BMC Service Request Management 7.6.04

User's Guide

January 2011

www.bmc.com

Contacting BMC Software

You can access the BMC Software website at `http://www.bmc.com`. From this website, you can obtain information about the company, its products, corporate offices, special events, and career opportunities.

United States and Canada

Address	BMC SOFTWARE INC 2101 CITYWEST BLVD HOUSTON TX 77042-2827 USA	Telephone	713 918 8800 or 800 841 2031	Fax	713 918 8000

Outside United States and Canada

Telephone	(01) 713 918 8800	Fax	(01) 713 918 8000

If you have comments or suggestions about this documentation, contact Information Design and Development by email at `doc_feedback@bmc.com`.

Customer Support

You can obtain technical support by using the Support page on the BMC Software website or by contacting Customer Support by telephone or email. To expedite your inquiry, please see "Before Contacting BMC Software."

Support website

You can obtain technical support from BMC Software 24 hours a day, 7 days a week at `http://www.bmc.com/support`. From this website, you can:

- Read overviews about support services and programs that BMC Software offers.
- Find the most current information about BMC Software products.
- Search a database for problems similar to yours and possible solutions.
- Order or download product documentation.
- Report a problem or ask a question.
- Subscribe to receive email notices when new product versions are released.
- Find worldwide BMC Software support center locations and contact information, including email addresses, fax numbers, and telephone numbers.

Support by telephone or email

In the United States and Canada, if you need technical support and do not have access to the Web, call 800 537 1813 or send an email message to `customer_support@bmc.com`. (In the Subject line, enter `SupID:<yourSupportContractID>`, such as `SupID:12345`.) Outside the United States and Canada, contact your local support center for assistance.

Before contacting BMC Software

Have the following information available so that Customer Support can begin working on your issue immediately:

- Product information

    — Product name
    — Product version (release number)
    — License number and password (trial or permanent)

- Operating system and environment information

    — Machine type
    — Operating system type, version, and service pack
    — System hardware configuration
    — Serial numbers
    — Related software (database, application, and communication) including type, version, and service pack or maintenance level

- Sequence of events leading to the problem

- Commands and options that you used

- Messages received (and the time and date that you received them)

    — Product error messages
    — Messages from the operating system, such as `file system full`
    — Messages from related software

License key and password information

If you have a question about your license key or password, contact Customer Support through one of the following methods:

- Email `customer_support@bmc.com`. **(In the Subject line, enter** `SupID:<yourSupportContractID>`, **such as** `SupID:12345`.**)**

- In the United States and Canada, call **800 537 1813**. Outside the United States and Canada, contact your local support center for assistance.

- Submit a new issue at `http://www.bmc.com/support`.

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Preface

This guide describes how to use BMC Service Request Management 7.6.04. This application runs on the BMC Remedy Action Request System (BMC Remedy AR System) platform and consumes data from the BMC Atrium Configuration Management Database (BMC Atrium CMDB).

BMC Service Request Management provides a consistent user interface where users can request a service or report an incident. Users or service desk staff can select services that IT or other departments support from a service catalog that the business service manager sets up.

BMC Service Request Management works with other applications, such as BMC Remedy Incident Management and BMC Remedy Change Management, to resolve user requests. BMC Service Request Management manages the entire process, from submission to completion.

This guide is for:

- Users, who select services from the service catalog and initiate service requests.
- Business service managers, who approve requests and run reports.
- Service request coordinators, who plan, coordinate, and track service requests.
- Fulfillment providers, who complete their tasks in the fulfillment application and update their task status in their specific applications.
- Administrators, who communicate with users by sending notifications and broadcasting messages.

BMC Service Request Management documentation

The following table lists the documentation available for BMC Service Request Management.

Unless otherwise noted, online documentation in Adobe Acrobat (PDF) format is available on product installation DVDs, on the Customer Support website (`http://www.bmc.com/support`), or both. You can order printed documentation from the Customer Support website.

— **NOTE** —————————————————————————

To access the Customer Support website, you must have a support contract.

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

Title	Document provides	Audience
BMC Service Request Management Release Notes	Information about new features and known issues.	Everyone
BMC Service Request Management Installation Guide	Procedures for installing the application.	Administrators
BMC Service Request Management Administration Guide	Procedures for administrating and configuring the application. Replaces the separate administrator's and configuration guides that were provided for previous releases of the application.	Administrators
BMC Service Request Management 7.6.00 Troubleshooting Recommendations white paper	Assistance in troubleshooting some of the common issues that may occur while installing and implementing BMC Service Request Management 7.6.00.	Administrators
BMC Remedy Action Request System Configuration Guide	Procedures for configuring BMC Remedy Action Request System.	Administrators
BMC Remedy Action Request System BMC Remedy Mid Tier Guide	Information about configuring the mid tier, setting up applications for the mid tier, and using applications in browsers.	Administrators
BMC Remedy IT Service Management Configuration Guide	Information about configuring AR System servers and clients, localizing, importing and exporting data, and archiving data.	Administrators
BMC Remedy Knowledge Management User's Guide	Procedures for using BMC Remedy Knowledge Management.	Users

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1 Using the Request Entry console

The Request Entry console serves as the front-end for the service catalog. You can use this console to view available services, and submit and view your requests.

