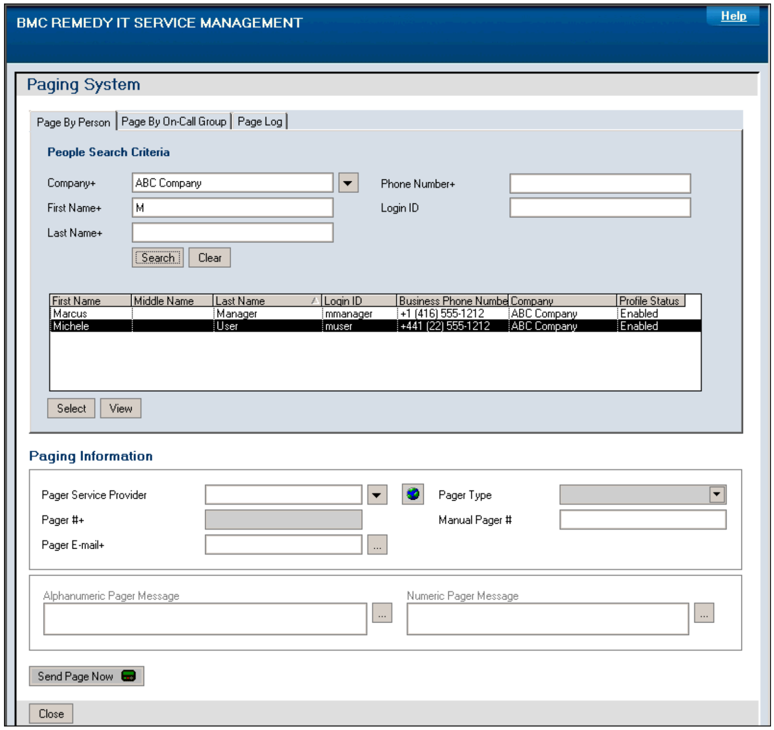
You can page individuals or the on-call member of a group about the current record using the Problem Management Paging System feature.

▶ To page a person or an on-call group

1. Open the investigation from which you want to send the page.
2. In the navigation pane, choose Functions > Paging System.

   The Paging System dialog box appears.

Figure 2-15: Paging System dialog box



3 Select either:

- **Page By Person**—To page an individual.
- **Page By On-Call Group**—To page the on-call member of a specified group.

4 Select the recipient.

To do this, complete the fields in the Search Criteria area, then click Search. When the search finishes, click the recipient's name in the search results table, then click Select.

If you are sending a page to a person (instead of an on-call group) and need help determining the correct person, you can see more information about an individual by selecting their name from the list, then clicking View. This opens the People form, which contains detailed information about the recipient.

5 Complete the fields in the Paging Information area, as follows, then click Send Page Now.

- **Pager Service Provider**—Select the recipient's pager service provider from the list.

  If you are sending a page to a person, you can find this information by selecting the person's name from the search results list, then clicking View (as described in step 4). When the People form appears, click the Notifications tab and look for the Pager Service Provider field.

Note: To learn more about the service provider, click the button with the globe icon beside the field to open a link that takes you to the service provider's website.

- **Pager Type**—The system populates this field automatically, using information about the recipient already in the system.
- **Pager Number**—The system auto-populates this field with the pager's telephone number, when possible. If the pager number is unavailable to the system, you must enter the pager number manually. See Manual Pager Number.
- **Pager Email**—If the pager has an email address, type it here. If you are sending the page to a person, this information is available on the Notifications tab, as described previously.
- **Manual Pager Number**—If the pager's telephone number is not available automatically from the paging system, type the pager's telephone number here.
- **Alphanumeric Pager Message** or **Numeric Pager Message**—Type your message in this field. Be aware that only one of these fields is enabled, depending on the type of pager the recipient carries.

Sending email

You can send messages about the current record using the Problem Management Email System.

You can use this function to send email to any valid email address. This might include an SMS recipient or wireless PDA user, if you can send email to the device.

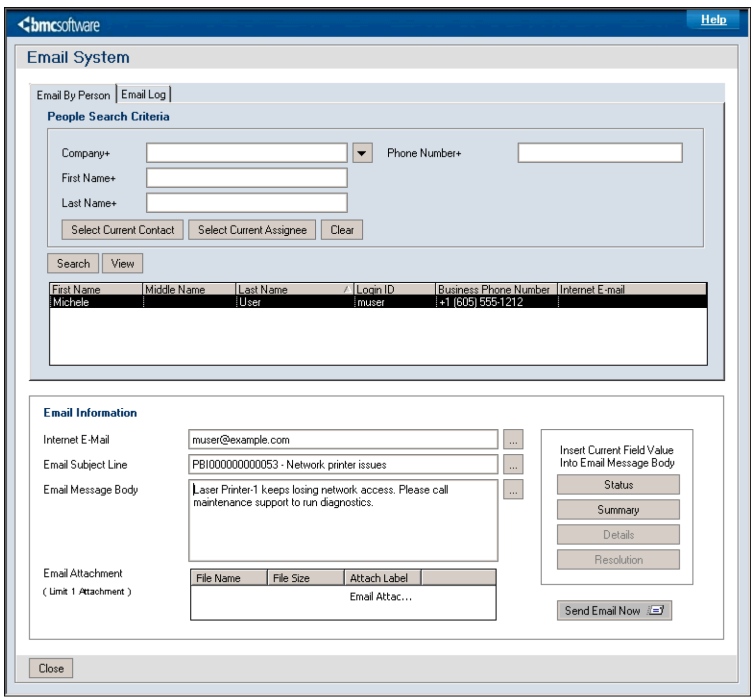
▶ To send an email message

1 Open the investigation from which you want to send the email.

2 From the navigation pane, choose Functions > Email System.

The Email System dialog box appears.

Figure 2-16: Completed Email System dialog box



3 Indicate the recipient by selecting one of the following options:

- **Current Contact**—When you open the Email System form, if there is a current contact assigned to the record, the contact’s name with contact information appears in the table and is the default recipient.

- **Current Assignee**—To select the current assignee, click Select Current Assignee. The current assignee's name with contact information appears in the table.

4 To select another recipient, follow these steps:

   a Complete the fields in the People Search Criteria area.

   b Click Search.

   c When the search finishes, select the recipient's name in the search results table.

   If you need help determining the correct name in the list, you can see more information about an individual by selecting their name from the list, then clicking View. This opens the People form, which contains detailed information about the recipient.

5 Complete the email information fields. See the list that follows for a description of the fields.

   - **Internet Email**—This displays the recipient's email address.

     When you select the email recipient, as described in steps 3 and 4, the internet email address updates from the people record.

   - **Email Subject Line**—By default, the subject line contains the investigation ID number, to which you can append text or over-type.

   - **Email Message Body**—You type the message text here. A series of buttons, to the right of the Email Message Body field, lets you automatically insert text from the problem investigation into the message text; these buttons let you insert the following values:

     - Status
     - Summary
     - Details
     - Resolution

Note: If one or more of these buttons appear disabled, it means the corresponding field in the record contains no information.

- **Email Attachment—**You can attach a file to the email message (you are limited to just one attachment). To do this, right-click inside the Email Attachment table, then click Add. The Add Attachment dialog box appears. Navigate to, then select the file you want to attach. Click Open. Details of the attached file appear in the table.

6 Click Send Email Now.

Working with reports

Problem Management provides a variety of predefined reports to give you quick and easy access to information about your system. You use the Report console to generate these reports. If the predefined reports return more information than you need, you can manage the scope of the report using qualifications. For information about using qualifications, see “Using qualifications to generate a report” on page 66.

Important: If you use Crystal Reports software to modify the prepared reports supplied with Problem Management, Customer Support can only provide limited assistance if you should have a reporting problem. In addition, there is no guarantee that problems resulting from these modifications can be solved. The standard reports included with BMC Remedy Service Desk: Problem Management are designed to be used without modification.

Generating a report

Use this procedure to generate a standard report without using qualifications (for information about generating reports with qualifications, see “Using qualifications to generate a report” on page 66).

▶ To generate a report

1 From the navigation pane in the Problem Management console, choose General Functions > Reports.

The Report console appears.

2 From the Report Name list, select the report you want to generate.

Report	Description
Open problem investigations	This lists open problem investigation records grouped by status and Problem Manager group.
Problem investigations by root cause	This lists problem investigations grouped by root cause.
Resolved problem investigations	This lists resolved and closed problem investigation records grouped by status and Problem Manager group.
Open known errors	This lists open known errors, which includes known errors with a status of: assigned, assigned to vendor, no action planned, and scheduled for correction. The listing is grouped by status and Problem Manager group.
Resolved known errors	This lists resolved known errors, which includes known errors with a status of: canceled, closed, and corrected. The listing is grouped by status and Problem Manager group.

3 If you select a report that requires a date range, the date range field appears.

Select a start date and end date for the report.

4 From the Destination list, select one of the following output destinations:

- **Screen**—Your report appears in a separate dialog box.
- **Printer**—The report is sent to the printer you specified in the Print Setup dialog box.
- **File**—The report is saved to the path and file you specify.

5 Click Run Report.

Using qualifications to generate a report

You can manage the scope of a report by adding qualifications to the criteria used by the report engine to generate the report content. You can tell the report to search only certain specified fields for particular values, or build advanced qualifications using field names, keywords, and operators. By saving the qualifications, you can rerun the qualified report without having to re-specify the qualifications.

The following procedure describes how to create basic report qualifications from the Define Report Qualification area of the Report console. To create a report using advanced qualifications, see "Using advanced qualifications to generate a report" on page 67.

▶ To use qualifications to generate a report

1 From the navigation pane in the Problem Management console, choose General Functions > Reports.

The Report console appears.

2 From the Report Name list, select the name of the report you want to generate.

3 In the Define Report Qualification area, create your qualifications from the lists.

For example, to create the qualification
"Cost Center = 001"
select "Cost Center" from the list in the left column, select "=" from the operand list (middle column), then type "001" in the right column.

You can use all five rows in the area to define qualifications.

4 To save the qualification, click Save Qualification.

The Qualification Name dialog box appears.

Note: By saving the qualification, you can rerun this report without defining the qualification again. See "Generating a report using saved qualifications" on page 68.

---

5 In the Qualification Name field, enter a name for your qualification, and click OK.

A message appears stating that your qualification is saved.

6 Click OK.

The Report console reappears.

7 From the Destination list, select one of the following output destinations:

- **Screen**—Your report appears in a separate dialog box.
- **Printer**—The report is sent to the printer you specified in the Print Setup dialog box.
- **File**—The report is saved to the path and file you specify.

8 Click Run Report.

Using advanced qualifications to generate a report

This procedure describes how to generate a report using advanced qualifications.

▶ To generate a report using advanced qualifications

1 From the navigation pane in the Problem Management console, choose General Functions > Reports.

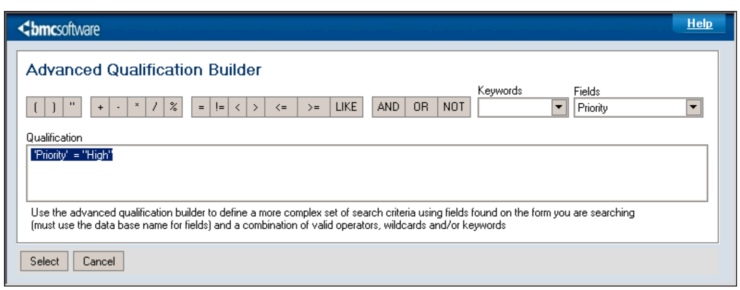
The Report console appears.

2 From the Report Name list, select the name of the report you want to generate.

3 Click Advanced Qualification.

The Advanced Qualification Builder dialog box appears.

Figure 2-17: Advanced Qualification Builder dialog box



4 Using the buttons in the qualification builder, construct your qualification.

5 Click Save.

The Report console reappears.

Note: By saving the qualification, you can rerun this report without defining the qualification again. See “Generating a report using saved qualifications” on page 68.

6 From the Destination list, select one of the following output destinations:

- **Screen**—Your report appears in a separate dialog box.
- **Printer**—The report is sent to the printer you specified in the Print Setup dialog box.
- **File**—The report is saved to the path and file you specify.

7 Click Run Report.

Generating a report using saved qualifications

You can generate a report using qualifications that you created and saved previously.

▶ To generate a report using a saved qualification

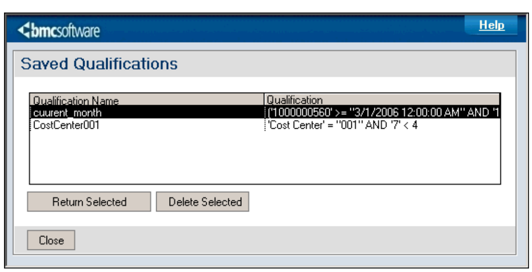
1 From the navigation pane in the Problem Management console, choose General Functions > Reports.

The Report console appears.

2 Click Select Saved Qualification.

The Saved Qualifications dialog box appears.

Figure 2-18: Saved Qualifications dialog box



3 Select the qualification from the table, and click Return Selected.

The Report console reappears.

4. From the Destination list, select one of the following output destinations:
   - **Screen—**Your report appears in a separate dialog box.
   - **Printer—**The report is sent to the printer you specified in the Print Setup dialog box.
   - **File—**The report is saved to the path and file you specify.
5. Click Run Report.

Chapter

3 Working with Problem Management as support staff

This section describes functions of the Support Console tab, which are common to problem investigations, known errors, and Solution Database entries.

The following topics are provided:

Additional functions for support staff are described in the following sections:

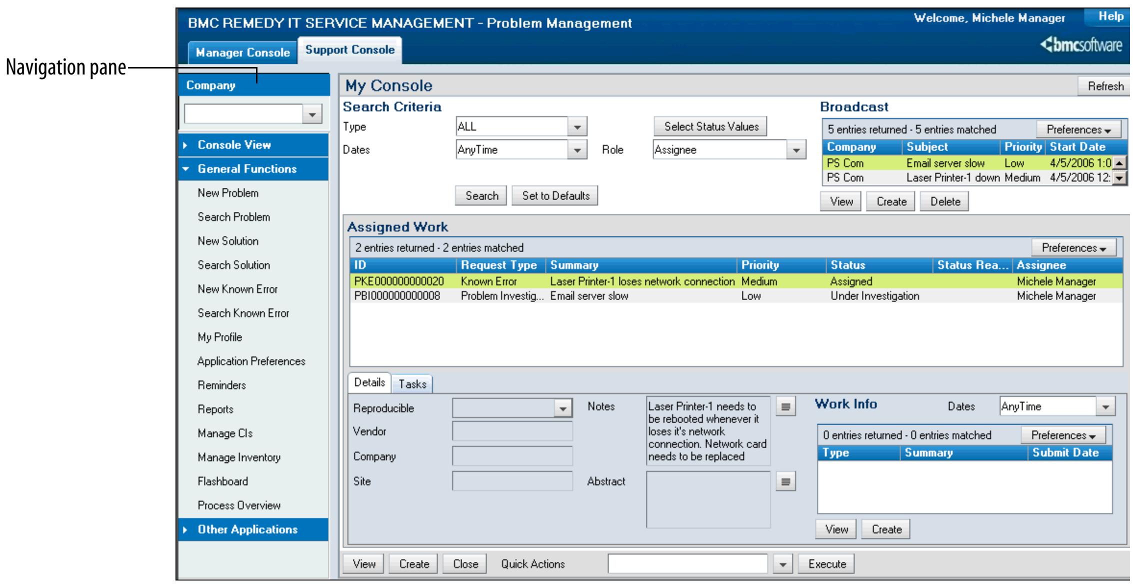
- "Working with problem investigations as support staff" on page 77
- "Working with known errors as support staff" on page 111
- "Working with the Solution Database" on page 121

Understanding the Support Console tab

The Support Console tab has been redesigned for version 7.0. It includes:

- **Navigation pane**—Provides high-level filters, links to functionality, links to other programs.
- **Search Criteria area**—Provides area where you can search for assigned work.
- **Broadcast area**—Displays broadcasts and provides broadcast functionality. For details, see “Broadcasting messages” on page 54.
- **Assigned Work area**—Displays a summary of assigned problem investigations, known errors, and Solution Database entries.

Figure 3-1: Problem Management console—Support Console tab



Both the navigation pane and the Search Criteria area provide options to filter the assigned work displayed on the console, as summarized in the following table.

Table 3-1: Options to filter display of assigned work

Option	Explanation
Company	If you support multiple companies, leave this blank to display work for all companies, or select the appropriate company.
Console View	From this menu, you can select options to look at the personal view for work assigned to you, or to view work assigned to your support groups.
Type	You might want to view only Solution Database entries, known errors, or problem investigations.
Dates	You can view open assigned tickets that were opened any time. You can also restrict the display to tickets opened within the selected time, such as within the last 24 hours.
Role	Problem managers can select either the problem manager or Assignee role.
Select Status Values	This allows you to filter displayed problem investigations, known errors, and solution entries by status value. If you do not change these settings, open problem investigations, open known errors, and active solution entries are displayed. You can select instead, for example, to display completed problem investigations and inactive solution entries.

Setting application preferences

You can set preferences to:

- Set defaults for the consoles.
- Determine the action that occurs after you save an Investigation, Known Error, or Solution Database form.

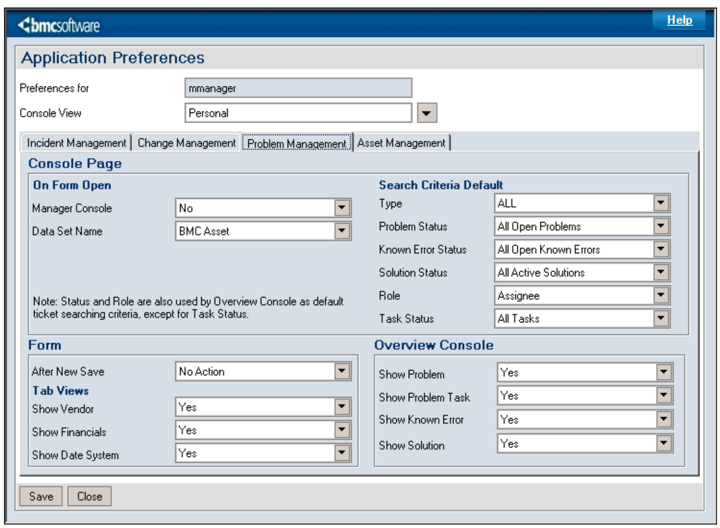
▶ To set your preferences

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 From the navigation pane, choose General Functions > Application Preferences.

The Application Preferences form appears.

Figure 3-2: Application Preferences form—Problem Management tab



3 Update the form as appropriate.

The following table describes the settings available on the form.

Setting	Description
Console View	The default console view, in conjunction with the search criteria, controls which problem investigations, known errors, and solution entries appear in the Assigned Work area. You can temporarily change this setting from the navigation pane of the console. The following selections are available from this list: ■ **Personal**—Displays work assigned to you. ■ **Selected Groups**—Prompts you to select any support groups to which you belong. You can select to display all work assigned to your group, or work assigned to your group that is not yet assigned to an individual. ■ **All My Groups**—Displays work assigned to all of your work groups. You can select to display all work, or investigations that are not yet assigned to an individual.
Manager Console	If you select Yes, when you open the Problem Management console, it opens to the Manager Console tab. Otherwise, it opens to the Support Console tab.
Data Set Name	If there are multiple data sets, such as production and sandbox data sets, select the appropriate data set. (If your system is configured with a sandbox data set, CI data goes first into the sandbox data set. Then the system uses reconciliation process rules to merge the data into the Production data set.)