The following topics are provided:

- About the Request Entry console (page 10)
- Submitting a service request (page 12)
- Creating requests on behalf of other users (page 19)
- Filling out the service survey (page 20)
- Making suggestions (page 21)
- Setting Request Entry console preferences (page 21)
- Configuring the application for accessibility users (page 22)

About the Request Entry console

The Request Entry console (Figure 1-1) provides an easy-to-use user interface in which you can:

- Search the service catalog
- Create, view, update, or cancel your service requests
- View the status of your service requests
- Enter requests on behalf of other users

Figure 1-1: The Request Entry console
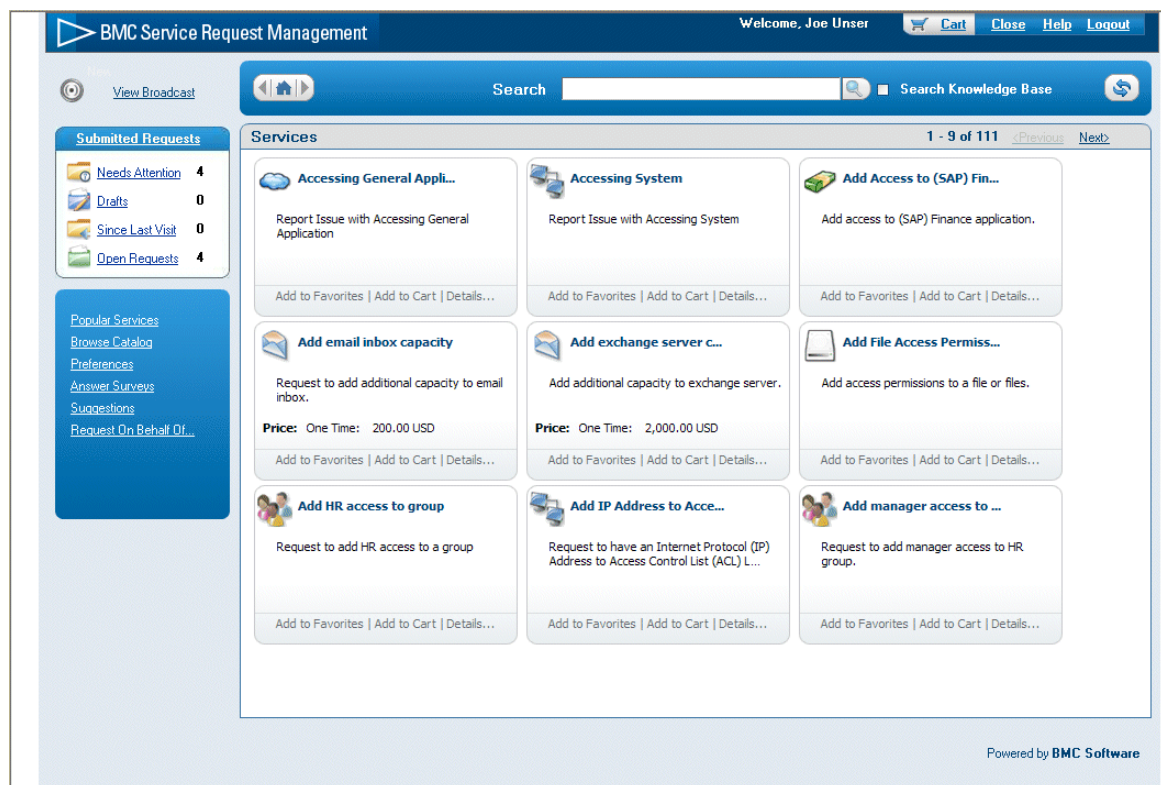
In addition, the Request Entry console shows the most popular service requests to reduce the time that you spend browsing the service catalog.

The Request Entry console uses a cart, similar to many e-commerce websites, so that you can add multiple service requests to the cart and submit them in a single operation.

If your company uses the BMC Cloud Lifecycle Management solution, a My Cloud Services Console link on the left navigation pane allows you to launch the cloud life cycle management console.

— NOTE —————————————————————————————————

If pop-up blocking is enabled for your browser, some features in the Request Entry console will not function. To enable use of all features of the application, disable pop-up blocking or modify the pop-up blocker settings to add the BMC Remedy AR System Mid Tier web server to the exception list.

Popular Services view of the Request Entry console

The Request Entry console opens with the Popular Services view. Using the Popular Services view, you can select one of the most popular services (both personal and system) with a single click. To locate a service that is not shown in the Popular Services view, use the Search field to search for the service, or click an icon in the toolbar near the top of the form to see the service requests by category.

The Popular Services view lists services in the following order:

- Services you added as favorites, shown alphabetically.

- Services specified by the application administrator, shown alphabetically.

- Services added automatically, based on how many times users request the service during the most recent period of time. The maximum number (default is 10) and the length of the time period (default is a week) is configurable by the application administrator. The most requested services are shown first.

User scenario

Suppose that you must print presentation materials to distribute in an important meeting to be held in two hours, and the printer stops working.

If the optional BMC Remedy Knowledge Management application is available, you open the Request Entry console and search for articles in the knowledge base. If you find a solution to your printer problem, you do not need to open a service request.

If you do not have the BMC Remedy Knowledge Management application installed or you do not find a solution in the knowledge base, you use the Request Entry console to search for a service. In the service catalog under the Hardware category, you find the service you need. For this service, IT has a service target to fix a printer in one hour, charged at a cost of $100 to your department.

You select the service, enter the required information, and submit the request. Because your application administrator configured the application so that you receive an email notification when the request is assigned, you are alerted when a service desk technician is assigned to work on your request.

Again in the Request Entry console, you view your submitted request and see that its status is In Progress.

When the service desk technician enters information indicating that the printer is fixed, you receive email notification alerting you to that effect, and you resume printing your materials. You receive an email notification asking you to fill out a survey, indicating how you rate the response to your request.

Submitting a service request

The process of requesting a service consists submitting the service request and, optionally, using a cart to combine services into a single request.

— *NOTE* —————————————————————————

If BMC Remedy Knowledge Management is available, you can search for a knowledge base article that might help you resolve your problem. For more information, see "Searching for knowledge base articles" on page 14.

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▶ **To submit a service request**

1 Use one of the following methods to find the service to request from the Request Entry console. Click the Next and Previous buttons (if shown) to view all the available requests.

- Review the popular services shown to see if the service you want is listed on the initial page. Click Next to see more services.

  For each service that appears you can also click:

  Add to Favorites or **Remove Favorite**—To add or remove the service from your favorites list. Your favorites appear first in the Popular Services view of the Service Request Console.

  Add to Cart—To add the request to a cart, to submit multiple requests at once. See "Using the cart" on page 13.

  Details—To see more information about a request before requesting it.

- Enter a search term, and click the magnifying glass.

  For example, if your printer ran out of toner, enter `toner cartridge`, `color printer`, or `printer`. Your Service Catalog Manager might have added keywords to simplify your searches.

- Click an icon for a category near the top of the form, or click the Browse Catalog link on the left navigation pane, and then select a category. If a category has a Browse Subcategories link, you can click it to see the subcategories instead of all the services in the category.

2 Click the icon or the name of a request to request it.

— *NOTE* —————————————————————————

If you clicked the Details link for the request, click Request Now or Add to Cart from the Service Review page.

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3 Provide the following information for the service request as needed:

- Edit the requester details (for example, your phone number and email address).

- Enter the date when you need the service finished.

- Include an attachment, such as an illustration of an office layout or a spreadsheet containing part numbers of items that you need.

- Answer any questions that have been provided.

To use custom date formats in answers to questions in service requests, users must enter the custom date/time format on the Locale tab on the AR System user Preferences form. (The administrator can also set the date format.) Both date and time must be included and separated by a semicolon:

date; time

For example:

`yyyy/MM/dd; HH:mm`

> **NOTE**
> Attachments to Work Info entries in a service request are not transferred with information sent to another application, such as an incident, a change request, or a work order. You can access the attachments only from the service request. Similarly, attachments added in other applications (except public work info attachments) are not transferred to BMC Service Request Management.

4 Click Submit, or click Add to Cart. See "Using the cart" on page 13.

> **NOTE**
> If you are not sure you have all the needed information, click Save as Draft. The request appears in the list of service requests in Draft mode.

Using the cart

In the cart, you can combine multiple service requests, and submit them in one operation. For example, you might decide to create requests for two services at once: fix your printer *and* upgrade your computer to the latest version of Microsoft Office.

> **NOTE**
> You can open only one cart a time. Also, the cart is not available to guest users.

▶ To use the cart

1 From the Request Entry console, locate a service to request.

2 On the service's description, click Add to Cart.

The Cart Review window shows information for each item in your cart.

3 To change the name of the cart to a more meaningful description (for example, `Allen's cart`), click Update Name.

The cart name defaults to the cart request ID. You can modify the cart name, but you cannot modify the cart request ID.