Setting	Description
Search Criteria Default	Search criteria, in conjunction with the console view, control which problem investigations, known errors, and solution entries appear in the Assigned Work area. You can temporarily change these settings from the Search Criteria area on the console. You can set the following default values: ■ **Type**—Select whether to display Solution Database entries, known errors, problem investigations, or all of these. ■ **Problem Status**—Select whether to display all investigations, or only open, completed, or closed investigations. ■ **Known Error Status**—Select whether to display all known errors, or only known errors with a status of open, closed, corrected, or no known action. ■ **Solution Status**—Select whether to display all solution entries, or only solution entries with a status of inactive or active. ■ **Role**—Select whether to display work when you are the assignee or the problem manager. ■ **Task Status**—This selection controls which tasks are displayed on the Task tab on the console. Select whether to display all tasks, or only those that are open or closed.
After New Save	These settings for problem investigations, known errors, and solution entries control the action after you click Save on the form. The following selections are available from this list: ■ **No Action**—Leaves the form open and it is ready for you to record a new investigation, known error, or solution. ■ **Reopen in New**—Opens the current record in modify mode in a new window. The original window is ready for you to record a new investigation, known error, or solution. ■ **Reopen in Current**—Leaves the form open. If this is a new record, the form changes from New to Modify.
Tab Views	You can choose whether to show the Vendor, Financials, and Date System tabs.
Overview Console	Select whether to show problem investigations, problem tasks, known errors, or solution entries on the Overview console. For information about the Overview console, see "Working with the Overview console" on page 29.

4 Click Save.

Chapter

4 Working with problem investigations as support staff

This section describes functions that are available to support staff to work with problem investigations. Managers can also perform these functions from the Support Console tab.

The following topics are provided:

Identifying and recording a problem investigation

Some problem investigations are initiated through Incident Management. Additional problems can be identified and recorded in Problem Management.

You can identify potential problems to investigate by:

- Searching incidents by a specific CI, categorization, or company to identify trends regarding recurring incidents.
- Analyzing the IT infrastructure to identify a problem that could potentially lead to incidents, such as disk space getting low on a server.
- Looking at capacity management or availability management for potential problems.

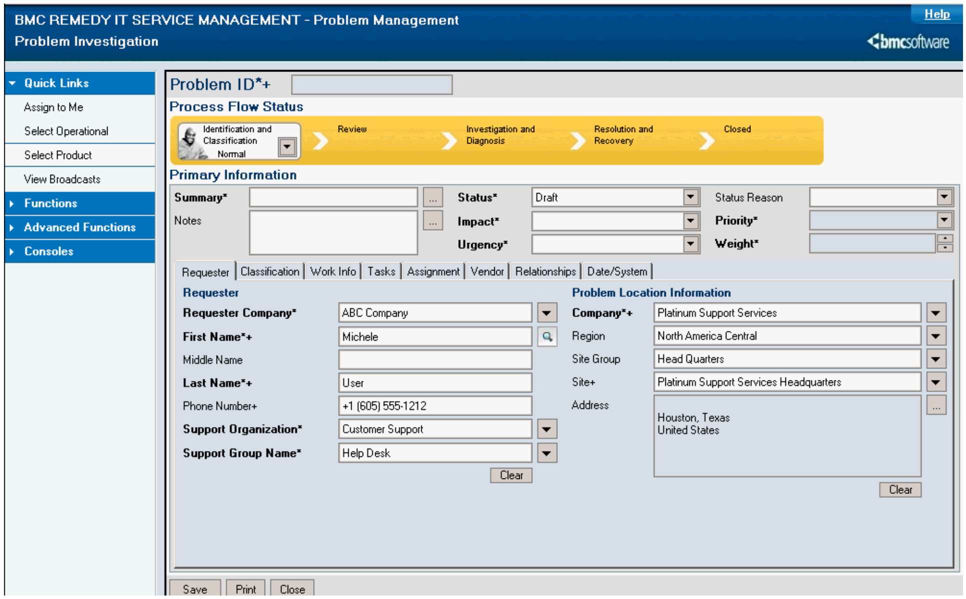
Note: When you record a problem that is related to one or more incidents, you should record the relationship, as described in “Working with relationships” on page 41.

▶ To record a problem investigation

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. From the navigation pane, choose General Functions > New Problem.

   The Problem Investigation form appears.

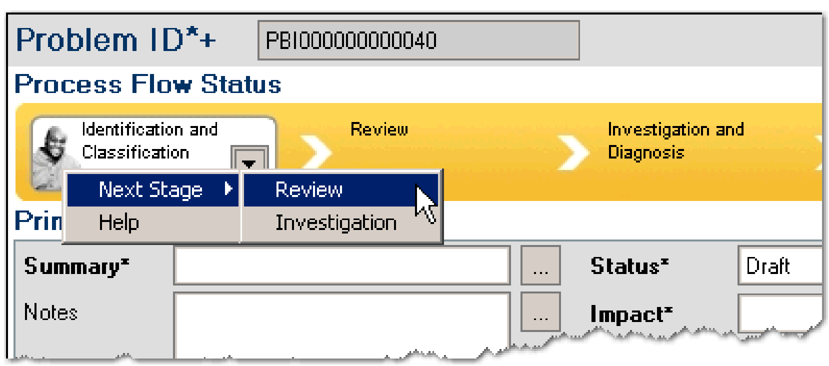
Figure 4-1: Problem Investigation form



3 In the Process Flow Status area, from the accelerator in the Identification and Classification box, choose Next Stage > Review.

If you are a problem manager, you can move directly to the Investigation and Diagnosis stage by choosing that stage from the accelerator.

Figure 4-2: Selecting the next stage from the Process Flow Status wizard

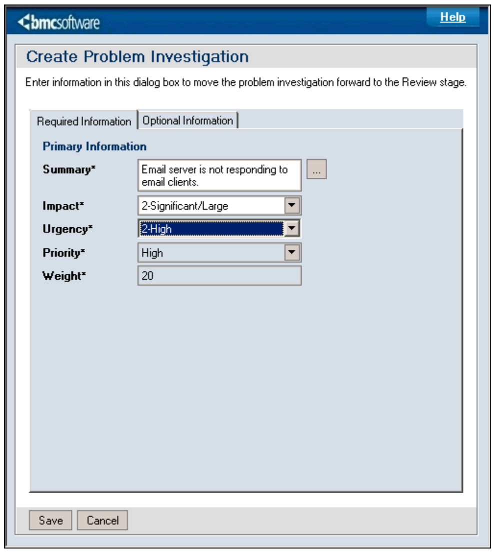


The Create Problem Investigation form appears. The two tabs on this dialog box prompt you to enter required and recommended information.

This is a dynamic dialog box. The fields displayed on the Required and Optional tabs depend on the required and recommended information required to move from the current stage or state to the selected stage or state.

The Process Flow Status wizard provides one method of recording and updating problem investigations. All fields displayed in the dialog box are also available on the Problem Investigation form. You can complete these fields directly from the form, if you prefer.

Figure 4-3: Completed Create Problem Investigation form—Required



4 Type a description of the problem in the Summary field.

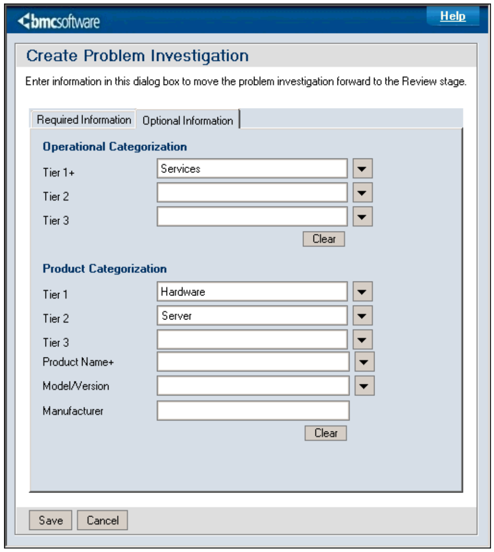
5 Select the appropriate values for impact and urgency. The values for priority and weight are calculated based on your selections for impact and urgency.

- **Impact**—Reflects the extent to which the problem affects the business, which might be related to the extent to which service has degraded from agreed service levels. Impact can be measured by the number of people affected, the criticality of the system affected, and the loss of revenue as a result of the service degradation or disruption.
- **Urgency**—Reflects how quickly a problem must be resolved, or the time available to reduce the impact of the problem on the business.

6 To enter optional recommended information:

a Click the Optional Information tab.

Figure 4-4: Create Problem Investigation form—Optional Information tab



b Select the appropriate operational categorization.

Operational categorization is based on a three-tier hierarchy that is defined in the Operational Catalog configuration form.

c Select the appropriate product categorization.

Product categorization is based on a five-tier hierarchy that is defined in your product catalog.

7 Click Save to save your changes and set the status to Under Review.

If Problem Management autoassignment cannot find a match to assign the investigation, you are prompted to assign the investigation.

8 If prompted, click the Assignment tab, and complete it, as described in "Reassigning an investigation" on page 88. Then use the accelerator in the Process Flow Status area to move the investigation to the next stage.

Problem Management sends notification to the problem manager that somebody has requested a problem investigation. The Requester field is set to you, and the problem location is set to your location.

Recording additional investigation information

You can record information about the Problem Investigation form beyond what the Process Flow Status wizard prompts you. The information recorded in the following procedure might be used by the problem manager to determine whether to proceed with the investigation.

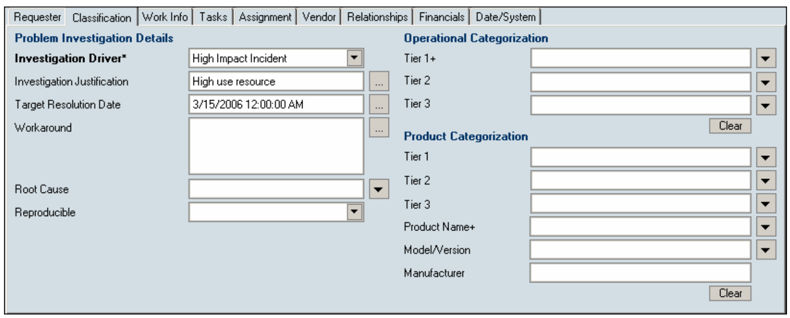
▶ To record additional information about the investigation

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 Click the Classification tab.

Figure 4-5: Classification tab



4 Select an investigation driver.

5 In the Investigation Justification field, type the reason you are requesting the problem investigation.

6 Enter the target resolution date.

7 Click Save.

Indicating impacted areas

Best Practice

When you indicate which areas of the organization are impacted by a problem, the problem manager can determine priorities based on business needs. Areas of the organization can be indicated by location or organizational structure.

To indicate impacted areas

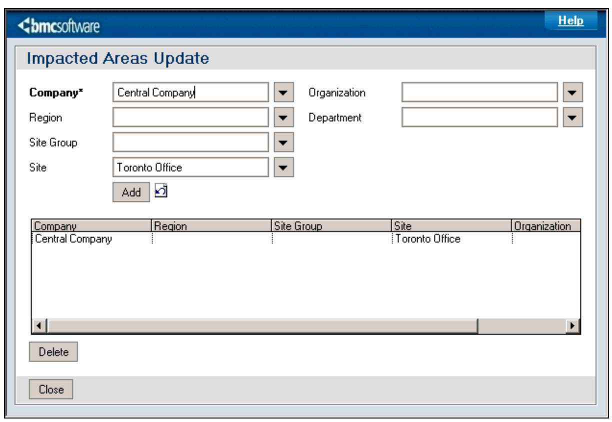
1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 From the navigation pane, choose Advanced Functions > Impacted Areas.

The Impacted Areas Update dialog box appears.

Figure 4-6: Completed Impacted Areas Update dialog box



4 To add an impacted area, select the area, and click Add.

You can add as many impacted areas affected by the problem as necessary. You can also remove areas that you have previously chosen in this form.

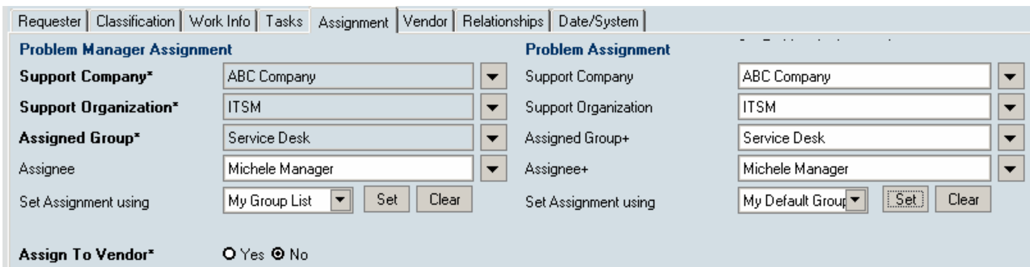
5 When you finish adding areas, click Close.

Understanding assignments

A problem investigation can be assigned to an individual or a group. The assignment tab displays details of the current assignment.

Version 7.0 adds tasks to Problem Management. Tasks can be attached to an investigation and assigned to individuals without changing the assignment of the investigation.

Figure 4-7: Completed Assignment tab



This section includes the following topics:

- "Receiving notification of assignments" on page 85
- "Working with assignments" on page 85
- "Reassigning an investigation" on page 88
- "Working with tasks" on page 89

Receiving notification of assignments

When a problem investigation is assigned to you, you can receive notification through:

- Remedy Alert
- Email

The Problem Management console displays all problem investigations, known errors, and solution entries assigned to you.

Working with assignments

As a problem assignee, you assume responsibility for the problem investigation. You become the focal point for communication about the problem. You are responsible for coordinating activity to investigate the problem.

You can record the effort that you have spent working on an investigation. If you are not assigned to an investigation, you can record that you have assisted with the investigation.

This section includes the following topics:

- "Viewing problem investigations assigned to you" on page 85
- "Accepting an assignment" on page 86
- "Recording effort spent on an investigation" on page 87

Viewing problem investigations assigned to you

You can view the summary and detail of problem investigations assigned to you.

▶ To view problem investigations assigned to you

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 To filter assigned work to display investigations assigned to you, perform the following steps.

  a In the navigation pane, choose Console View > Personal.

  b In the Search Criteria area, set the Type to Problem Investigation.

3 To view additional details about an investigation, perform any of the following actions.

Action	Result
Select the problem investigation.	The Details tab displays the selected investigation.
Select the problem investigation, then click View.	The Problem Investigation form appears. You can modify the form and perform other actions, as appropriate.

4 If you are not accepting the assignment, reassign the investigation, as described in “Reassigning an investigation” on page 88.

Accepting an assignment

You can accept any investigation assigned to your support group.

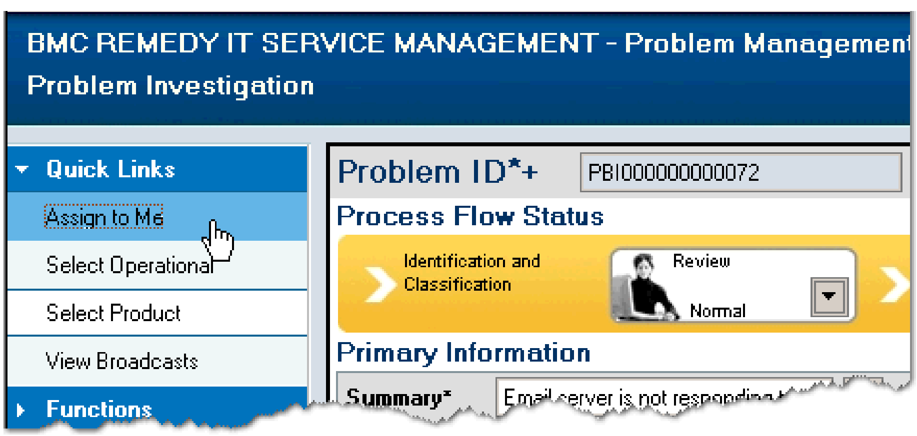
▶ To accept an assignment

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 In the navigation pane, choose Quick Links > Assign to Me.

Figure 4-8: Choosing Quick Links > Assign to Me



4 Click Save.

Recording effort spent on an investigation

You can record time spent working on the investigation. The Effort Time Spent field is an informational field that indicates the total effort time spent on the investigation per session.

To record effort spent on an investigation

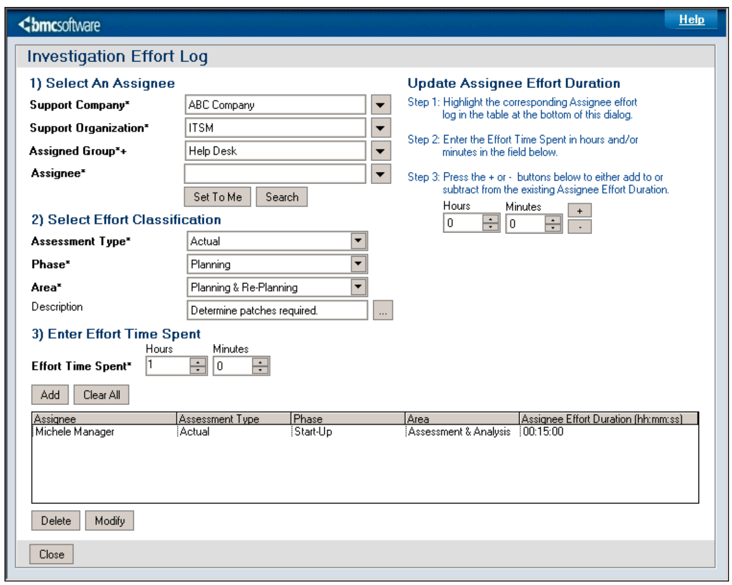
1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 In the navigation pane, choose Advanced Functions > Track Effort.

The Investigation Effort Log dialog box appears.

Figure 4-9: Completed Investigation Effort Log dialog box



4 Complete the dialog box as appropriate.

You can change the assignee effort duration for your own effort logs, but not those of another support group or individual.

5 Click Add to save your total effort time in the effort log.

Note: A completed effort log cannot be deleted, but it can be modified by either the assignee or the problem manager.

Reassigning an investigation

You can reassign an investigation to either an individual or a support group. Use the quick links in the navigation pane to reassign an investigation to yourself (Assign to Me) or to reassign an investigation based on automatic routing (Auto Assign).

▶ To reassign an investigation

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. Open a problem investigation.
3. To assign the investigation to yourself, in the navigation pane, choose Quick Link > Assign to Me.
4. To reassign the investigation based on automatic routing, in the navigation pane, choose Functions > Auto Assign.

   This assigns the investigation based on predefined system mapping. Automated assignment can be based on the problem location, organizational categorization, or product categorization.
5. Otherwise, follow these steps to reassign the investigation.
   a. Click the Assignment tab.
   b. Reassign the investigation.

      You have several options available, as follows:
      - Select the assigned group.
      - After selecting an assigned group, select the assignee.

- Select from Set Assignment using. The following table describes the selections for the problem assignee; different selections are available to select the problem manager.

Set assignment using	Description
My Default Group	Assigns the investigation to you and your default support group.
My Group List	Opens a list of all groups to which you belong. Select the appropriate group from this list.
Favorite Groups	Lists the typical groups to which your support group assigns investigations.
Auto Assign	The same as the Auto Assign link in the navigation pane, this assigns the investigation based on predefined system mapping.

6 Click Save.

Working with tasks

You can assign tasks to one or more people without changing the assignment of the investigation.

Note: You can also create tasks for known errors and Solution Database entries. Working with tasks is the same as described here, except that you open the known error or solution entry, instead of an investigation.

Creating tasks

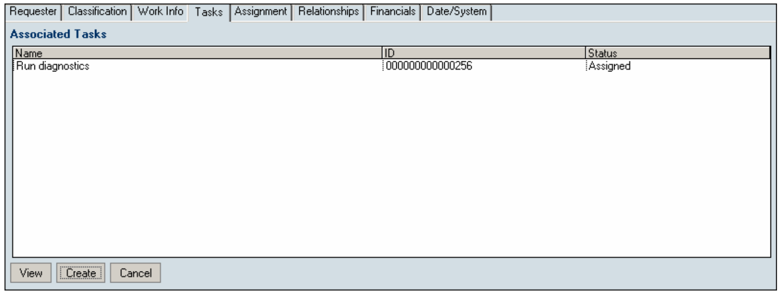
You can create tasks for open investigations, as appropriate.