The Ready column in the Cart Review table shows any requests that require attention. You must update requests that need attention *before* you can submit the cart.

4 To modify information in your request (for example, to change the expected date, modify your answers to questions, or supply missing information), click Update Request.

5 Continue adding or removing services.

The cart is ready to submit when you see the green checkmark in the "Your cart is ready" area of the window.

6 To create the service request, click Submit Cart.

The system creates a new cart request ID (for example, CR0000000000003). The new cart submission appears as a single request in the Request Entry console. You can view it to see the status of your request.

Searching for knowledge base articles

If BMC Remedy Knowledge Management was installed with BMC Service Request Management, you can search for knowledge base articles from the Request Entry console in either of the following ways:

- **Using a knowledge base article to fix your problem**—Search the knowledge base for articles that might help you resolve your problem. If you find an article that contains a solution that you can follow to fix your problem, you do not need to submit a request.

- **By submitting a request with attached knowledge base articles**—Search the knowledge base for articles that might help you resolve your problem. If you find articles that relate to your problem but do not fix the problem, then submit the request or search for services in the Request Entry console. If you chose to report an issue, the request generates an incident request that includes the articles you viewed, assisting in quicker resolution of your problem. The service desk will see the articles you viewed to try to solve the problem.

Using a knowledge base article to fix your problem

The following procedure describes how to search for knowledge base articles, and then use a knowledge base article to fix your problem.

▶ **To use a knowledge base article to fix your problem**

1 Open the Request Entry console from a browser.

2 From the Request Entry console, select the Search Knowledge Base check box that is located beside the Search field.

3 Enter search terms in the For field (for example, `Printer` or `Pr%`), and click the magnifying glass.

4 In the BMC Remedy Knowledge Management window, review the search results.

You can refine your search criteria in the Advanced Search pane, and run the search again.

5 In the Search results list, click the Title of any article to view it.

6 If you find an article that you can follow to fix your problem, click the Use button.

7 If you do not find an article that you can follow to fix your problem, perform the following procedure.

Submitting a request with attached knowledge base articles

If you do not find an article that you can follow to fix the problem yourself, the following procedure describes how to search for knowledge base articles, and then submit a service request with attached knowledge base articles.

▶ **To submit a request with attached knowledge base articles**

1 Open the Request Entry console from a browser.

2 From the Request Entry console, select Knowledge Base in the Search field.

3 Enter search terms in the For field (for example, `Printer` or `Pr%`), and click the magnifying glass.

4 In the BMC Remedy Knowledge Management window, review the search results.

You can refine your search criteria in the Advanced Search pane, and run the search again.

5 In the Search results list, click the Title of any article to view it.

The articles you view will be attached to the request you will be submitting. The list of articles you view enables the service desk to see which relevant knowledge entries were viewed before you submitted the request.

6 After viewing the articles, click one of the following buttons:

Report an Issue—Enables you to submit an incident with list of articles you view so the service desk can see which relevant knowledge entries were viewed before you submitted the request.

The SRM RKM Integration dialog box appears, with articles you selected shown in the Knowledge Base Relationship table.

In the Issue Information area, enter the information needed to create the request, and click Submit Request.

Search for Services—Shows service requests that match the search criteria you specified.

Using the Request Entry console to manage service requests

The Request Entry console provides two default searches—by the status of the service request or by its cart request ID—so that you can quickly view service requests in various stages. For example, click the Open Requests link to view your open requests, or click the Needs Attention link to show only those requests that require your attention.

You can use the Show field or the Service Cart field in the Request Entry console for different views of your service requests.

Use the Service Cart field to view your service requests by their cart request ID or name. When you select a cart request ID or name, its related service requests appear. If you clear the Service Cart field, the display preference is used (for example, All Open Requests).

Viewing your service requests

You can review a list of your service requests, a summary of their details, the activity log, and their status levels. You can view requests by selecting the status from the Show field (for example, All Open Requests).

In addition, each entry shown in the table of requests shows its relative status in the status bar.

▶ To view service requests

1   From the left navigation pane of the Request Entry console, click a link in the Submitted Requests area:

- Needs Attention
- Drafts
- Since Last Visit
- Open Requests

2   Select a service request.

The table and status bar summarize details about the service request (for example, the service coordinator, if the request has been approved, its expected finish date, and so on).

3   Click Request Details.

The form appears in Details mode. You can view information about the service request (for example, its request ID, its status, submit and required dates, and so on).

4 (*optional*) To view the processes behind the service request, click the Process View tab.

> *— NOTE —*
>
> To see the Process View tab, the End User Process View option must be selected for the SRD, or you must have SRM Administrator, Request Catalog Manager, or Service Request User permission. See the *BMC Service Request Management Administration Guide.*

5 To view properties for the service request, such as the process step and the fulfillment details, click one of the objects in the process detail window.

If you have the proper permission, and the backend request was submitted successfully, the request's ID appears as a link that opens the backend request.

For information about troubleshooting the service request, see the *BMC Service Request Management Administration Guide.*

Viewing current approvers

If the Request Catalog Manager has configured the service request definition to allow users to view the current users for their requests, you can view the current approvers.

▶ **To view current approvers**

1 From the left navigation pane of the Request Entry console, click a link in the Submitted Requests area:

- Needs Attention
- Drafts
- Since Last Visit
- Open Requests

2 Select a service request that has a status of Waiting Approval.

3 Under the Current Approvers heading, click the More Info link.

The Approvals tab on the Request Details form appears and lists the current approvers.

4 Use the Show list to filter the approvers you see.

Adding an entry to the activity log

When you are viewing your service requests in the Request Entry console, you can add summary information or an attachment to the activity log to provide more information about the service request.

▶ To add an entry to the activity log

1 In the left navigation pane of the Request Entry console, click the Open Requests link.

2 Select a service request from the list.

3 Enter text in the Notes field.

4 To add an attachment, perform the following steps:

   a Click the folder next to the Attachment field.

   b From the Add Attachment dialog box, browse for an attachment.

   c Click OK.

      You can add only one attachment for each activity record, but the service request can include multiple activity records.

      To clear an attachment that you just added, click the Remove File icon ( ).

5 Click Add.

The activity log entry is added to the service request.

Reopening service requests

When the fulfillment provider successfully finishes the request fulfillment process, the service request automatically reaches the Completed status. If your request has been completed (or rejected) but the service is incomplete, you can reopen it from the Request Entry console.

You can also reopen a service request from a survey. (For more information, see "Filling out the service survey" on page 20.) You *cannot* reopen a service request after it reaches the Closed status. Service requests with a status of Completed are automatically closed after 15 days.

─── *NOTE* ───────────────────────

When you reopen a service request, the original request is reopened in the fulfillment application if possible, or a work order is created, depending on how your administrator configured your system. For more information, see the *BMC Service Request Management Administration Guide*.

▶ **To reopen a service request**

1 From the Show field on the Request Entry console, select Closed Requests.

— *TIP*
For a more narrowly defined search, select Recently Closed Requests or Requests Closed Since Last Login.

2 Select a request that has been rejected or completed.

3 Click Reopen, and click Yes.

4 On the Request Work Info form, add summary information, notes, and attachments as needed.

5 Click Save.

If you are re-opening a rejected service request, its status changes to Draft.

If you are re-opening a completed service request, its status changes to Planning.

6 From the Show field, select All Open Requests, or click Open Requests in the left navigation pane.

7 If your original request was rejected, select the re-opened request, and click Complete Request.

8 On the Provide Information screen, enter the required information, and click Submit.

The status changes to Waiting Approval.

Creating requests on behalf of other users

You can create requests on behalf of other users *if* your administrator set up an "on-behalf-of" rule for you. You might create requests on behalf of other users in emergencies or unusual circumstances. For example, if someone in your department cannot create a service request (perhaps a co-worker's computer is not working or a co-worker is on vacation and needs a service performed), you can create a request on the other user's behalf.

Users who are allowed to submit requests on behalf of another user:

■ Must be assigned a fixed or floating license so that they can manage the requests after submitting them on behalf of the other user.

■ Cannot manage a cart for another user.

▶ **To create requests on behalf of other users**

1 Open the Request Entry console.

If you have proper permissions, the Request Entry console contains a link where you can create requests on behalf of other users.

2 From the left navigation pane, click Request On Behalf Of.

3 From the On Behalf of Selection form, enter search criteria, and click Search.

4 From the list of available users, choose a name, and click Select.

5 Create a service request.

When you act on behalf of another user, your view of the Request Entry console is as if that user is logged in to the system. You see their open requests, their most popular services, and so on.

6 When you finish, click On Behalf Of Self.

The Welcome message in the Request Entry console returns to its default mode.

Filling out the service survey

You are notified through email to respond to a survey after your service request is marked Completed. Each service request generates a separate survey.

—— *NOTE* ————————————————————————————————————
Surveys must be configured for your company and the option must be selected. If surveys are not set up and the survey option is not selected, no surveys are generated.
——

▶ **To respond to surveys**

1 From the left navigation pane of the Request Entry console, click Answer Surveys.

2 Select a survey, and click Respond.

3 Enter your responses to the questions.

4 Perform one of the following actions:

- Click Close the Service Request to save your answers to the survey and complete the service request.

- If you are not satisfied with the actions performed on the service request, click Reopen the Service Request. (For more information, see "Reopening service requests" on page 18.)