To create a task

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. Open a problem investigation.
3. Click the Tasks tab.

   The Tasks tab displays tasks associated with the investigation.

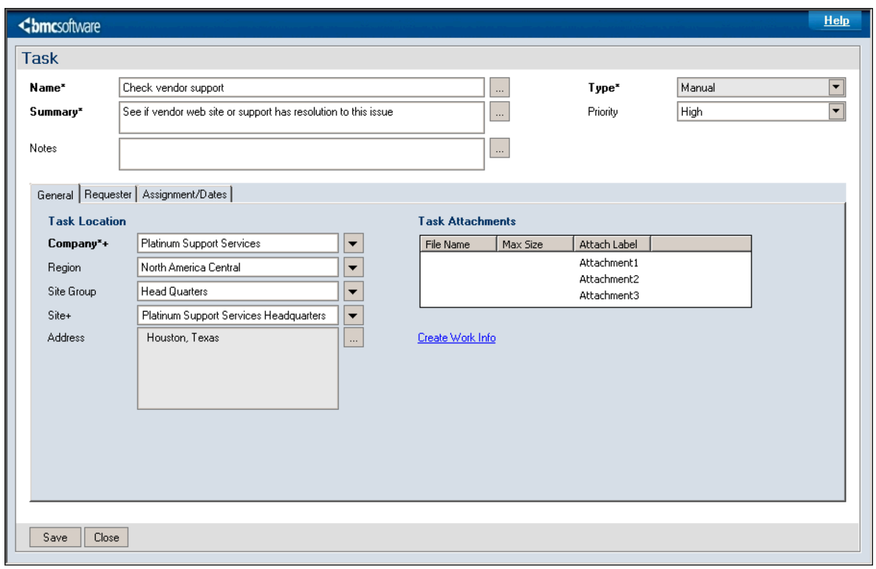
Figure 4-10: Tasks tab



4 Click Create.

The Task form appears.

Figure 4-11: Completed Task form



5 Type a brief description of the task in the Name field.

The task name appears in the summary on the Task tab, as well as in notification messages.

6 Type a detailed summary of the task to be performed in the Summary field.

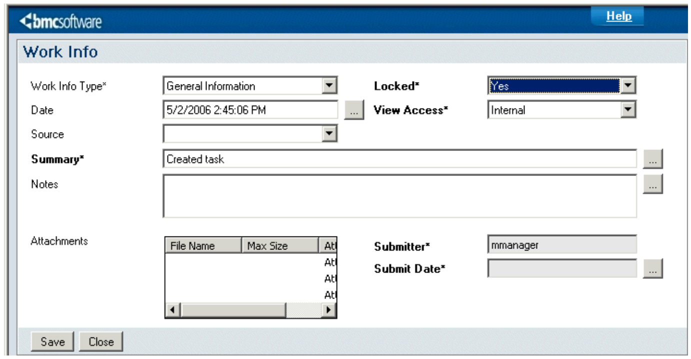
7 Complete other fields on the form, as appropriate.

8 To record work information for this task:

a On the General tab, click Create Work Info.

The Work Info form appears.

Figure 4-12: Completed Work Info form



b Complete the form, as described in "Adding work information" on page 50.

c Click Save.

9 Click Save again.

The task is assigned based on the location and organization. Notification is sent to the task assignee by his or her preferred notification method.

Manually assigning a task

When you save a task, it might be assigned. You can manually set the assignment for any task, if appropriate.

▶ To assign a task

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 Click the Tasks tab.

4 Click Create. The Task form appears.

5 Click the Assignment tab.

When you create the task, the Assignment and Dates tabs are combined as the Assignment/Dates tab.

Figure 4-13: Completed Assignment tab

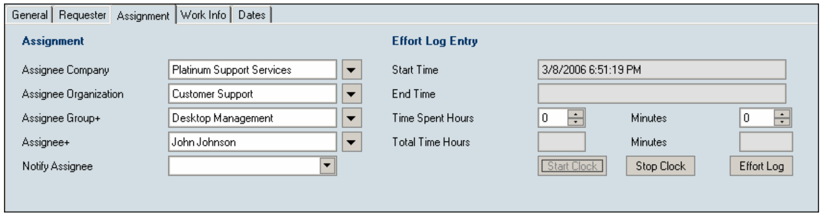
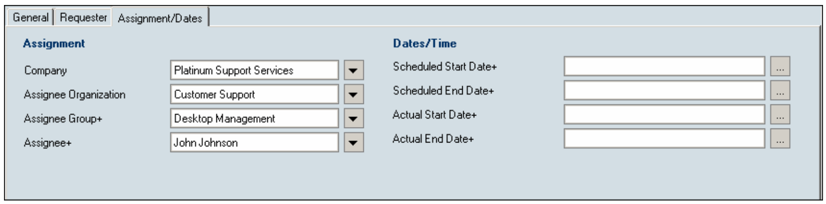


Figure 4-14: Completed Assignment/Dates tab



6 Select the company, organization, assignee group, and assignee.

7 You can schedule the start and end dates on the Dates tab.

8 Click Save.

Recording work performed on tasks

You might be assigned tasks to perform for investigations not assigned to you. When a task is assigned to you, notification is sent to you by your preferred notification method. In addition, it appears on the Overview console in the list of assigned work.

▶ To record work performed on a task

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

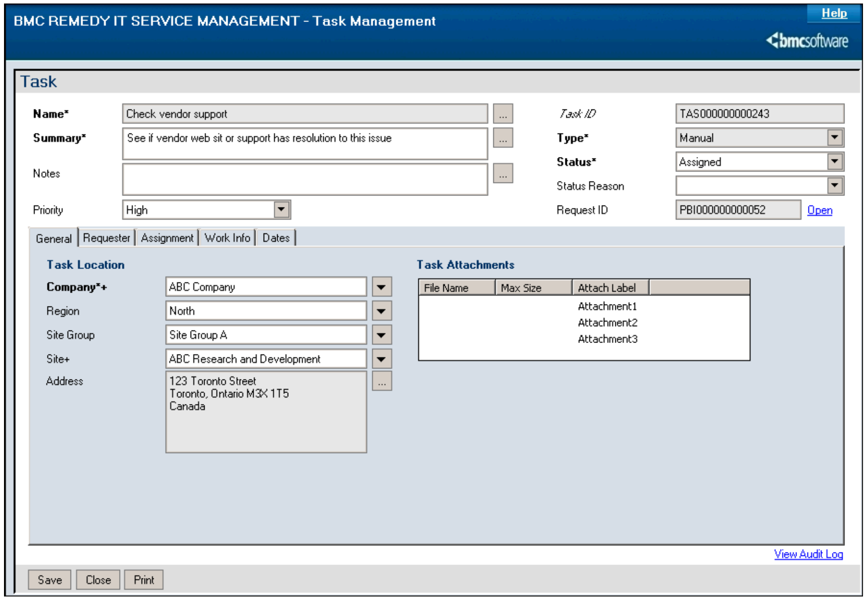
3 Click the Tasks tab.

4 Select the appropriate task.

5 Click View.

The Tasks form appears.

Figure 4-15: Assigned task on Task form



6 Select the appropriate status.

Tasks can be staged, pending, assigned, work in progress, waiting, closed, or bypassed.

Note: The waiting status is used only for automatic tasks, which are not applicable to problem management.

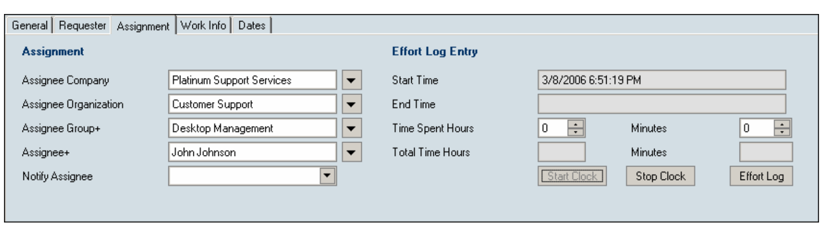
---

7 Select the appropriate status reason.

If you close the task, you must select whether you are canceling the task or completing it as a success or failure.

8 Click the Assignment tab.

Figure 4-16: Tracking effort on the Assignment tab



9 To track effort spent on the task:
   - When you start working on the task, click Start Clock.
   - When you stop working on the task, click Stop Clock.
   - To record additional details about the effort, to manually record time spent working on a task, or to view details of past effort, click Effort Log. The Task Effort Log dialog box appears. Close the dialog box when you are finished.

10 Click the Work Info tab.

11 Complete the Work Info tab, as described in "Adding work information" on page 50.

12 Click Save.

Investigating and diagnosing a problem investigation

This activity takes place after the problem manager has determined that the requested problem investigation is justified and has moved the investigation into the "Investigation and Diagnosis" stage. You attempt to identify the root cause of the problem. You also attempt to find either a permanent solution or a temporary work-around.

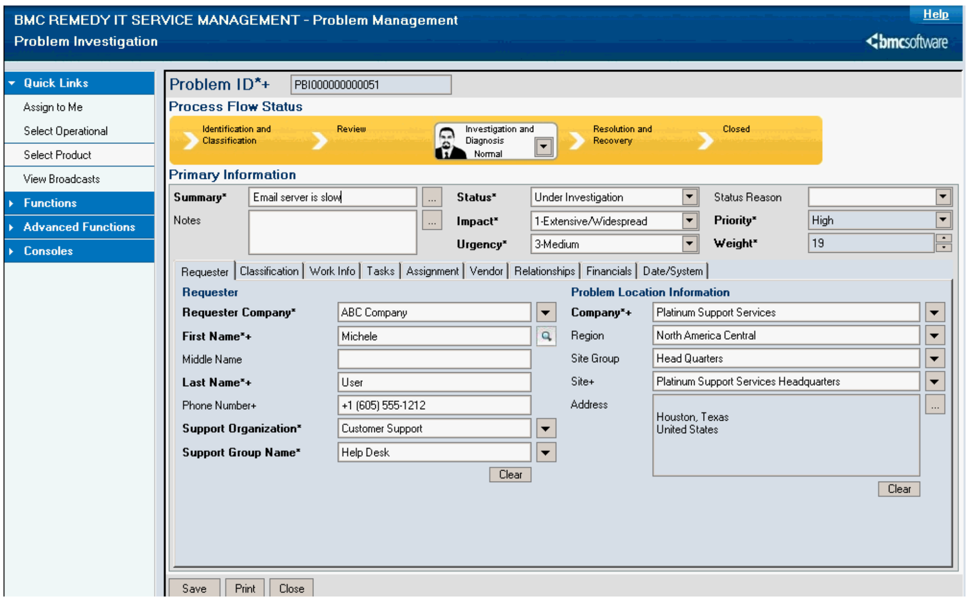
The following topics describe work you might perform while investigating and diagnosing a problem investigation:

- "Viewing a problem investigation" on page 95
- "Adding work information" on page 50
- "Indicating impacted areas" on page 83
- "Documenting work with a vendor" on page 96
- "Recording the root cause" on page 97
- "Recording a work-around" on page 98
- "Creating tasks" on page 89
- "Recording costing information" on page 99

Viewing a problem investigation

Review the information included in the problem investigation, and any related records. To view the investigation, in the Assigned Work area, select the investigation, and then click View. The Problem Investigation form appears.

Figure 4-17: Investigation at investigation and diagnosis stage



Fields on the form display information that has been collected about the problem or the status of the problem investigation.

Process flow status

As the investigation moves through its life cycle, the Process Flow Status area displays the current stage of the investigation. Figure 4-17 shows an investigation at the third stage: investigation and diagnosis. The stage is highlighted in white and includes the label Normal. If the incident were pending further action, the current stage would be highlighted in yellow and include the label Pending.

For more information about the incident process flow, see "Process flow and the life cycle of a problem investigation" on page 21.

Documenting work with a vendor

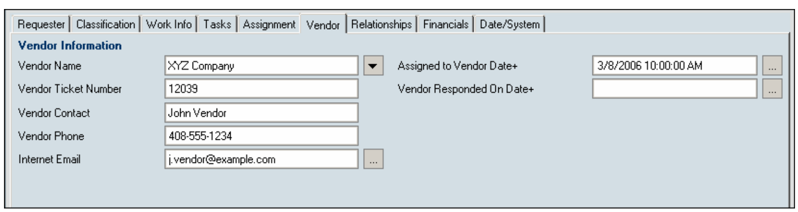
Use this procedure to track investigations that require vendor support, and to indicate when you assign an investigation to a vendor.

Important: If you assign an investigation to a vendor, you must communicate with the vendor as appropriate. Problem Management does not notify the vendor.

▶ To document work with a vendor

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. Open a problem investigation.
3. Click the Assignment tab.
4. For Assign to Vendor, select Yes.
5. Click the Vendor tab.

Figure 4-18: Completed Vendor tab



6. Complete the Vendor Information tab, as appropriate.
   - If the vendor is already defined, you can select the vendor.
   - If the vendor is not listed on the menus, you can type the vendor contact information.
   - The Internet Email field is for information only. Problem Management does not send email to the vendor.
7. Indicate the date that you assigned the investigation to the vendor.
8. Click Save.

Recording the root cause

When you determine the root cause of the problem, you can record it.

After you record the root cause, the problem investigation can be submitted as a known error or solution entry, as described in "Proposing a known error" on page 104 and "Creating a solution entry" on page 107.

▶ To record the root cause

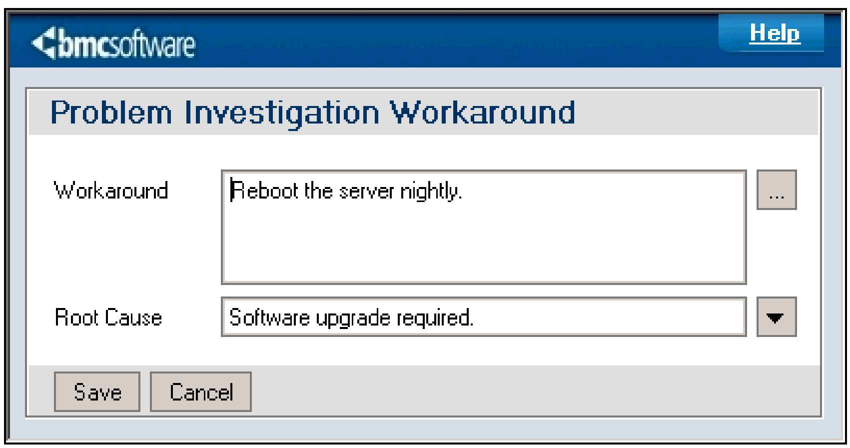
1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 In the Process Flow Status area, in the Investigation and Diagnosis box, choose Generate Work Around/Root Cause.

The Problem Investigation Workaround dialog box appears.

Figure 4-19: Problem Investigation Workaround dialog box



4 Select the root cause.

The Root Cause options available for selection depend upon the product and organizational categorizations that are associated with the root cause. Root cause selections are configured by your administrator, as described in the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

5 Click Save.

6 If a recent change is the root cause, relate the investigation to the change request, as described in "Working with relationships" on page 41.

7 If a known error is the root cause, relate the investigation to the known error, as described in “Working with relationships” on page 41.

Recording a work-around

It is important to record known work-arounds because:

- Work-arounds are viewable from Incident Management when searching for answers.
- If a related incident is not yet closed or canceled, the incident assignee is notified that a work-around is identified.

▶ To record a work-around

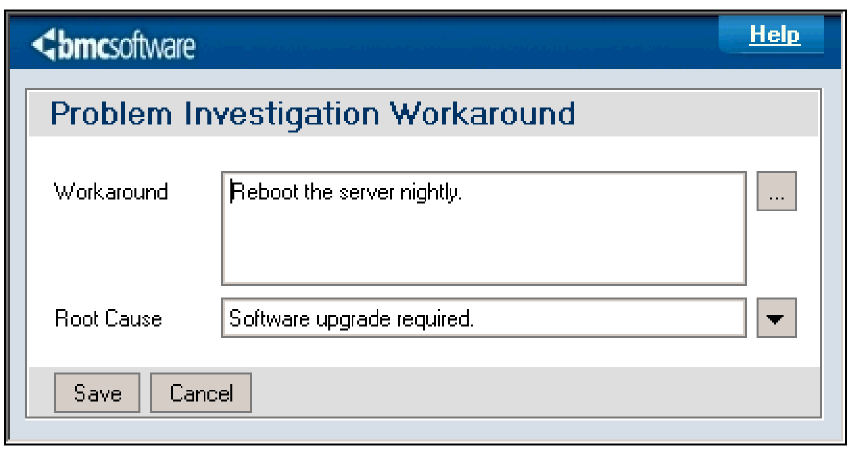
1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 In the Process Flow Status area, in the Investigation and Diagnosis box, choose Generate Work Around/Root Cause.

The Problem Investigation Workaround dialog box appears.

Figure 4-20: Problem Investigation Workaround dialog box



4 Type information in the Workaround field.

5 Click Save.

Recording costing information

NEW

You can record the cost involved in working on a problem investigation. If the investigation is related to an incident with CI unavailability, you can update the costs of CI unavailability.

Note: The CI unavailability feature is only available if BMC Remedy Asset Management is installed.

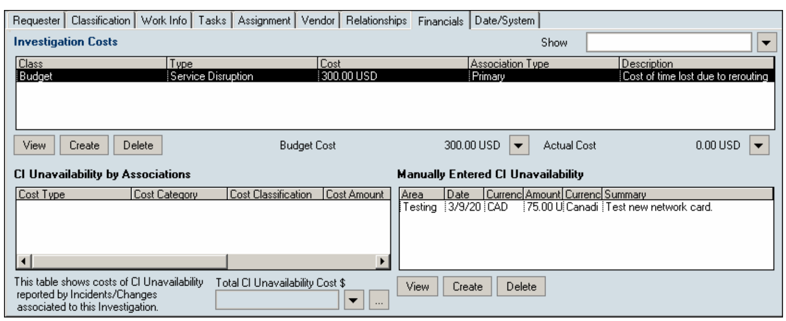
Recording the cost of working on an investigation

You can record the costs of working on the investigation on the Financials tab on the Problem Investigation form.

▶ To record the cost of working on an investigation

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. Open a problem investigation.
3. Click the Financials tab.

Figure 4-21: Problem Investigation form—Financials tab



4. Click Create.

   The Costs form appears.

   The Cost Category field is set to Problem Investigation. This indicates the form from which you entered the charge. You cannot change this value.
5. Select the appropriate cost center code from the list.

This is the code name for the business unit or organization within the company to be charged for servicing the incident. When you select the cost center code, the Company and Cost Center Name fields display the values attached to the cost center code.

6. From the Cost Classification list, select either Actual or Budget.
7. In the Related Cost field, type the cost amount, and select the currency from the list.
8. If appropriate, you can also:
   - Select the cost type. Cost types are defined by your organization for reporting purposes.
   - Enter a description.
   - Select the unit type. The unit type indicates whether cost is measured as a flat rate, or in hours or minutes. If you select a unit type of hours or minutes, you must type the number of hours or minutes in the Related Units field.
   - Enter the date the charge was incurred. To set it to the current date, you can leave this field blank.
9. Click Save.

   The totals for budgeted and actual costs appear at the bottom of the table.
10. Repeat steps 4 through 9 for each cost associated with the investigation.

Recording the cost of CI unavailability

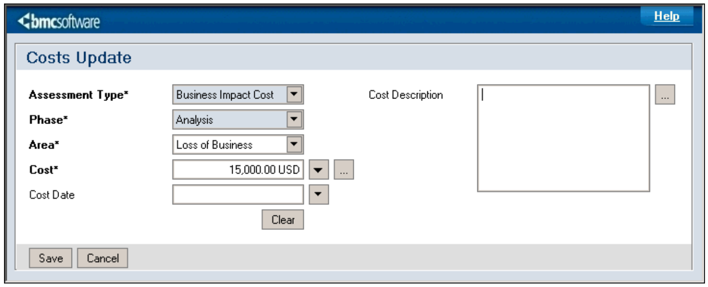
If CI unavailability is recorded for a related incident or change request, the cost of the CI unavailability appears on the Financials tab. You can record additional costs of CI unavailability.