—— *NOTE* ————————————————————————————————————
You *cannot* reopen a service request after it reaches the Closed status. Service requests with a status of Completed are automatically closed after 15 days.
——

- Click Submit.

Work info is added to the service request.

Making suggestions

You can offer suggestions to the service request coordinator about the Request Entry console and the implementation of the application.

▶ **To make suggestions**

1 From the left navigation pane of the Request Entry console, click Suggestions.

2 From the Suggestions form, select a category for your suggestion (for example, Common Requests or Metrics).

3 Enter the Title and the Suggestion to create your suggestion.

— *NOTE* —————————————————————————————
If you are suggesting a new service, enter a suggested title and description.
————————————————————————————————————

4 Click Save.

5 To view your suggestion, click the Previously Submitted Suggestions tab.

Setting Request Entry console preferences

You can modify the default appearance of the consoles you have permissions to access.

When the Request Entry console opens, you can determine:

■ Default console settings, which you can use to determine the console view that appears initially (for example, Submitted Requests).

■ Display of service requests (for example, All Open).

■ Requests closed since the last time you logged in to the Request Entry console.

— *NOTE* —————————————————————————————
Guest users cannot set Request Entry console preferences.
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▶ **To set the Request Entry console preferences**

1 From the Request Entry console, click Preferences.

2 From the Submit Confirmation list, select the option you prefer:

■ Yes—A confirmation dialog box will appear when you submit a request.

■ No—A confirmation dialog box will not appear when you submit a request.

3 From the Initial Console View field in the General Console Information area, select whether you want the Popular Services, Service Categories, or Submitted Requests view to appear when the Request Entry console opens.

The default setting is Popular Services. When you click the Home button in the Request Entry console, you return to the view that you specify here. If there is no setting, the Home link returns you to the Popular Services view.

4 Modify the *default* search criteria for My Requests when the Request Entry console appears:

a From the Show field, select whether service requests with a particular status should appear.

For example, you might want to view only service requests with a draft status. The default setting is All Open Requests.

b From the Recently Closed field, select the number and unit criteria for requests closed since you last logged in.

For example, you might want to view requests that were closed in the last five days. If you are an infrequent user, you can enter a higher number (for example, requests closed in the last two weeks or months).

5 In the Broadcast Auto Popup field, specify one of the following defaults:

- Never—You never see the broadcast warnings.
- On Console Open—You see the broadcast warnings when the console opens.
- On New Broadcast—You see the broadcast warnings *only* when there is a new broadcast.

6 Click Save.

You must close and reopen the Request Entry console for the changes to appear.

Configuring the application for accessibility users

Accessibility readers can use keyboard and screen-reading software, such as the JAWS for Windows screen reader from Freedom Scientific, to read the Request Entry console.

▶ **To set accessibility options**

1 From a browser or BMC Remedy User, open the AR System User Preferences form.

2 Click the Accessibility tab.

3 In the Accessibility section, choose the following accessibility options:

- Accessible Mode - Screen Reader / No Vision
- Accessible Message - All Actions

Chapter

2 Using the Business Manager Console

The Business Manager Console is used to manage user requests. This console can be used to monitor the current number of open and late requests, run request reports, and examine request trends.

> ___ **NOTE** ___
> To access the Business Manager Console, you must have the Business Manager permission. For information about permissions, see the *BMC Service Request Management Administration Guide*.

The following topics are provided:

- About the Business Manager Console (page 24)
- Viewing request details (page 26)
- Adding work information to a service request (page 27)
- Setting Business Manager Console preferences (page 27)

About the Business Manager Console

The Business Manager Console provides a dedicated workspace for managing service requests. Use this console to search for available service requests. The top part of the console enables you to specify search criteria, while the Search Results table shows service requests in different states (for example, Pending Approval), based on your query.

After you perform your search, the results appear in the Search Results table. When you select a service request, an abbreviated list of details appears in the Service Request Summary.

From BMC Remedy User, if more service requests exist than the system can show in the table, place the cursor in the table, right-click, and choose Next or Prev to see more service requests. From a browser, use the arrow keys at the top of the table.

You can also use the Search Criteria filter at the top of the Business Manager Console to filter which service requests you see:

Region	Region affected by service request (for example, North America)
Site Group	Site group affected by service request (for example, Northwest)
Site	Site affected by service request (for example, Seattle)
Status	State of service request (for example, Draft or In Progress)
Category 1	Top-level category of service request (for example, Software)
Category 2	Second-tier category (for example, Browser)
Category 3	Third-tier category (for example, Microsoft Internet Explorer)
Search button	Performs a search after you define your criteria
Clear button	Removes all search criteria
Default button	Resets search criteria to their default settings

Viewing status overview information

The flashboards on the console graphically show information to help you monitor service requests. They provide an overview of the current state of all service requests (as percentages).

▶ **To view status overview information**

1 From the Business Manager Console, view the status of service requests in the diagram.

The console includes the following flashboards:

- Open Requests—Shows all open service requests.

- Late Requests By Category—Shows all late service requests by their Category 1 level.

These flashboards provide key metrics associated with service requests occurring in the organization. The Business Manager Console uses BMC Remedy Flashboards to provide business managers with important data points and key metrics in a graphic and numeric format. They help monitor service requests so you can make sure your organization is meeting its identified goals. The flashboards provide you with a mechanism for organizational improvement.

2 (*optional*) Set the "Apply search criteria?" option to Yes.

When you select this option, the values entered into the Search Criteria fields that qualify the data shown in the table are also be applied to the charts.

> *— NOTE ———————————————————————————————*
> The values you enter can cause the chart to show no data in the flashboard. For example, if you query the requests that are closed, but the chart shows open requests, the qualification returns no rows.

3 Place your mouse pointer over the barchart in a flashboard.

For example, if you placed your mouse pointer over one of the bars in the barchart, a tooltip appears. These tooltips show information about the graph (for example, the number of service requests that are in the Planning state).

4 Click the graph to view the requests.

The Service Request form opens in Modify mode, showing the records in the Planning state. You can scroll through these records and modify them as needed.

Service requests status

On the Business Manager Console, you can quickly view a list of service requests by their status. From the Status list on the Business Manager Console, select a status by which to view service requests.

- Draft—The fields required to create the service request are entered in the Service Request form. Use the Draft status to record a service request without submitting it.

- Pending—Work on the service request has been temporarily suspended. You must specify a status reason (Approval or More Information) when the service request status is Pending.

- Waiting Approval—The service request has been submitted and is pending approval. A service request goes into Planning status when all of the approvers have approved it. When the service request is approved, it moves to the In Progress stage.

- Planning—Includes planning the work approved for implementation, targeting dates, and estimating costs. If the service request is divided into several tasks, the work order master can create and schedule these tasks.

- In Progress—Fulfillment providers work on the service requests. They log their progress as they implement the service request and perform any tasks included in it. When a task is completed, the task implementer for the task with the next number in the sequence is notified of the task assignment.

- Completed—The service request is updated to completed when it is closed in the fulfillment application. Users can update a completed service request, which creates a work order.

- Rejected—The approver rejects the service request (for example, a manager decides that it is more cost-effective to buy a new computer than to replace the hard drive).

- Cancelled—The service request is cancelled (for example, because the user remembers the password).

- Closed—The service request is closed when a requester completes the survey (if surveys are enabled), or automatically closed after 15 days.

Viewing request details

You can view your outstanding request details. High-level details of the service request appear (for example, that a change request was created to install a new hard drive on your system).

▶ **To view service request details**

1 From the Business Manager Console, perform a search for service requests.

A list of service requests that match your search criteria appear.

2 Select a service request.

The Service Request Summary summarizes details about the service request (for example, the service coordinator, the submit date, any price associated with the service request, and so on).

3 Click Request Details.

You can view information about the service request (for example, its request ID, its status, submit and required dates, and so on).

4 Click the Activity Log tab.

a Add notes and an attachment (as needed) to the log.

b Click Save.

5 Click Process View to view the processes behind the service request.

NOTE

Depending on your permissions and the definition of the service, you might not see Process tab or the Visual Process Editor. For more information, see the *BMC Service Request Management Administration Guide.*

Adding work information to a service request

You can add work information to service requests.

▶ **To add service request work information**

1 From the Business Manager Console, select a service request, and click Add Info To Request.

2 From the Request Work Info form, add work information as needed (for example, notes or an attachment).

3 Click Save.

Setting Business Manager Console preferences

You can view and edit the default appearance of the Business Manager Console. You can also specify search criteria defaults to use when the Business Manager Console opens.

▶ **To set Business Manager Console preferences**

1 From the Business Manager Console, choose Functions > Preferences.

2 From the Application Preferences form, click the Business Manager tab.

3 Modify the *default* search criteria for the Business Manager Console.

   For example, you might want the default settings for a particular company and region to appear (for example, the Northeast region of Calbro Services).

4 (*optional*) If you want the values entered into the Search Criteria fields applied to the flashboard, select Yes for the Apply search criteria? option.

   ── *NOTE* ──────────────────────────────
   By default, this option is set to No. The values you enter can cause the chart to show no data in the flashboard. For example, if you query the requests that are closed, but the chart shows open requests, the qualification returns no rows.
   ──

5 Click Save.

   You must close and open the Business Manager Console for the changes to appear.

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3 Using the Service Request Coordinator Console

This section provides tasks that a service request coordinator performs while working with service requests.