▶ To record the cost of CI unavailability

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. Open a problem investigation.
3. Click the Financials tab.
4. In the Manually Entered CI Unavailability area, click Create.

   The Costs Update form appears.

Figure 4-22: Completed Costs Update form



5 Complete the form.

6 Click Save.

Resolving a problem investigation

The main purpose of this activity is to resolve the problem. The end result of the investigation might be a known error record or solution record.

▶ To resolve a problem investigation

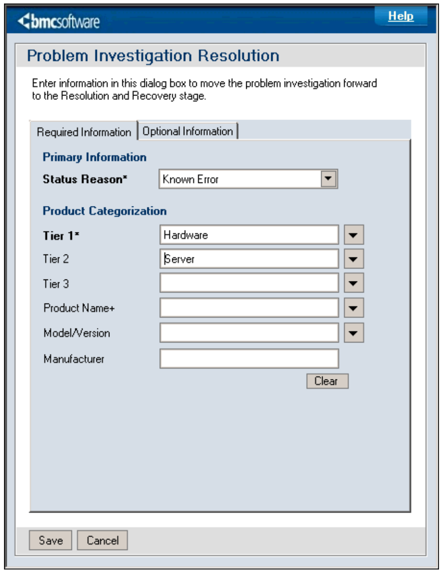
1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 In the Process Flow Status area, in the Investigation and Diagnosis box, choose Next Stage > Resolution.

The Problem Investigation Resolution form appears.

Figure 4-23: Problem Investigation Resolution form



4 Select the appropriate status reason.

If you select Known Error or Solution Database, the details of the problem investigation are copied to a new known error or Solution Database entry.

Important: If infrastructure change is required to permanently resolve the problem, then select Known Error from the Status Reason list. After you save the problem investigation, create the change request from the known error, as described in “Creating a change request” on page 119.

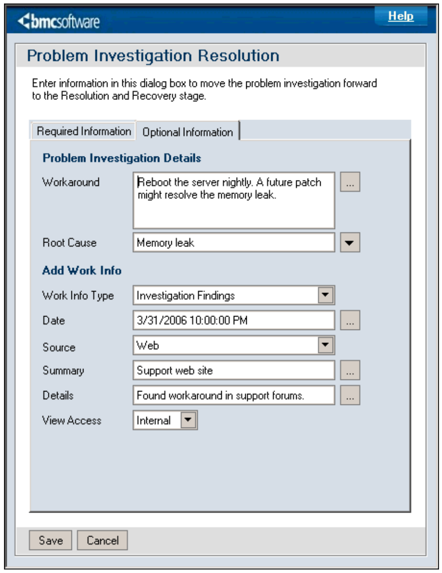
5 Select the appropriate product categorization.

To complete the problem investigation, you must select at least Tier 1 from the Product Categorization list.

6 To record optional recommended information, perform the following steps.

a Click the Optional Information tab.

Figure 4-24: Problem Investigation Resolution form—Optional Information tab



b Type a description of the work-around in the Work-around field.

c Select the root cause.

The Root Cause options available for selection depend upon the product and organizational categorizations that are associated with the root cause. Root cause selections are configured by your administrator, as described in the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

d Complete the fields in the Add Work Info area to describe the work performed to complete the problem.

7 Click Save to save your changes.

The status of the investigation is set to Completed.

If the status reason for the investigation is known error, the Known Error form appears, and details from the problem investigation are copied into the form.

8 Complete the form and save it, as described in "Proposing a known error" on page 104

If the status reason for the investigation is Solution Database, the Solution Database form appears, and details from the problem investigation are copied into the form.

9 Complete the form and save it, as described in “Creating a solution entry” on page 107.

Note: If the problem investigation is related to an incident that is not yet closed or canceled, the incident assignee is notified that the investigation is complete.

Proposing a known error

After you determine the root cause of a problem, you can propose a known error. Known errors are typically proposed for product defects against CIs, when attempting to plan for the correction of a CI, or both. To correct the CI, open a change request within the Change Management application. This function is facilitated through the known error process.

▶ To propose a known error

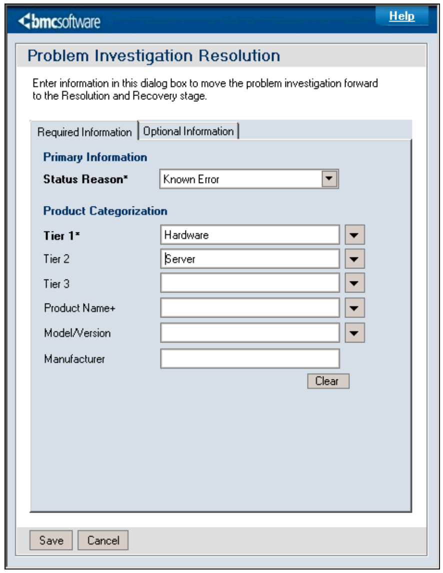
1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 If the problem investigation is complete and the root cause has been determined, in the Process Flow Status area, in the Investigation and Diagnosis box, choose Next Stage > Resolution.

The Problem Investigation dialog box appears.

Figure 4-25: Creating a known error when resolving an investigation



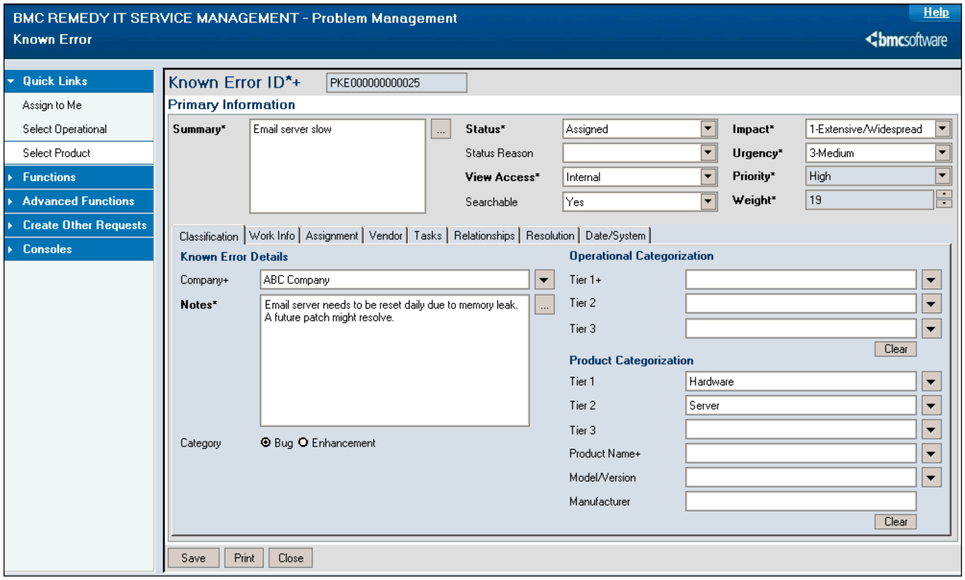
4 In the Status Reason field, select Known Error.

5 Complete the rest of the dialog box, as described in "Resolving a problem investigation" on page 101.

6 Click Save.

The Known Error form appears. Some fields are completed based on the problem investigation. The known error Status is set to Assigned, and the assignment fields copied from the problem investigation. A relationship is set between the problem investigation and the known error.

Figure 4-26: Known Error form



7 Complete the Known Error form, as described in “Recording a known error” on page 112.

8 Click Save.

Creating a solution entry

After you determine the root cause of a problem, you can create a solution entry. Typically, you might create a solution entry if you determine that the issue against the investigated CI is not a defect (that is, the CI is functioning as designed). In this scenario, a change request does not have to be issued for correcting the CI in question.

Note: Solution entries require that solution managers are defined. For details, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

▶ To create a solution entry

1 On the Problem Management console, click the Support Console tab if it is not selected.

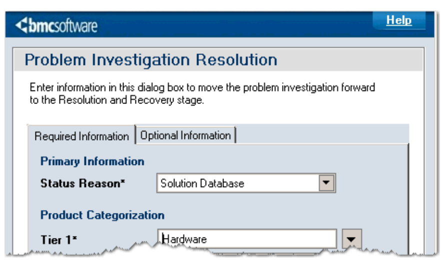
2 Open a problem investigation.

3 If the problem investigation is complete and the root cause has been determined, in the Process Flow Status area, in the Investigation and Diagnosis box, choose Next Stage > Resolution.

The Problem Investigation dialog box appears.

4 In the Status Reason field, select Solution Database.

Figure 4-27: Creating a solution entry when resolving a problem investigation

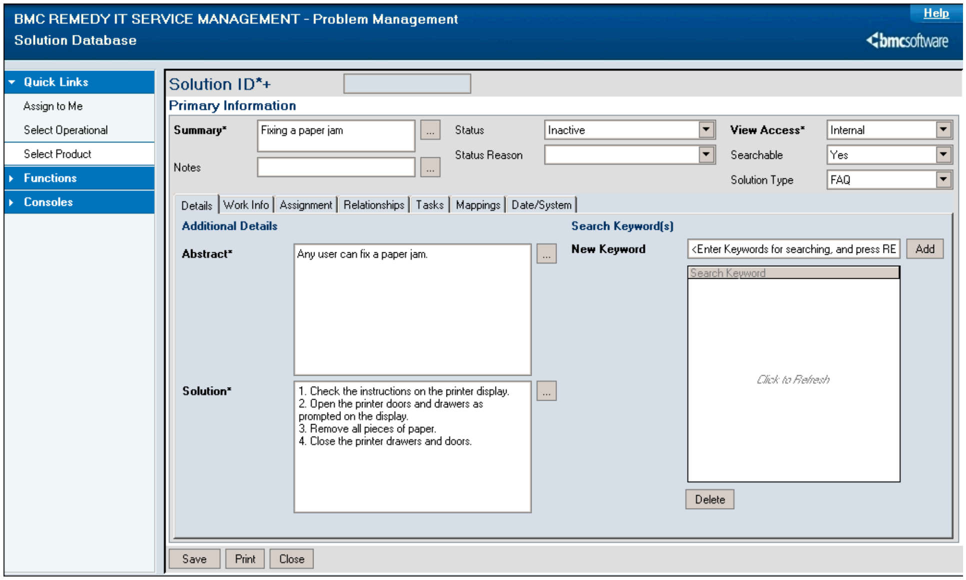


5 Complete the rest of the dialog box, as described in "Resolving a problem investigation" on page 101.

6 Click Save.

The Solution Database form appears. The status for the solution entry is set to Inactive. A relationship is set between the problem investigation and the solution entry.

Figure 4-28: Solution Database form



7 Complete the Solution Database form, as described in "Recording a solution entry" on page 122.

8 Click Save.

Closing a problem investigation

Closing a problem investigation indicates that you validated the results, that the results have been accepted by the customer, and that you have verified the problem data for integrity and accuracy.

Important: After you close a problem investigation, you can no longer modify it. Review all information about the form before you close the investigation.

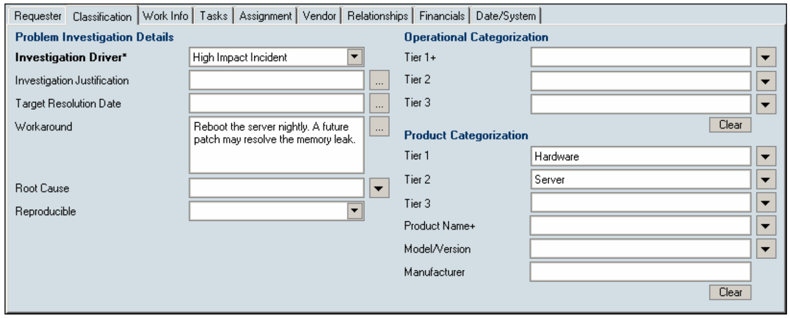
▶ To close a problem investigation

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Open a problem investigation.

3 Click the Classification tab.

Figure 4-29: Classification tab



4 Verify that the problem investigation details are complete.

5 In the Process Flow Status area, in the Resolution and Recovery box, choose Next Stage > Close.

The status is changed to Closed.

Chapter

5 Working with known errors as support staff

Known errors are generally driven by problem investigations and can be created directly from the investigation. The temporary work-around or permanent corrective actions for known errors can be used as the resolution for incidents related to the known error.

Record work performed on the known error in work information, as described in "Adding work information" on page 50.

The following topics are provided:

Recording a known error

This activity begins the error control process. Known errors might be identified when working on an incident, during a problem investigation, or from other sources, such as vendor updates.

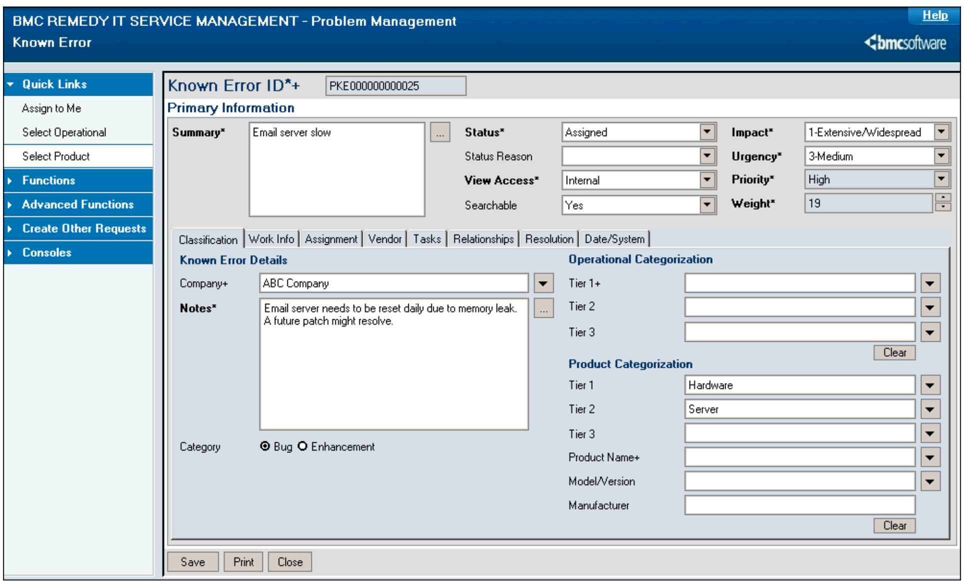
▶ To record a known error

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 Choose General Functions > New Known Error.

The Known Error form appears.

Figure 5-1: Completed Known Error form



3 Enter a brief description of the known error in the Summary field.

4 Select the appropriate status.

Status	Explanation
Assigned	This is the default value, and indicates that someone is assigned to work on the known error.
Scheduled for Correction	An infrastructure change is planned to correct the known error, but has not yet been planned or completed.
Assigned to Vendor	You are waiting for a vendor to supply a corrective action.
No Action Planned	There are no plans to implement a corrective action.

5 Select the impact and urgency. The priority and weight are calculated based on the impact and urgency. If required, you can adjust the weight.

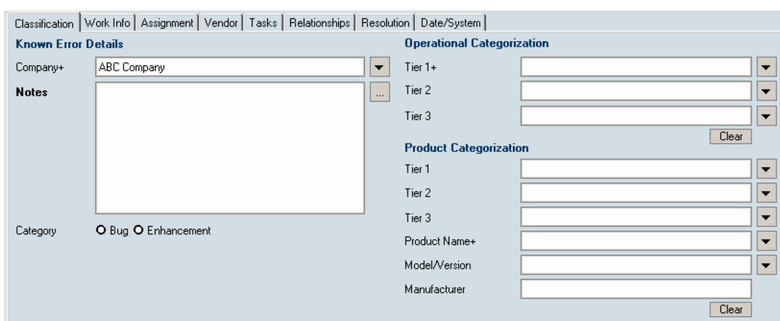
6 Select whether view access is internal or public.

This field is for informational purposes to indicate whether the known error is for internal consumption or for public consumption.

7 If you want the known error to be viewable in Incident Management, set Searchable to Yes.

8 Click the Classification tab.

Figure 5-2: Classification tab



9 In the Known Error Details area, select the company.

10 Enter a detailed description of the known error in the Notes field.

11 Select the appropriate operational categorization.

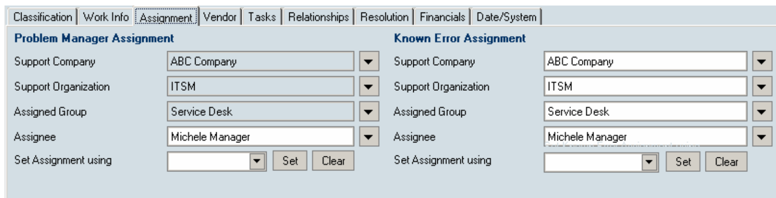
Operational categorization is based on a three-tier hierarchy that is defined in the Operational Catalog.

12 Select the appropriate product categorization.

Product categorization is based on a five-tier hierarchy that is defined in your Product Catalog.

13 Click the Assignment tab.

Figure 5-3: Assignment tab



14 If your default problem manager is configured, for Set Assignment using, select Problem Manager Default Group. Otherwise, select the appropriate problem manager.

Problem Manager Default Group selects the appropriate problem manager, based on the known error company, service, and product categorization.

15 You can leave the Known Error Assignment blank for the problem manager to select.

16 Complete other fields as required.

17 Click Save.

Investigating a known error

The main purpose of this activity is to identify the appropriate action to correct the error.

Best Practice

In some cases, the error might not be corrected. Management can use the results of the investigation to decide whether to leave the known error or proceed with the corrective action. For example, the cost of the corrective action might result in a decision to leave the known error.

Viewing a known error

When a known error was proposed from an incident or problem investigation, you might need to update the record.

▶ To view a known error

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. From the navigation pane, choose General Functions > Search Known Error.

   The Known Error form appears.
3. Complete search criteria for the known error, and click Search.
4. Select the known error.
5. If the known error was proposed from an incident or problem investigation, verify fields that were copied from the incident or investigation.

   The following fields are copied from the incident or investigation: Description, Impact, Urgency, Product and Organizational Categorization, and Work-around. The assignment is copied from problem investigations, but not from incidents.
6. Make changes as appropriate.
7. Click Save.

Working with a vendor

Use this procedure to track known errors that require vendor support, for example, if the vendor might provide a patch or upgrade that corrects the known error. When you work with a vendor, you can assign the known error to the vendor.

Important: If you assign a known error to a vendor, you must communicate with the vendor as appropriate. Problem Management does not notify the vendor.

▶ Working with a vendor

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 From the navigation pane, choose General Functions > Search Known Error.

The Known Error form appears.

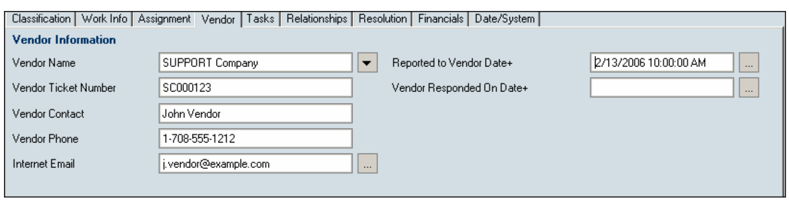
3 Complete search criteria for the known error, and click Search.

4 Select the known error.

5 Set the Status to Assigned to Vendor.

6 Click the Vendor tab.

Figure 5-4: Completed Vendor tab



7 Complete the Vendor tab, as appropriate.

- If the vendor is already defined, you can select the vendor company, organization, and group.
- If the vendor is not listed on the menus, you can type the vendor contact information.
- The Internet Email field is for information only. Problem Management does not send email to the vendor.

8 Indicate the Reported to Vendor Date.

9 Click Save.

Recording the root cause

The root cause might have been recorded during a problem investigation, but can also be recorded on the Known Error form.

▶ To record the root cause

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 From the navigation pane, choose General Functions > Search Known Error.

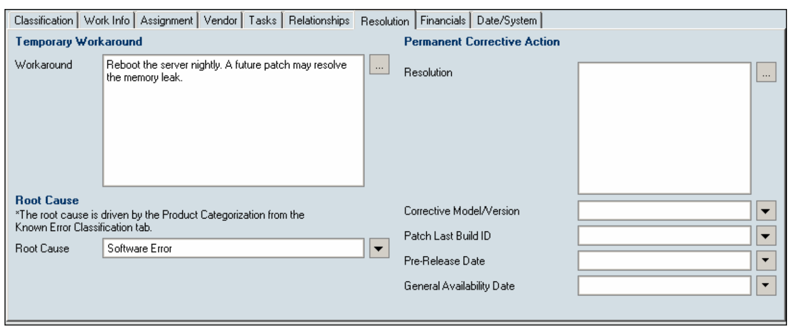
The Known Error form appears.

3 Complete search criteria for the known error, and click Search.

4 Select the known error.

5 Click the Resolution tab.

Figure 5-5: Resolution tab



6 In the Root Cause field, select the root cause.

The choices for root cause are based on matching the product and organizational categorization of the known error to what is defined in the Generic Catalog configuration form.

7 Click Save.

Recording a work-around

It is important to record known work-arounds because:

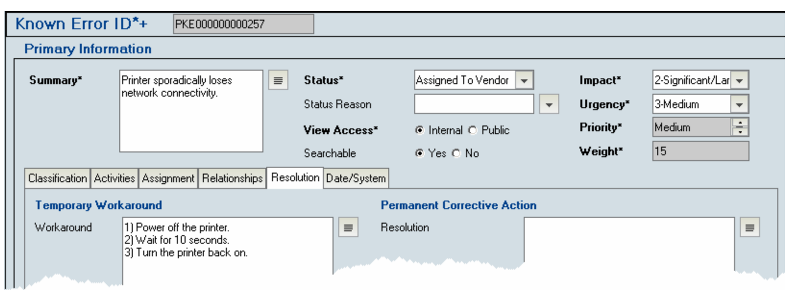
- Work-arounds are viewable from Incident Management when searching for a possible resolution.
- They can be viewed from the Requester console, helping IT users to resolve their own issues.
- If a related incident is not yet closed or canceled, the incident assignee is notified that a work-around is identified.

To record a work-around

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. From the navigation pane, choose General Functions > Search Known Error.

   The Known Error form appears.
3. Complete search criteria for the known error, and click Search.
4. Select the known error.
5. If there are no plans to implement a corrective action, you can set the Status to No Action Planned.
6. Click the Resolution tab.

Figure 5-6: Known error with work-around



7. Enter information in the Workaround field.
8. To make the work-around available for resolving incidents, toward the top of the form, make sure that Searchable is set to Yes.
9. Click Save.

Resolving a known error

The main purpose of this activity is to undertake the appropriate action to correct the error, such as creating a change request. In some cases, the error might not be corrected, in which case you can record a work-around.

Creating a change request

You can create an infrastructure change record from the known error if you have permission to submit change requests.

▶ To create a change request

1. On the Problem Management console, click the Support Console tab if it is not selected.
2. From the navigation pane, choose General Functions > Search Known Error.

   The Known Error form appears.
3. Complete search criteria for the known error, and click Search.
4. Select the known error.
5. From the navigation pane, choose Create Other Requests > Create Change.

   The Infrastructure Change form appears.

   Information from the known error is already entered in the form. A relationship is defined between the known error and the change record.

   See the *BMC Remedy Change Management 7.0 User's Guide* for details on completing and submitting the infrastructure change form.
6. Complete the form.
7. Click Save.

Recording a corrective action

After you identify a permanent corrective action, you can document it. If the known error is related to an incident that is not closed or canceled, the incident assignee is notified that the known error is resolved. The incident assignee can determine whether the known error resolution also resolves the incident.

▶ To record a corrective action

1 On the Problem Management console, click the Support Console tab if it is not selected.

2 From the navigation pane, choose General Functions > Search Known Error.

The Known Error form appears.

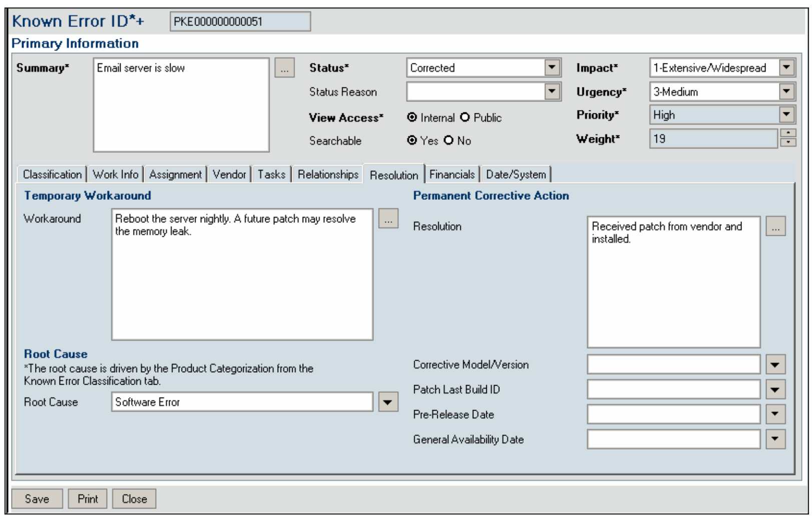
3 Complete search criteria for the known error, and click Search.

4 Select the known error.

5 In the navigation pane, choose Advanced Functions > Resolve.

The status is set to corrected, and the Resolution tab of the Known Error form appears.

Figure 5-7: Corrected known error



6 Complete the fields in the Permanent Corrective Action area.

7 Update the root cause, if appropriate.

8 Click Save.

Chapter

6 Working with the Solution Database

The Solution Database is a central repository of solutions that you create in Problem Management, and which can be accessed from within the Incident Management application. When you first record a solution entry, it is in an inactive state. Active solution entries can be searched from Incident Management and are displayed in the Requester console.

The following topics are provided:

Recording a solution entry

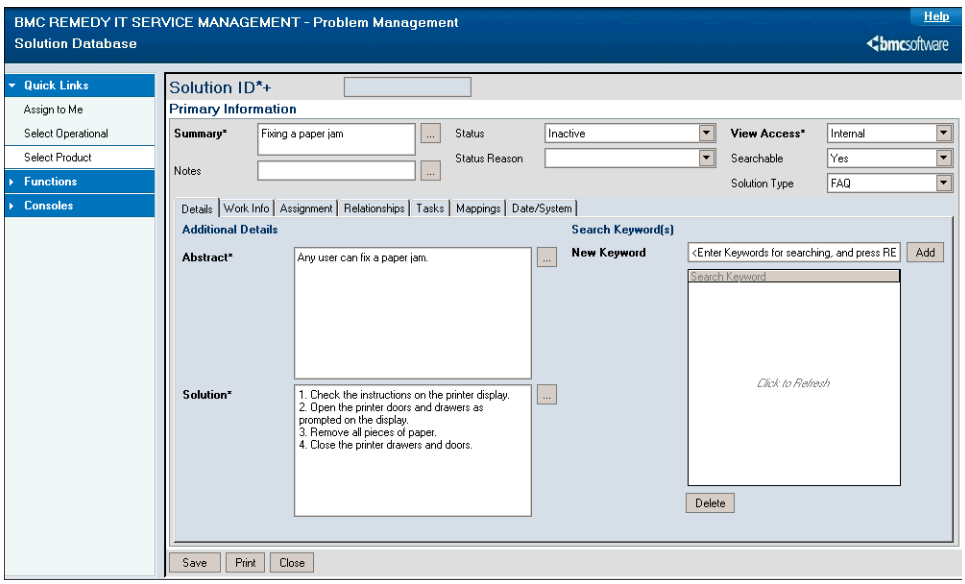
You can record solution entries in the Solution Database. Solution entries can also be recorded from incidents and problem investigations.

▶ To record a solution entry

1 From the navigation pane of the Problem Management console, choose General Functions > New Solution.

The Solution Database form appears.

Figure 6-1: Solution Database form



2 In the Summary field, type a brief description or title for the solution entry.

3 Set the Status field as follows:

- If you plan to continue to work on the solution entry, or if someone else will review the solution entry, leave the default value of Inactive.
- If the solution entry is ready for others to use, change the Status to Active.

4 Specify how users can view the entry.

- To make the entry available to the Requester console, set the View Access to Public.

- To exclude the entry from relationship searches, set the Searchable field to No.

5 If appropriate, select FAQ in the Solution Type list.

The Solution Type can be either unspecified or FAQ. When searching the Solution Database, users can restrict search results to FAQs.

6 On the Details tab in the Abstract field, type a brief summary of the solution entry.

7 In the Solution field, describe the solution and any applicable procedures.

8 Enter at least one search keyword, as described in "Adding search keywords to a solution entry" on page 124.

9 Define the default mapping, as described in "Defining mapping for a solution entry" on page 125.

From the Incident Management console, users can use the Incident Matching function to search for solutions that match the defined mapping. Automatic assignment uses the default mapping to select a problem manager or staff assignee.

10 Complete other fields as required.

11 Click Save.

The solution entry is assigned to the appropriate problem support group, based on the solution entry's default mapping and solution assignments within the Assignment form.

Adding search keywords to a solution entry

Search keywords are used to find matching solutions, when performing searches for solutions from other applications, such as Incident Management. For this reason, it is important to enter at least one keyword.

▶ To add a search keyword to a solution entry

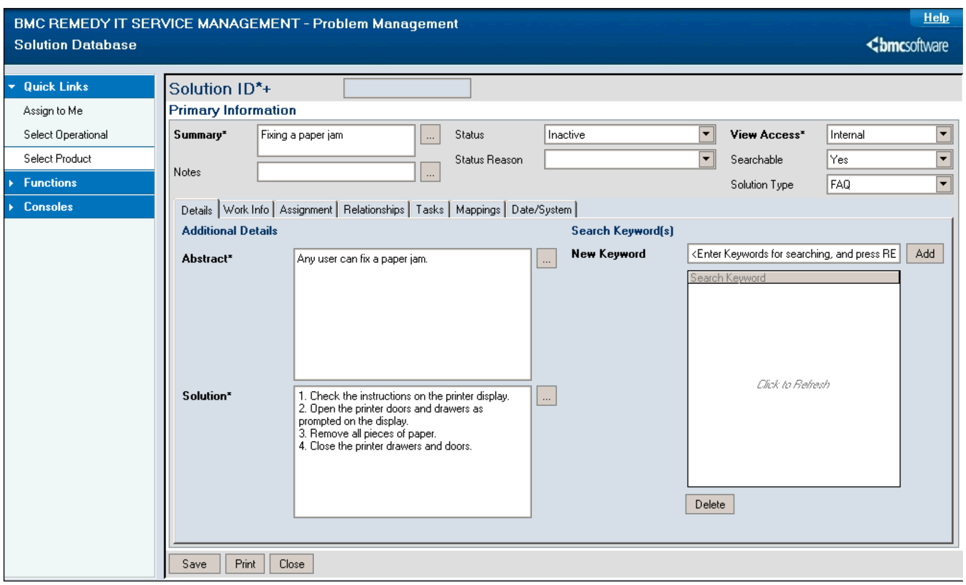
1 From the Problem Management console, choose General Functions > Search Solution.

The Solution Database form appears.

2 Complete search criteria for the solution, and click Search.

3 Select the solution.

Figure 6-2: Solution Database form



4 In the Search Keyword field, enter a word, phrase, or sentence.

5 Click Add to add the keyword to the list.

6 To enter additional keywords, repeat steps 4 and 5 for each keyword.

7 Click Save.

Defining mapping for a solution entry

When someone searches for solutions from Incident Management, the Incident Matching function finds solutions according to the mapping that you define here.

Each solution entry must include a default mapping. In addition to the default mapping, a solution entry can include additional mappings.

Note: Selections on the Mapping tab *restrict* the search results from incident matching. For example, if you specify the organization and all three tiers of operational categorization for the mapping, only incidents that match the organization and all three tiers of operational categorization can find this solution entry.

To allow multiple searches to find the solution entry, create additional mappings. For example, if a solution entry applies to either of two printer models, you can create a default mapping that specifies one printer model, and create an additional mapping that specifies the other printer model.

Setting the default mapping

The default mapping is used for both searching and for automatic routing to the solution assignee.

When a user creates a solution entry from an incident or a problem investigation, the default mapping is set to the categorization of the incident or problem investigation. You might need to modify the mapping.

▶ To set the default mapping

1 From the Problem Management console, choose General Functions > Search Solution.

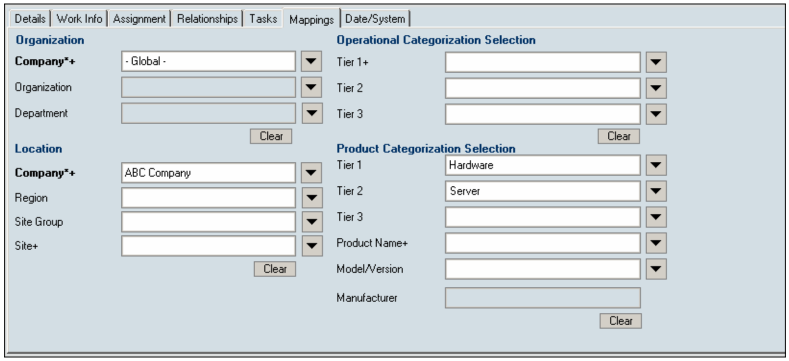
   The Solution Database form appears.

2 Complete search criteria for the solution, and click Search.

3 Select the solution.

4 Click the Mappings tab.

Figure 6-3: Default Mappings tab



5 If the solution entry applies to all companies, set the Company to Global.

6 If the solution entry applies to all company locations, set the Company Location to Global.

7 If appropriate, indicate that the solution entry applies only to a specific:

- Company
- Organization or department within the company
- Company location
- Region, site group, or site within the company location

8 If the solution entry applies to a specific service, select the appropriate fields in the Operational Categorization Selection area.

9 If the solution entry applies to a specific product, select the appropriate fields in the Product Categorization Selection area.

10 Click Save.

Setting an additional mapping

You can set additional mappings to allow the solution to be searchable by a combination of organization, location, organizational categorization, and product categorization. For example, the solution entry might pertain to two or more products. The additional products can be associated with the solution entry using additional product categorization mappings.

To set an additional mapping

1 From the Problem Management console, choose General Functions > Search Solution.

The Solution Database form appears.

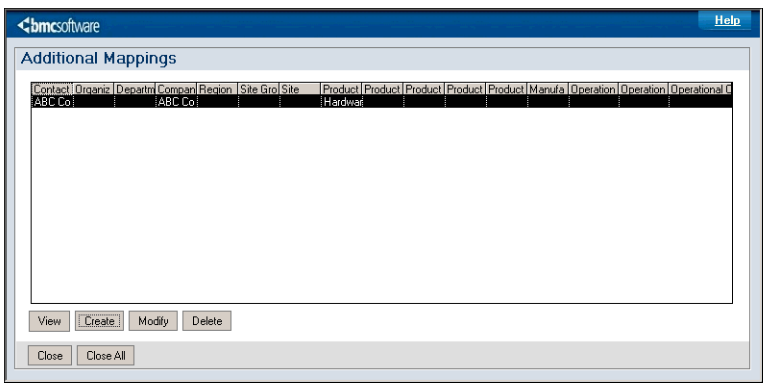
2 Complete search criteria for the solution, and click Search.

3 Select the solution.

4 From the navigation pane, choose Functions > Additional Mapping.

The Additional Mappings dialog box appears.

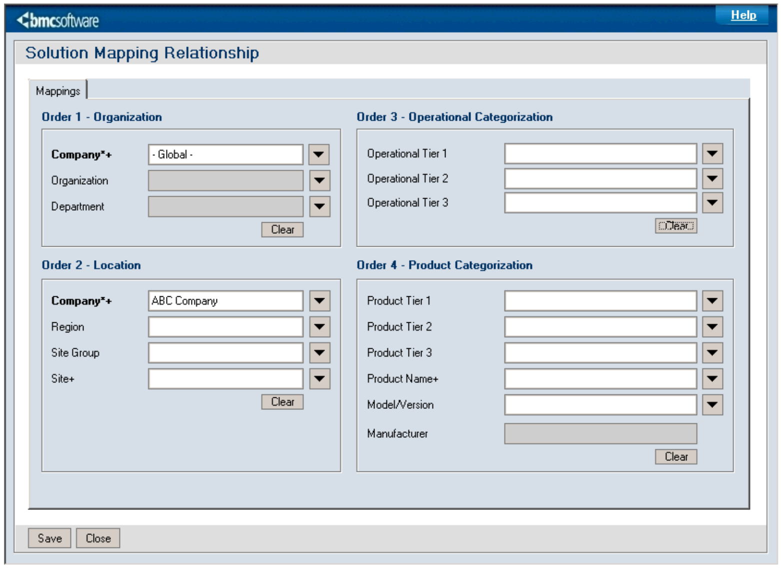
Figure 6-4: Additional Mappings dialog box



5 Click Create.

The Solution Mapping Relationship form appears.

Figure 6-5: Solution Mapping Relationship form



6 Make the appropriate selections.

This form is similar to the Default Mappings tab, as described in "Setting the default mapping" on page 125.

7 Click Save.

Assigning a solution entry

You can manually assign or reassign a solution entry.

▶ To assign a solution entry

1 From the Problem Management console, choose General Functions > Search Solution.

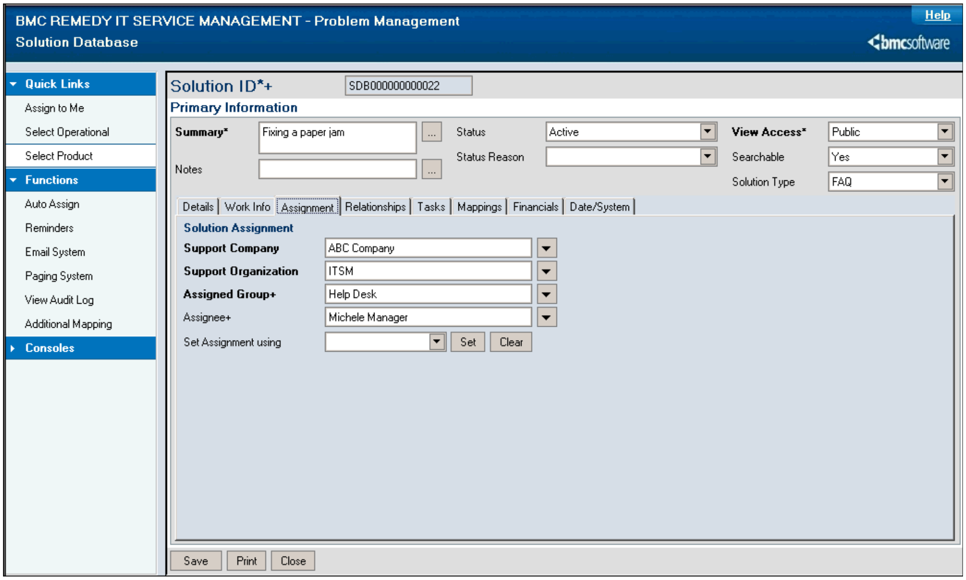
The Solution Database form appears.

2 Complete search criteria for the solution, and click Search.

3 Select the solution.

4 Click the Assignment tab.

Figure 6-6: Assigning a solution entry



5 Indicate the appropriate assignee, as follows:

- To assign the solution entry to yourself, in the navigation pane, choose Quick Links > Assign to Me.
- To assign the solution entry, based on predefined routing, in the navigation pane, choose Functions > Auto Assign.
- Otherwise, select the appropriate assignee in the Assignment tab.

6 Click Save.

Activating a solution entry

Verify the description and solution of the solution entry before you make it active. If appropriate, make corrections. Record your work, as described in "Adding work information" on page 50.

▶ To activate the solution entry

1. From the Problem Management console, choose General Functions > Search Solution.

   The Solution Database form appears.
2. Complete search criteria for the solution, and click Search.
3. Select the solution.
4. Click View.
5. If the solution entry was created from an incident or problem investigation, verify that all fields are correct.

   When a solution entry is created from an incident or problem investigation, the Description, Abstract, and Solution fields are copied. The default mapping is set to the location, organization, product categorization, and organizational categorization of the incident or problem investigation.
6. Verify that the solution entry is appropriate for the Solution Database, and is not a duplicate entry.
7. Specify how users can view the entry.
   - To make the entry available to the Requester console, set the View Access to Public.
   - To exclude the entry from relationship searches, set the Searchable field to No.
   - Select the appropriate solution type. If you select FAQ, staff can search for this solution entry as a FAQ.
8. Change the status to Active.
9. Click Save.

Chapter

7 Working with Problem Management as a manager

This section describes functions that are available to managers. An individual is defined as a problem manager by giving the user the functional role of problem manager for the support groups to which he or she belongs. For details, see the *BMC Remedy IT Service Management 7.0 Configuration Guide.*

The following topics are provided*:*

Understanding the Manager Console tab

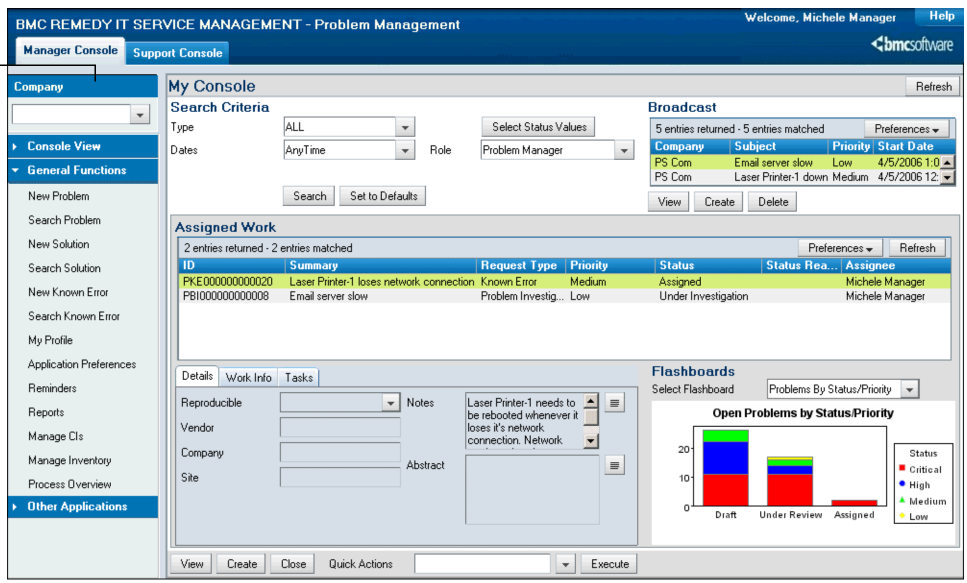
NEW

With Problem Management version 7.0, managers now have a separate console. This console includes:

- **Navigation pane**—Provides high-level filters, links to functionality, and links to other programs.
- **Search Criteria area**—Used to search for assigned work.
- **Broadcast area**—Displays broadcasts and provides broadcast functionality. For details, see “Broadcasting messages” on page 54.
- **Assigned Work area**—Displays a summary of assigned problem investigations, known errors, and Solution Database entries.
- **Flashboards area**—Provides a high-level graphical overview.

Figure 7-1: Problem Management console—Manager Console tab

Navigation pane



Both the navigation pane and the Search Criteria provide options to filter the Assigned Work displayed on the console, as summarized in the following table.

Table 7-1: Options to filter display of assigned work

Option	Explanation
Company	If you support multiple companies, leave this blank to display work for all companies, or select the appropriate company.
Console View	You can look at the Personal view for work assigned to you, or you can change to view work assigned to your support groups. You can also view work that has been assigned to your workgroup, but is still unassigned to an individual.
Type	You might want to view only Solution Database entries, known errors, or problem investigations. You can also view all three types of records.
Dates	You can view open assigned tickets that were opened Any Time. You can also restrict the display to tickets opened within the selected time, such as within the last 24 hours.
Role	Problem managers can select either the problem manager or Assignee role.
Select Status Values	You can filter displayed problem investigations, known errors, and solution entries by status value. If you do not make changes, then open problem investigations, open known errors, and active solution entries are displayed. You can select instead, for example, to display completed problem investigations and inactive solution entries.

Reviewing problem investigations

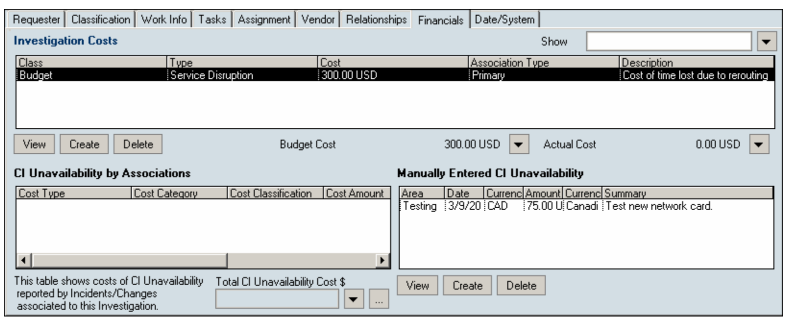
When a problem investigation is proposed, you can validate the impact of the problem and compare the estimated costs of the investigation with those related to the problem while it continues. To proceed with the investigation, assign it to a problem assignee, as described in "Managing assignments" on page 135. If the investigation is not justified, or is a duplicate of a current investigation, you can cancel it, as described in "Canceling a problem investigation" on page 138.

After a problem investigation is complete, you can view and validate the information. As appropriate, either close the problem investigation or send it back to the problem assignee for additional work.

Performing cost analysis

The Financials tab shows the financial impact of the problem on a company or site. Knowing how much an unresolved problem costs is key to determining whether and when to perform a formal problem investigation.

Figure 7-2: Financials tab



This tab displays Investigation Costs. If Asset Management is installed, this tab also displays Cost of CI Unavailability. For details on creating cost records, see "Recording costing information" on page 99.

Managing assignments

An investigation can be assigned to an individual or a group.

If more than one person will work on the problem investigation, assign the investigation to the person with overall responsibility for the investigation, and create tasks for others to perform, as described in "Creating tasks" on page 89.

Note: Known errors and solution entries can also be assigned by the same process.

Viewing unassigned investigations

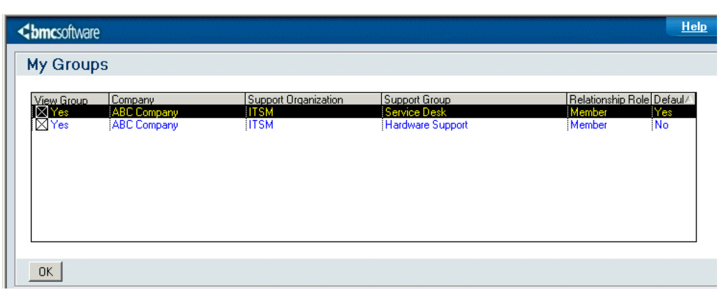
A problem investigation might be assigned to your support group without being assigned to an individual. View the unassigned investigations, then assign them as described in "Assigning an investigation" on page 136.

To view unassigned investigations

1. On the Problem Management console, click the Manager Console tab if it is not selected.
2. From the navigation pane, perform one of the following steps:
   - Choose Console View > Select My Groups > Show Unassigned.
   - Choose Console View > All My Groups > Show Unassigned.
3. If you are viewing unassigned investigations for selected groups, you must confirm the selected groups, as follows.

   The My Groups dialog box appears.

Figure 7-3: My Groups dialog box



a In the View Group column, for each group, select Yes or No to indicate whether investigations assigned to that group are displayed.

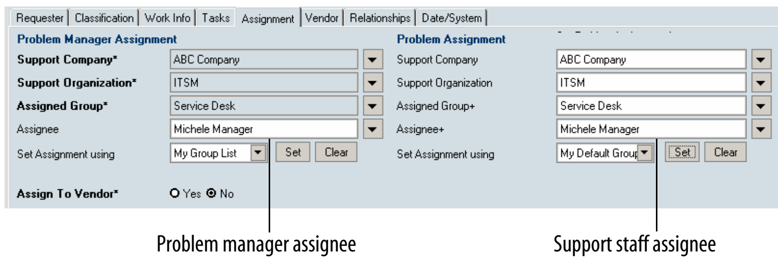
b Click Update.

The Assigned Work area shows unassigned investigations for the support groups.

Assigning an investigation

Investigations are assigned to a problem manager and also to support staff.

Figure 7-4: Current Assignment tab, indicating investigation assignees



Assigning an investigation to a problem manager

Problem managers are defined by giving the individuals the functional role of problem manager for the support groups to which they belong. For details, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

▶ To assign an investigation to a problem manager

1 On the Problem Management console, click the Manager Console tab if it is not selected.

2 Open a problem investigation.

3 Click the Assignment tab.

4 In the Problem Manager Assignment area, select the problem manager.

- If problem manager groups are defined, select Pblm Mgr Default Group from the Set Assignment Using list, then click Set. Then, select the problem manager based on the problem location, organizational categorization, and product categorization.
- To assign yourself as the problem manager, click My Default Group.

5 Click Save.

Assigning an investigation to support staff

You can assign the investigation to anyone belonging to a support group. To reassign the investigation to another support group or to an assignee in another support group, see "Reassigning an investigation" on page 88.

▶ To assign an investigation to support staff

1 On the Problem Management console, click the Manager Console tab if it is not selected.

2 Open a problem investigation.

3 Indicate the appropriate assignee, as follows:

- To assign the investigation to yourself, in the navigation pane, choose Quick Links > Assign to Me.
- To assign the investigation based on predefined routing, in the navigation pane, choose Functions > Auto Assign.
- Otherwise, click the Assignment tab. Then in the Problem Assignment area, select the appropriate assignee.

4 Click Save.

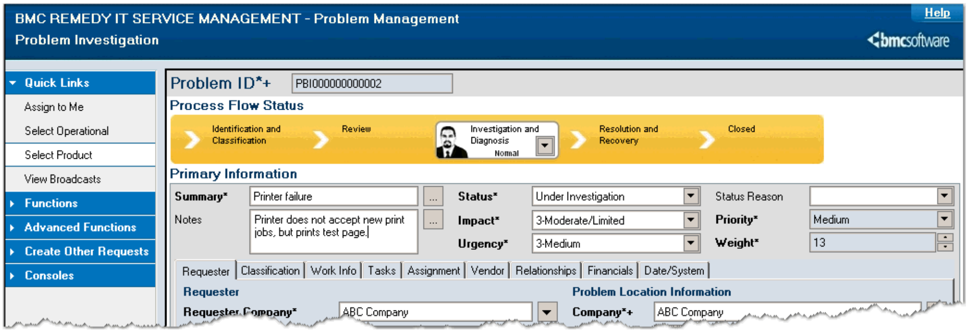
Monitoring a problem's status

The Process Flow Status area indicates the current stage and state of an investigation. The effort tracking feature records the history of assigned work that has been performed on the investigation.

Process flow status

The Process Flow Status area provides a quick visual indicator of the current stage and state of an investigation. When you open an investigation, the Process Flow Status area is displayed toward the top of the form.

Figure 7-5: Process Flow Status area



For additional information, see “Process flow and the life cycle of a problem investigation” on page 21.

Effort tracking The investigation effort log attached to the Problem Investigation form displays a list of all individuals who have worked on the problem during its life cycle. This information is not system-generated; staff record this manually, as described in “Recording effort spent on an investigation” on page 87.

Canceling a problem investigation

If an investigation is not justified or is a duplicate of a current investigation, you might want to cancel it.

▶ To cancel a problem investigation

1. On the Problem Management console, click the Manager Console tab if it is not selected.
2. Open a problem investigation.
3. Update the form, as appropriate.
4. Select Canceled in the Status field.
5. Click Save.

Reviewing known errors

When a known error is initiated, you might want to review the error to confirm the assignment. To change the assignment, follow the procedure described in "Assigning a known error" on page 139.

After a known error is resolved, you can review the error to confirm the resolution or close the error.

Assigning a known error

If the known error was proposed from a problem investigation, the known error is assigned to the assigned person assigned the problem investigation. You can change the assignee, if you want.

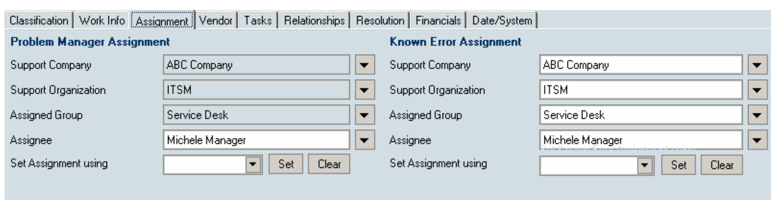
▶ To assign a known error

1 On the Problem Management console, click the Manager Console tab if it is not selected.

2 Open a known error.

3 To verify the current assignee, click the Assignment tab.

Figure 7-6: Assignment tab



4 Indicate the appropriate assignee, as follows:

- To assign the known error to yourself, in the navigation pane, choose Quick Links > Assign to Me.
- To assign the known error, based on predefined routing, in the navigation pane, choose Functions > Auto Assign.
- Otherwise, in the Assignment tab, select the appropriate problem manager and known error assignee.

5 Click Save.

Closing a known error

After staff complete a known error, the error can be closed. Closing a known error indicates that it has been corrected and that you have completed any required reviews.

Note: Closed known errors can be updated but not reopened.

▶ To close a known error

1. On the Problem Management console, click the Manager Console tab if it is not selected.
2. Open a known error.
3. Change the status to closed.
4. Click Save.

Understanding notifications

The purpose of the notification policy is to make sure that the appropriate IT support staff and managers are informed of problem investigations, known errors, and solution entries. Notifications from the application are automated and driven by events of the application. There might be some circumstances when you must manually send a notification.

Automated notifications are sent to individuals or groups, such as when an incident is created, assigned, or resolved. Individual and system-wide preferences indicate whether to send notifications by alert, email, or pager. The administrator can configure the notification method, as to whether business hours and holidays are respected, and whether to send individual or group notifications. For details on configuration, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

The following scenarios are examples of notifications sent from Problem Management:

- When the problem investigation or known error is has a work-around identified or is resolved, assignees of related incidents that are not yet closed or canceled are notified.

- When a new problem investigation is ready for a problem manager’s review. The notification is sent when the Status of the problem investigation is set to Under Review.
- When a problem investigation or known error is assigned to a support group, notification is sent to the problem manager for the support group.

Viewing the audit log

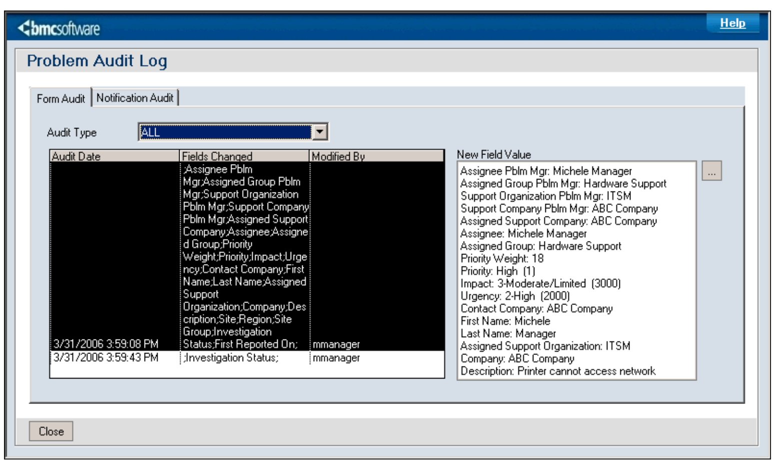
You can view field changes and notifications for problem investigations, known errors, and solution entries. The application generates an audit entry when system notifications are sent, and also when the record is modified; it creates an audit entry for each field and relationship that is modified. The Login ID of the individual making the change appears next to the audit entry.

▶ To view the audit log

1. On the Problem Management console, click the Manager Console tab if it is not selected.
2. Open a problem investigation, known error, or solution entry.
3. In the navigation pane, choose Functions > View Audit Log.

   The Audit Log window appears. Changes to fields are displayed on the Form Audits tab.

Figure 7-7: Audit log



4. To filter the list, select the appropriate audit type.

The Audit Type list provides selections for fields, such as Status, and groups of related fields, such as Key Dates. The filter displays audit records for changes to the selected field or fields.

5 To view notifications, click the Notification Audits tab.

All notifications that are sent from investigations, known errors, and solution entries are audited. The notifications are displayed on the Notification Audits tab.

Chapter

8 Managing configuration items

A *configuration item* (CI) is any component of an infrastructure, for example, hardware or software components, a service, an inventory location, a network (LAN or WAN), and so on.

You can use the information in CIs to diagnose user problems or to determine if a change to a CI or the IT infrastructure must be made. For example, if a user calls in with a printing problem, a staff member can check to see if the printer (CI) is down or in repair.

To record information against CIs, such as CI unavailability or relating an incident to a CI, the CI must be recorded in the CMDB. If you do not have BMC Remedy Asset Management, then Problem Management provides limited ability to manage CIs and inventory.

Note: If you have BMC Remedy Asset Management, you can manage CIs and inventory from Asset Management, as described in *BMC Remedy Asset Management 7.0 User's Guide*.

The following topics are provided:

Creating a CI

To create a CI, you must have Asset Admin permission. If you have Asset User permission and you need to modify a CI, your administrator must open the appropriate CI, and then relate your support group to the CI.

The fields on the CI form vary with the CI type. This section provides examples of creating three types of CIs:

- "Creating a computer system CI" on page 144
- "Creating a bulk inventory CI" on page 147
- "Creating an inventory location CI" on page 149

Creating a computer system CI

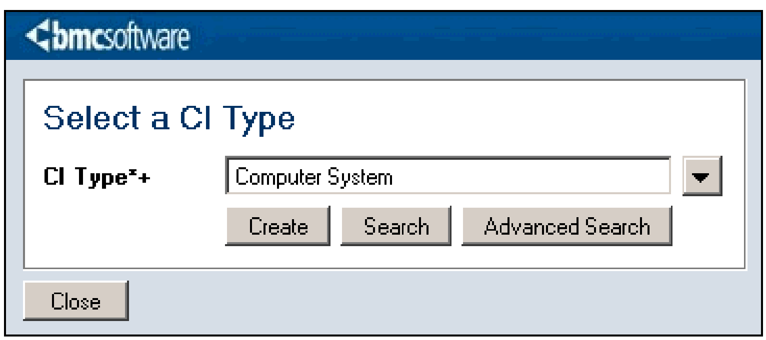
The following procedure is an example of creating a computer system CI. To create other types of CIs, the general procedure is similar, with the exception of specific fields on the CI form.

▶ To create a computer system CI

1 From the navigation pane in the Problem Management console, choose General Functions > Manage CIs.

The Select a CI Type dialog box appears.

Figure 8-1: Select a CI Type dialog box

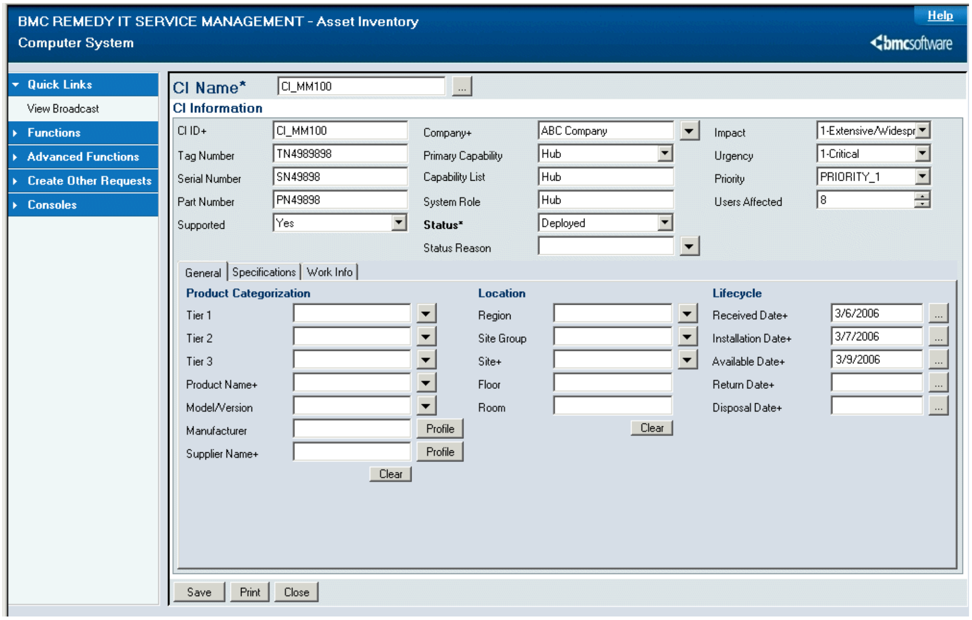


2 From the CI Type list, select System > Computer System.

3 Click Create.

The Computer System form appears.

Figure 8-2: Completed Computer System form



4 In the CI Name field, type a name for the CI.

Best Practice

When creating a CI name, you should follow a consistent naming convention. According to ITIL guidelines, identifiers should be short but meaningful, and for hardware, not based on supplier device names. For example, the name could include an indicator of the CI's function (such as "Workstation" or "Monitor") followed by a numeric code, such as MONITOR100.

5 In the CI ID field, type a unique alphanumeric value for the CI.

6 Specify whether the CI is supported by selecting Yes or No from the Supported list.

7 Select the company to which this CI belongs.

8 From the Primary Capability and Capability lists, select which roles this CI performs in your company's topology.

9 Select a status from the Status list.

The default value is Ordered. You can select one of the following options.

Status	Description
Received	The CI was received in shipping.
Being Assembled	The CI is being assembled.
Deployed	The CI was installed.
In Repair	The CI is down for maintenance.
Down	The CI is down, but not yet in maintenance.
End of Life	The CI is no longer being deployed.
Transferred	The CI was transferred to another location.
Delete	The CI is marked for deletion. You must be a member of the APP-Management or APP-Administrator group to mark a CI for deletion.
In Inventory	The CI is in inventory but not yet deployed. When you select this status, you are prompted to select the inventory location.
On Loan	The CI is on loan to another location.
Disposed	The CI is no longer available and was disposed of.
Reserved	The CI was reserved and taken out of inventory.
Return to Vendor	The CI must be returned to the vendor as damaged or unwanted.

10 Select what impact or urgency this CI will have if it goes down.

The Impact and Urgency fields drive what appears in the Priority field.

11 In the Users Affected field, specify the number of people who use this CI or will be affected if it goes down.

12 Complete the other fields in this area.

Field name	Description
Tag Number	The CI tag number. This is the number usually placed on the product by a member of your IT department to track the CI.
Serial Number	The CI serial number.
Part Number	The CI part number.
System Role	The role this CI plays in your company.
Status Reason	The reason this CI has the status it does.

13 In the General tab, categorize your CI using the lists and fields in the Product Categorization area.

14 Specify the location of the CI using the lists and fields in the Location area.

15 Enter the dates of the CI in the Lifecycle area.

16 Click the Specifications tab.

17 Add additional information about the CI.

18 Click Save.

Creating a bulk inventory CI

Use the following procedure to create bulk inventory CIs.

▶ To create a bulk inventory CI

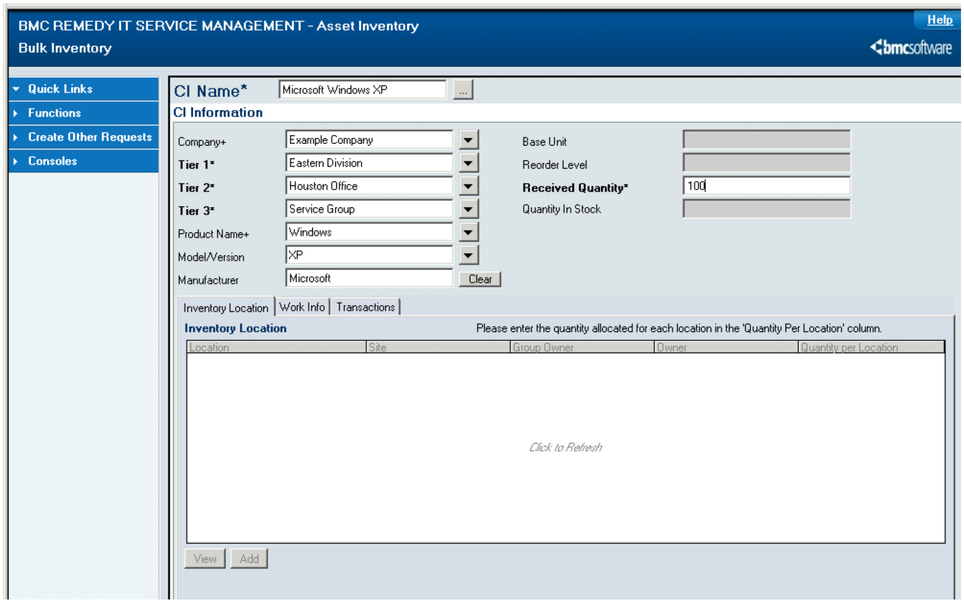
1 From the navigation pane in the Problem Management console, choose General Functions > Manage CIs.

The Manage CI Information dialog box appears.

2 From the CI Type list, select Bulk Inventory > Bulk Inventory, and click Create.

The Bulk Inventory form appears.

Figure 8-3: Completed Bulk Inventory form



3 Complete the following required fields.

Field name	Description
CI Name	Enter the name of the bulk inventory item, for example, Microsoft Windows XP.
Tier 1, Tier 2, and Tier 3	Categorize the item.
Received Quantity	Enter the number of items received.

4 Click Save.

Creating an inventory location CI

The following procedure uses the example of creating a location CI. Location CIs can be used when managing inventory. Use them to indicate where bulk inventory and other CIs are located.

▶ To create a location CI

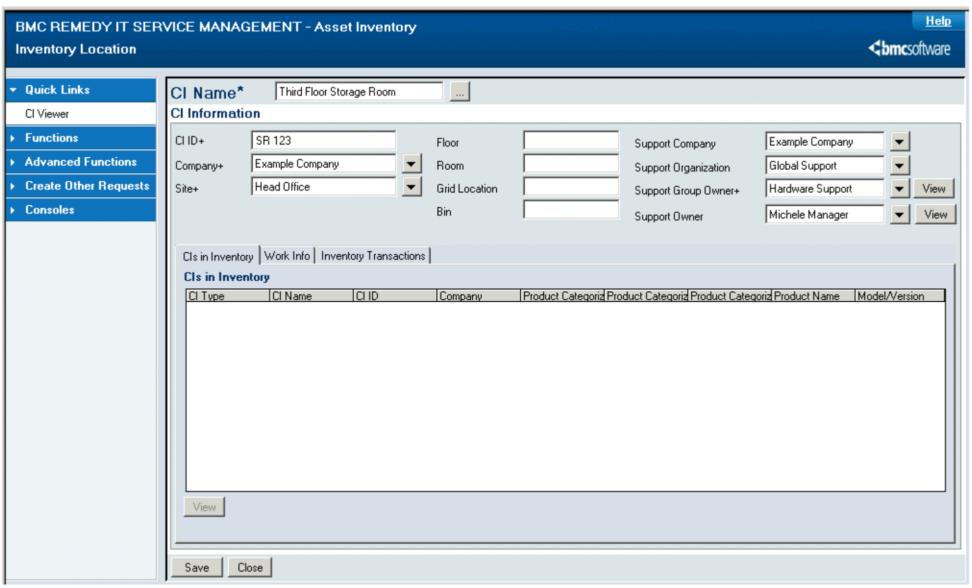
1 From the navigation pane in the Problem Management console, choose General Functions > Manage CIs.

The Manage CI Information dialog box appears.

2 From the Type list, select System > Inventory Location, and click Create.

The Inventory Location form appears.

Figure 8-4: Completed Inventory Location form



3 In the CI Name field, enter the location name.

4 Complete the other, optional fields.

5 Click Save.

Managing inventory

You can use the Manage Inventory function to track bulk inventory items and other CIs that are available for deployment.

Before you can track inventory, you must:

- Create inventory location CIs.
- Create bulk inventory CIs, or other CIs to be tracked as inventory.
- For bulk inventory, specify the received quantity and the inventory locations.
- For non-bulk inventory CIs, set the inventory status to In Inventory, and select a location.

Note: For instructions on creating CIs, see "Creating a CI" on page 144.

After items are in inventory, you can use the Manage Inventory function to view, relocate, and reserve and use CIs and bulk inventory items.

Viewing inventory locations

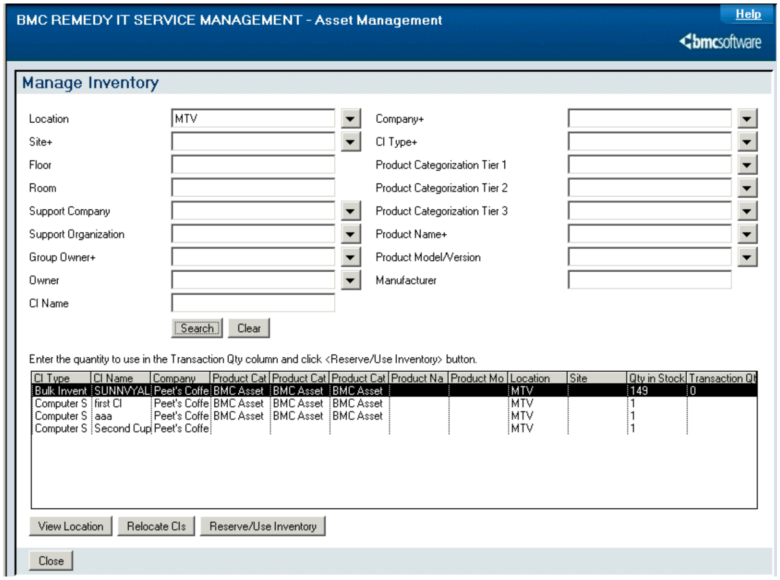
You can view the location of inventory from the Manage Inventory dialog box.

▶ To view inventory locations

1 From the navigation pane in the Problem Management console, choose General Functions > Manage Inventory.

The Manage Inventory dialog box appears.

Figure 8-5: Search results in the Manage Inventory dialog box



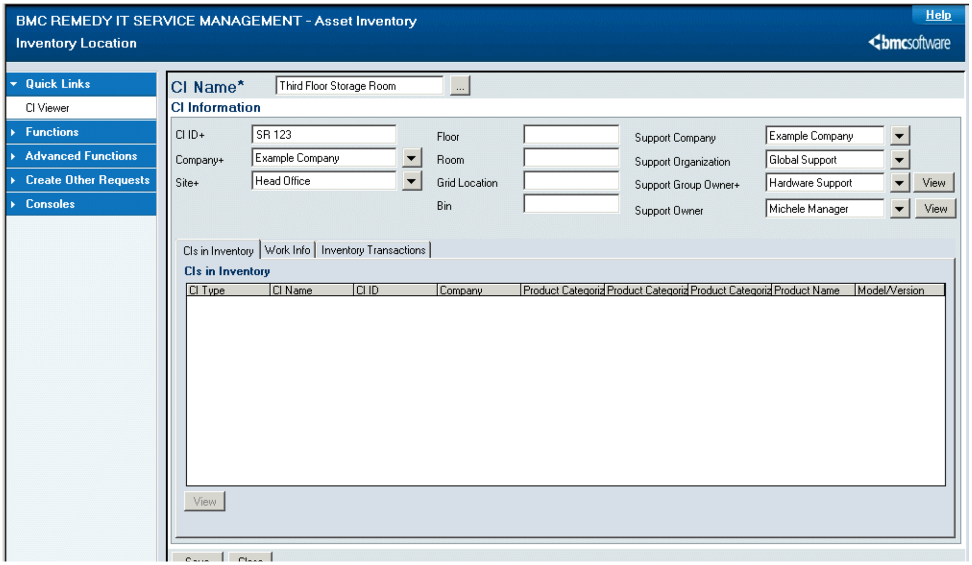
2 Enter your search criteria, and click Search.

Results matching your search criteria appear in the table.

3 Select a CI or bulk inventory item from the table, and click View Location.

The Inventory Location form appears.

Figure 8-6: Inventory Location form



4 View the CIs in the inventory, and then click Close.

Relocating CIs

You can relocate CIs or bulk inventory items from one location to another.

▶ To relocate assets

1 From the navigation pane in the Problem Management console, choose General Functions > Manage Inventory.

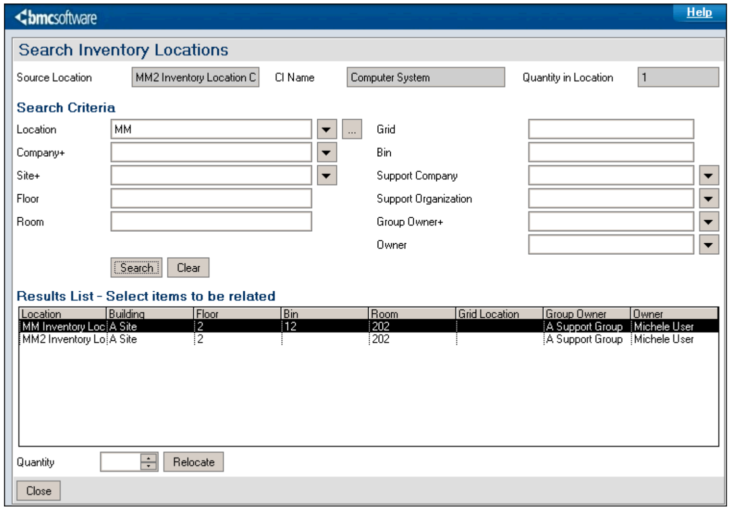
The Manage Inventory dialog box appears.

2 Search for inventory in the current location.

3 Select the CI or bulk inventory item you want to relocate, and click Relocate CIs.

The Search Inventory Locations dialog box appears.

Figure 8-7: Results in Search Inventory Locations dialog box



4 For the location where you want to relocate the CI, specify search criteria, and click Search.

Results matching your search criteria appear in the table.

5 Select the location where you want to relocate your CI.

6 In the Quantity field, enter the number of CIs you want to relocate.

7 Click Relocate.

Reserving and using inventory

You can reserve and use the CIs and bulk inventory items that are in inventory.

▶ To reserve and use inventory

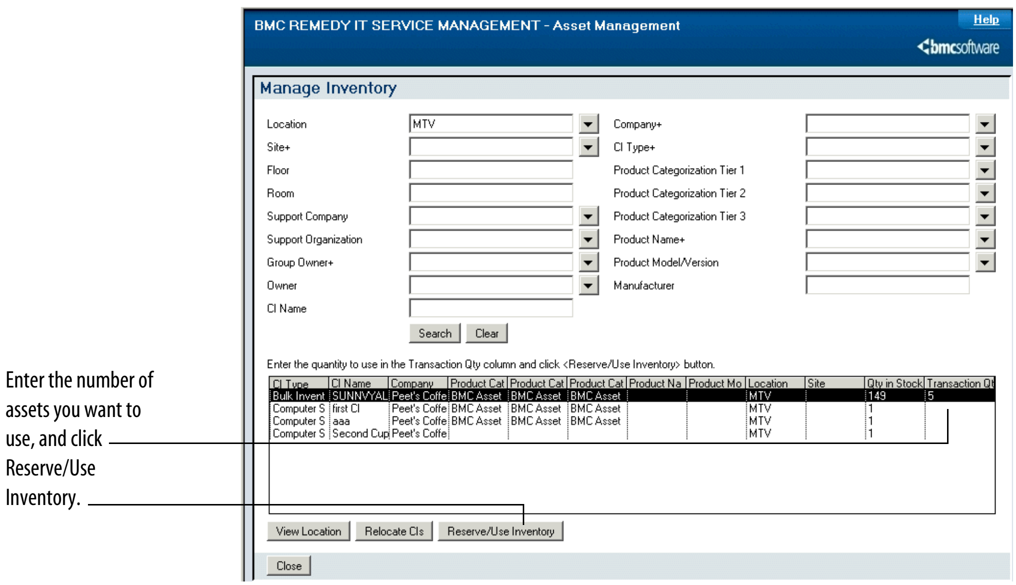
1 From the navigation pane in the Problem Management console, choose General Functions > Manage Inventory.

The Manage Inventory dialog box appears.

2 Select the CI or bulk inventory item you want to reserve and use.

3 Click in the Transaction Qty column and enter the number of assets or bulk inventory items you want to use.

Figure 8-8: Manage Inventory dialog box displaying transaction quantity



4 Click Reserve/Use Inventory.

The number of CIs or bulk inventory items in the Qty in Stock column is reduced by the number reserved and used.

Glossary

This glossary contains terms for all of the ITSM applications.

For a list of AR System terms, see the glossary in the *BMC Remedy Action Request System 7.0 Concepts* guide.

For a list of CMDB terms, see the glossary in *BMC Atrium CMDB 2.0 Concepts and Best Practices Guide*.

accelerated depreciation
: Any method of depreciation that allows greater deductions in the earlier years of a CI's life cycle. See also *depreciation* and *configuration item (CI)*.

access permission
: See *permission group*.

action
: A mechanism, such as an alert or a Set Fields action, for making sure that SLM commitments are met. You can define one or more actions that will be associated with a milestone.

administrator
: See *application administrator*.

Administration console
: See *Application Administration console*.

agreement
: A documented understanding between two parties. An agreement can be one of three types: service level agreement, operational level agreement, or underpinning contract. See also *service level agreement (SLA)*, *operational level agreement (OLA)*, and *underpinning contract (UC)*.

agreement owners
: A feature that allows you to select which individuals or groups of people to notify at certain times, for example, when an SLA is at risk or when an SLA is going to expire.

application administrator
: An individual responsible for the management of the ITSM applications, including setting up forms, setting access rights for users, and creating configurations.

Application Administration console
The main interface for configuring ITSM applications. The console works like a control panel from which administrators can perform common configuration activities and activities specific to different ITSM applications and subsystems.

approval
A process that generates electronic signature lines for items that require approval, and tracks who has approved or rejected a given request.

asset manager
The manager responsible for both strategy and day-to-day CI management functions, for example, updating CIs and configurations, running reports, or negotiating contracts.

assignee
The person assigned the responsibility of working on any of the following activities: change request, incident ticket, problem investigation, known error, solution database entry, and so on.

assignment
Automatically or manually assigning a group or individual the responsibility of resolving an issue or request. ITSM applications use the Assignment form for group automatic assignment and the Assignment Engine for individual automatic assignment.

audit schedule
A schedule used to perform periodic audits that check for differences between the information in the CI database and the CIs that are deployed in the company.

availability service target
A service target that measures the time that an asset or service is available or unavailable. This service target applies specifically to data that is tracked in an application based on AR System, such as Asset Management.

BMC Atrium Configuration Management Database (BMC Atrium CMDB)
An infrastructure built on AR System and used to build data models and define datasets.

book value
The value of a CI equal to the purchase cost minus the accumulated depreciation.

broadcast message
An application feature that enables users to create messages that can be viewed by the entire organization or by users in specific groups.

BSM
See *business service management (BSM)*.

bulk inventory
Assets that you order in quantity, such as power cables.

bulk items
Items that are *not* tracked by an individual record for each unit. Bulk items in inventory are tracked by quantities of an item type. For example, items such as cables do not require individual records but rather, one record for a bulk quantity of the specific cable type.

Bulk Performance Manager Node
A feature that allows the administrator to add multiple nodes to a service target at one time. This feature is specific to collection nodes for BMC Performance Manager. See also *collection node*.

business service management (BSM)
A flexible, comprehensive management approach that links IT resources and business objectives. BSM makes sure that everything IT does is prioritized according to business impact, and enables IT organizations to proactively address business requirements.

CAB
See *change advisory board (CAB)*

CCM
See *Change and Configuration Management*.

change advisory board (CAB)
A group that advises change management on the implementation of significant changes to the IT infrastructure. This group is often made up of representatives from various IT areas and business units.

Change and Configuration Management
An application feature that proactively manages both IT and business-driven changes, and protects the IT environment. It does this by using planning and decision-making data contained in a dedicated BMC Atrium CMDB.

change authority
The name of a group with the authority to approve changes. This group can also be called the Change Advisory Board. See also *change advisory board (CAB)*.

change management
As a concept, the process of planning, scheduling, implementing, and tracking changes to the IT infrastructure, or any other aspect of service, in a controlled manner. By using change management, you can implement approved changes with minimal disruption to the business environment.

change manager
A person responsible for filtering, accepting, and classifying all change requests. The change manager is also responsible for planning and coordinating the implementation of the changes. Sometimes known as a change supervisor.

change request
The controlled process for the addition, modification, or removal of approved, supported, or baselined hardware, networks, software, applications, environments, or systems. A change request can involve multiple change activities.

charge-back
The process of charging departments or cost centers for the IT infrastructure required to support their business processes.

charge-back invoice
A detailed list of charges to cost centers, including any charge-back percentage.

charge-back percentage
A percentage used to calculate charge-back costs.

charge-back report
A report used by a cost manager to track information and find entries that might need to be adjusted.

charge-back summary
The total charges made to cost centers, including charge-back percentage. For split cost centers, it also provides information about how charges are allocated for source cost centers and target cost centers.

CI
See *configuration item (CI)*.

CI browser
A component of ITSM. The CI browser lets you search for and view CIs and their relationships.

CI unavailability
The downtime of a CI.

CI unavailability record
The time when a CI is either partially or completely unavailable to perform its required function. CI unavailability records can be broadcast or related to other records.

class
Metadata in the BMC Atrium CMDB that defines a type of object, usually a configuration item (CI) or relationship.

client tier
The architecture level where AR System clients operate within the multitier system.

CMDB
See *BMC Atrium Configuration Management Database (BMC Atrium CMDB)*.

Reconciliation Engine
A component of the BMC Atrium CMDB. The Reconciliation Engine merges data from different discovery services based on identification and precedence rules.

collection node
The data source for the information that is forwarded to the collection points. Some examples of data sources are BMC Performance Manager Classic, BMC Performance Manager Express, BMC Application Response Time, and SNMP data sources.

collection point
The component in the SLM application that is responsible for collecting the data. You can add multiple collection points with different port numbers.

collector
The component in the SLM application that manages the collection points and retrieves data.

Company field
A field in ITSM that controls multi-tenancy. It shows only data for the companies for which you have permission. See also *multi-tenancy*.

compliance at risk target
A target (such as 99.5 percent) that identifies when the agreement's compliance reaches a point that is nearing a breach state and should be identified as a potential risk. See also *compliance-only service target* and *compliance service target*.

compliance-only service target
A service target that enables you to access data already processed by another product for use in compliance calculations. Using the compliance-only service target, SLM calculates compliance results at the agreement level only, by accessing service target results that were already processed by another application. See also *compliance at risk target* and *compliance service target*.

compliance service target
A target (such as 99 percent) that tracks the performance of the agreement to see the percentage of time the agreement was met over specific time periods. See also *compliance at risk target* and *compliance-only service target*.

configuration
Sets of CIs that are required by different groups of people in the company.

configuration catalog
A feature of Asset Management that stores your standard configurations (such as a standard desktop, laptop, server, and so on) for management purposes.

configuration item (CI)
An infrastructure component or an item associated with the infrastructure that is (or will be) under the control of configuration management, for example, a Request for Change. A CI can be complex or simple, large or small. CIs can include entire systems or be a single module or minor component. CIs can also include records of people (users and customers) and locations.

configuration management
The process of maintaining detailed IT inventory records. It involves identifying and defining the CIs in a system, recording and reporting the status of all CIs and requests for change, and verifying the completeness and correctness of all CIs. See also *configuration item (CI)*.

Configuration Management Database
See *BMC Atrium Configuration Management Database (BMC Atrium CMDB)*.

contract
A documented relationship between two parties that identifies details about each party, accounting and budget codes, purchase cost, and expiration dates, and ties one or more SLAs, OLAs, or underpinning contracts to the interested parties. The contract also makes it possible to segment and restrict access to the compliance and service target results so that results can be viewed by contract.

cost center
An entity tracking cost information within an organization. See also *split cost center*.

cost management
All of the policies, procedures, and deliverables required to fulfil an organization's costing and charging requirements.

currency code
The three-letter code that represents a currency type, such as USD for United States Dollars.

dashboard
Web-based, graphical user interface using flashboards where compliance and service target results can be viewed by service level managers, service delivery managers, other IT professionals, and customers or line of business owners. See also *service level agreement (SLA)*, *service target*, and *flashboard*.

data consumer
An application that works with data in ITSM. It might view the data or modify it. See also *data provider*.

data provider
An application that loads data into ITSM. This is often a discovery application. See also *data consumer*.

dataset
A logical group of data in ITSM. A dataset can represent data from a particular source, a snapshot from a particular date, and so on. The dataset used by BMC products for reconciled production data is named BMC Asset.

decision tree
A step-by-step guide set up by an administrator. It guides the user through a questionnaire and, based on the user's answers, completes part of the form for a new incident.

declining balance depreciation
A method of calculating depreciation in which CIs depreciate at a constant rate per year, accelerated by a factor of 150 percent. In this method of accelerated depreciation, 150 percent of the straight-line depreciation amount is taken the first year, and then that same percentage is applied to the undepreciated amount in subsequent years. See also *double-declining balance depreciation*.

definitive software library (DSL)
A central repository of approved product dictionary entries (PDEs). See also *product dictionary entry (PDE)*.

dependent change request
A change request that must be completed in sequence, as defined by the change manager.

depreciation
The loss of an asset's value resulting from the passage of time.

double-declining balance depreciation
A method of calculating depreciation in which CIs depreciate at a constant rate per year, accelerated by a factor of 200 percent. In this method of accelerated depreciation, double the straight-line depreciation amount is taken the first year, and then that same percentage is applied to the undepreciated amount in subsequent years. See also *declining balance depreciation*.

down CI
A CI out of service for repairs or not working.

DSL
See *definitive software library (DSL)*.

escalation
A workflow component that searches at specified times or at regular intervals for requests matching a specified condition, and performs specified operations on all matching requests. Escalations are generally used to find records that have exceeded desired business rules or processes, and take appropriate action. They run on the AR System server.

federated data
Data linked from a CI in ITSM but stored externally. Federated data might represent more attributes of the CI or related information, such as change requests on the CI.

flashboard
A real-time visual monitoring tool that shows you the state of your service operations, warns you about potential problems, and collects and shows trend data.

form

A collection of fields that represents a record of information in the AR System. AR System administrators can define and change the fields and workflow associated with a form. An AR System application can include many forms.

functional role

A defined role used for notifications and to extend access granted by permission groups.

global

A setting that applies changes or defines certain parameters for all companies in a multi-tenancy environment. See also *multi-tenancy*.

goal

Measurement method that allows you to track the time taken to resolve an issue or track how often an asset or service was available. Goals are used to determine whether service targets are met.

guest user

Users who have not been configured with login information in the People form. Guest users cannot create change requests.

impacted area

Companies, locations, or organizations affected by changes or updates to CIs.

incident

Any event that is not part of the standard operation of a service and that causes an interruption to or reduction in the quality of that service. See also *incident management* and *problem investigation*.

incident management

As a concept, a reactive process typically initiated in response to a customer's call. The primary goal of the incident management process is to restore normal service operation as quickly as possible and with minimum disruption to the business.

incident manager

A person who monitors incident tickets and activities to help plan resources and to identify incident trends. The incident manager also handles assignments.

incident matching

A search process in Incident Management that can be used to search for other incidents, problem investigations, known errors, and solution database entries that share some of the same characteristics as the current incident, such as product categorization.

incident owner

The user who records the incident. This user might differ from the current incident assignee. See also *assignee*.

Information Technology Infrastructure Library (ITIL)

A set of guidelines for the management and provision of operational IT services.

instance

A record in ITSM. An instance is an object of a particular class. Both CIs and relationships are considered instances.

inventory

The quantity of CIs available.

ISO currency code

See *currency code*.

ITIL

See *Information Technology Infrastructure Library (ITIL)*.

key performance indicator (KPI)
A data point used to measure whether performance-monitoring service targets meet their goals. See also *service level agreement (SLA)*.

known error
A problem that has been successfully diagnosed and for which a temporary work-around or permanent solution to the known error has been identified. See also *problem* and *work-around*.

KPI
See *key performance indicator (KPI)*.

life cycle asset management
Managing the life of a CI through its purchase, deployment, and disposal.

maintenance schedule
A schedule used to perform maintenance on CIs.

measurement
The metric by which supervisors measure the ability of the support staff to meet their agreements.

milestone
A point in time that triggers a set of actions as you progress toward an agreement compliance target or service target goal. The triggered actions are to make sure your goals are being met.

multi-tenancy
A feature in ITSM that uses the Company field to limit access by individuals. The Company field can be used to represent a company, department, or other group. The Company field also can be used to control access in a hosted environment. By default, ITSM applications operate in multi-tenancy mode. See also *single-tenancy*.

navigation pane
An area on the left side of consoles that provides links to functionality and links to other programs.

New Request Wizard
A simple form for requesters to submit service requests. Requesters use the New Request Wizard interface to submit service requests to IT, which is the only way to submit a service request from the Requester console.

non-bulk CIs
Stand-alone configuration items, for example, a single server or laptop.

notification
A message sent to a user by workflow. Notification can be in the form of an alert, email message, or other method using integrations.

OLA
See *operational level agreement (OLA)*.

operational catalog
A feature in which operational categories for service requests are defined.

operational categorization
A three-tier hierarchical representation of operations as defined in the Operational Catalog configuration form. This categorization is included in records to specify the range of operations to which a record applies.

operational level agreement (OLA)
An internal agreement used to define and track the level of service provided for an IT organization. An example is an agreement between the network management team and the service desk.

operator
One of a number of functions that enable you to define advanced searches or build qualifications.

Overview console
A central console for ITSM applications. The console works like a control panel from which users can access all assigned work and perform their primary activities.

parent/child contract
A parent, or main, contract that has other children, or subcontracts, associated with it.

PDE
See *product dictionary entry (PDE)*.

peer change request
A dependent change request that can be completed at the same time as another change request.

peer-to-peer
Devices that are on the same level in an organization's network (for example, two workstations). See also *notification*.

performance-level service target
A service target that compares a service level to the goals defined in the service target to determine whether the goal is met. Allows you to monitor whether a critical application that you are using has responded within the time period specified in the goals. See also *goal*.

performance-monitoring service target
A service target that compares a goal to a defined threshold to determine if the goal is met. For example, it allows you to monitor whether a critical application that you are using responds within 4 seconds or if the application meets other criteria such as being in a state of "OK."

permission group
A feature of the ITSM applications that controls what areas of the application a users can access. Each permission group can access only certain areas of the application. A user can belong to more than one permission group.

problem
The root cause of an incident or potential incident. After a resolution or work-around is identified, the problem becomes a solution database entry or known error. See also *incident*, *known error*, *solution database*, and *work-around*.

problem investigation
A process that helps an IT organization diagnose the root cause of incidents and potential incidents. It initiates actions that help to improve or correct the situation, preventing the incident from recurring.

problem management
As a concept, a process that identifies the cause of problems and initiates actions that help to improve or correct the situation, preventing an incident from recurring or occurring in the first place. The cause identified by a problem investigation can be documented in a known error or solution database record. See also *incident*, *known error*, *solution database*, and *problem*.

problem manager
A person who reviews problem investigations and known errors to maintain the quality and integrity of the problem management process. This person coordinates the assignment of problem investigations and known errors to support staff, and also reviews problem investigation requests and performs business impact analysis.

process flow

Shows the progress of a request as it moves through the stages of its life cycle. It does this within a form, such as an incident request. A diagram shows the stages of the process, as indicated by best practices, rooted in ITIL processes. It indicates the current stage and state of the request. The process flow diagram also serves as a wizard, guiding the user through the life cycle.

product categorization

A five-tier hierarchical representation of products as defined in the Product Catalog configuration form. This categorization is included in records to specify the range of products to which the record applies.

product dictionary entry (PDE)

An entry in the Definitive Software Library that represents the master name of a software application. See also *definitive software library (DSL)*.

push field

An advanced action that allows you to push information from the "Applies To" form for which you are creating an SLA to another form on the same server. See also *service level agreement (SLA)*.

reconciliation

A feature in Asset Management that checks for duplicate CI records and enables the user to delete one and keep the other.

registered user

A user who has an entry in the People form with an AR System login ID.

relationship

A type of BMC Atrium CMDB class that defines the relationship between two CIs.

reminder

A message similar to an AR System notification, except that you can define the content of a reminder and specify when to send it.

request-based service target

A service target that measures how long a process takes, such as the time to respond to or resolve a service desk request, or the time to respond to or resolve a change request.

requester

A person in the organization who needs assistance from the IT support staff. A requester is usually an employee in the organization who needs to have a change implemented or an incident resolved.

Requester console

The front end for the Change Management and Incident Management applications. It provides an easy, user-friendly interface that allows users to quickly submit requests for change or incidents to the two back-end applications, and to view their submitted requests.

residual value

The value you can purchase an item for after its lease expires.

return on investment (ROI)

A method of calculating when the capital cost of implementing a project, product, or service will be recovered through the savings that result from completing the activity. The ROI can be expressed in terms of internal savings, increased revenue from external sources, or some combination of these types of savings. See also *service level agreement (SLA)* and *service level management (SLM)*.

review period
A period of time over which the compliance of an agreement is monitored on a regular basis. The following review periods are provided in SLM: Daily, Weekly, Monthly, and Quarterly. For example, if a Monthly review period is added to a service level agreement, then the SLA's compliance target needs to be met on a monthly basis. If a Daily review period is also added, then the SLA's compliance target needs to be met on both a daily basis and a monthly basis. See also *service level agreement (SLA)* and *service level management (SLM)*.

ROI
See *return on investment (ROI)*.

role
A set of responsibilities, activities, and authorizations, usually within the context of a single application or a business system.

Note: Access to Remedy ITSM applications is based on user roles. Depending on your role in the organization—requester, support, management—you work with a different application (or view) on your desktop.

root cause
The underlying cause of an IT-related problem experienced by a customer.

row level locking
See *multi-tenancy*.

salvage value
The estimated value that a CI will realize at the end of its useful life. See also *useful life*.

script
Detailed instructions that have been set up by an administrator to prompt users with questions that can assist in resolving or assigning an incident.

service catalog
A list of IT services, default levels, and options.

service level agreement (SLA)
An agreement between a service provider and its customers or lines of business that formally documents the needs of the customer and makes sure the correct level of service is received from the service provider.

service level management (SLM)
As a concept, the continuous and proactive process of defining, agreeing, monitoring, reporting, and reviewing the performance of IT services to make sure that adequate levels of service are delivered in alignment with business needs and at acceptable cost.

service manager
A manager who uses Asset Management to create service objects used for interpreting business problems, for example, cost of unavailability of services to a business area.

service request
A request for service to the IT organization. Service requests can be requests for change or requests to resolve incidents that impact the user.

Service Request console
See *Requester console*.

service target
The individual level of service to achieve. A service target includes terms and conditions, goals, costs, and milestones. Examples of service target goals include incident resolution time of 30 minutes, application response time of 4 seconds, and an application being in a state of "OK." See also *availability service target*, *performance-monitoring service target*, *request-based service target*, and *compliance service target*.

set field
An advanced action that allows you to pull information from other forms to set in the form for which you are creating the agreement.

single-tenancy
A feature that allows selection of a default company for company fields in ITSM. Single-tenancy mode is required to give unknown users access to the ITSM Requester console. See also *multi-tenancy*.

SLI
See *software library item (SLI)*.

SLM
See *service level management (SLM)*.

software library item (SLI)
The physical storage locations of the master copy of a software application and its versions.

software license compliance
Keeping track of what software your company has and that it has the legal right to use it.

solution database
A repository that stores reusable solutions to customer product problems in an easy-to-retrieve format.

solution entry
A reusable solution to a customer product problem. This is stored in the solution database.

split cost center
A cost center that enables a department to split its costs with other departments. For example, a project management group might split its costs with an engineering department and a sales department. The project management department would be a split cost center, and the engineering department and sales department would be target cost centers.

straight-line depreciation
A method of calculating depreciation in which CIs depreciate at a constant value per year. The annual depreciation is calculated by subtracting the salvage value of the CI from the purchase price and then dividing this number by the estimated useful life of the CI.

submitter
A person who reports a problem, makes a request, or enters information into a database. See also *change request*.

submitter group
One of several special access control groups that the AR System provides. Users automatically belong to this implicit group for requests they have submitted. See also *assignee*.

sum-of-the-year's digits depreciation
A method of calculating depreciation in which CIs lose more of their value early in their lifetime. This method of calculating depreciation of a CI assumes higher depreciation charges and greater tax benefits in the early years of a CI's life.

task

A unit of work that needs to be completed as a step in implementing an incident or problem investigation. In the Change Management application, you can also group a number of activities for requests with a number of actions that need to be completed before the request can be resolved. Your administrator creates task templates and task group templates that you can reuse for the same types of requests. Tasks can be manual or automatic.

task management system (TMS)

A sub-system that is used to create task templates and task group templates. Besides the ability to set up predecessor-successor relationships, TMS supports branching and multiple task paths as well as the data exchange between activities.

TCO

See *total cost of ownership (TCO)*.

template

1. A set of predefined criteria or settings that can be used by many agreements or service targets. See *also service level agreement (SLA)*.

2. A form set up by an administrator that a user can select to complete an incident ticket or a change request with information consistent with the user's support group and the type of incident or change request.

terms and conditions

The conditions that specify whether a service target should take effect. For example, the terms and conditions could specify that the service target applies only to incidents in which the priority is urgent and the service is email. Or the service target applies only to a specific set of KPIs. See also *service target*.

time-based service target

A service target that measures the time taken, for example, to resolve an incident from the time the incident was reported to the time it was resolved. Any time that falls within the "Exclude when" qualification is ignored and not measured.

TMS

See *task management system (TMS)*.

topology

The pattern of links connecting pairs of nodes of a network.

total cost of ownership (TCO)

A method of calculating all expenses associated with a CI over its lifetime. The calculation considers depreciation, maintenance, staff costs, accommodation, and planned renewal.

UC

See *underpinning contract (UC)*.

underpinning contract (UC)

A contract that is used to track performance against prearranged goals that the IT organization has with an external service provider or supplier.

useful life

The number of years that a depreciable CI is expected to be in use.

wildcard

A character that users can type to represent other characters in a search. For example, in search statements in character fields, users can specify wildcards to match single characters, strings, or characters within a range or set.

work info

A record describing work performed.

work-around
A temporary resolution to an incident, problem, or known error.

workflow
The automated set of business processes used to run a company.

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