The following topics are provided:

- About the Service Request Coordinator Console (page 30)
- Viewing details in a service request (page 32)
- Adding work information to a service request (page 34)
- Reviewing the approval cycle of a service request (page 35)
- Accessing user information (page 35)
- Troubleshooting processes related to the service request (page 36)
- Other troubleshooting tips (page 38)

About the Service Request Coordinator Console

The Service Request Coordinator Console is used to plan, coordinate, and track service requests. Service request coordinators also have access to the Request Entry console and the Approval Console.

Service request coordinator activities include:

- Monitoring the current number of service requests that require attention, are late, require approvals, have errors, or are still open.

- Creating service requests on behalf of other users.

- Reviewing the approval cycle of service requests.

- Troubleshooting service requests.

The Service Request Coordinator listed on the service request. If users have problems with their service requests, they can send email messages to the service request coordinator to monitor or expedite the situation.

By default, the rules of the fulfillment applications select (in the round-robin assignment process) which member of the support group will be assigned as Service Request Coordinator for a service request. The People form tracks the last time people received assignments. The round-robin assignment process selects the person who was least recently assigned a service request. For more information, see the *BMC Service Request Management Administration Guide.*

Search criteria—Managing service requests

You can use the Service Request Coordinator Console to search for available service requests. You can specify search criteria and the search results table will show service requests in different states (for example, Waiting Approval), based on your query. The Search Criteria area enables you to filter the service requests you see in the search results table. If you leave all fields blank, the search results table shows all service requests that you have permissions to view.

About the Company and Console View

You can change the search results table's contents by using the Company and Console View options in the left navigation pane of the console to see, for example, all service requests that need approval. The Company and Console View options enable you to sort service requests by the options described in the following table.

Option	Action
Company	Shows the service requests based on company. If you have permissions to view only a single company, only that company appears in the list. Selecting Global shows only the service requests that are designated as "Global." Clearing the field shows records for all companies to which you have access.
Myself	Shows service requests that belong to you.
Other Person	Shows all other service requests that do not belong to your group.
Select My Groups ▶ Select Groups	Shows service requests for the support groups that you *select*.
All My Groups ▶ Show All	Shows service requests that are assigned to *all* support groups that you belong to.

After you perform your search, the results appear in the search results table. When you select a service request, an abbreviated list of details appears in the Service Request Summary.

When using a browser to access the application, if there are more records than the system can show in the table, use the arrow keys at the top of the table. If you are using BMC Remedy User, place the pointer in the table, right-click, and choose Next or Prev to see the next or previous grouping of records.

Setting Service Request Coordinator Console preferences

You can specify the default search criteria settings that are used when the Service Request Coordinator Console opens.

▶ **To set the Service Request Coordinator Console preferences**

1 From the Service Request Coordinator Console, choose Functions > Preferences.

2 On the Application Preferences dialog box, click the Service Request Coordinator tab.

3 On the Service Request Management User Preferences form, modify the default search criteria as needed.

For example, you might want a specific last name to appear by default in the Request Definition View.

4 Click Save.

You must close and re-open the Service Request Coordinator Console for the changes to appear.

Reviewing suggestions

You should regularly review the qualitative feedback from application users (for example, adding a service to the System Favorites).

▶ **To review suggestions**

1 Open the Service Request Coordinator Console.

2 Choose Functions > Suggestions.

3 Search the Suggestions form for items from your users.

You can search by category and create a report of user suggestions.

Viewing details in a service request

You can review the following information about service requests from the Service Request Coordinator Console:

- Request ID, Summary, Status, and Assignments
- Work information
- Service targets

— *NOTE* —

Service requests are usually attached to an incident, a change request, a work order, or another fulfillment application. Although incidents, change requests, or work orders inherit characteristics from the service request on which they are based, they have a life cycle of their own.

▶ **To view details in a service request**

1 Open the Service Request Coordinator Console.

2 View the Search Results field and the Details in the console.

3 Click the Work Info tab.

You can track a service request's progress by reviewing work performed on it by fulfillment application staff, customers, and users.

To filter the work information shown, choose one of the following options from the Show list:

- All—Shows all work information.
- Customer Communication—Shows only work information from the customer (requester).
- General Information—Shows general information about the request.

4 If BMC Service Level Management is installed, click the Service Level tab to view the information in the Service Targets table.

The associated service targets are listed in the Service Targets table.

You can see whether the request is proceeding within the service target time limits, or whether the target was missed. If the service target is past due, you should contact the fulfillment providers for more information, especially if you need to reset expectations with the user.

5 Click Request Details.

The Request Details dialog box displays read-only information about the service request (for example, its request ID, its status, submit and required dates, and so on).

6 Click the Activity Log tab, and add notes and an attachment (as needed) to the log.

7 Click the Process View button to view the processes behind the service request.

Figure 3-1: Request Details form—Process View

―― **NOTE** ――

If the Event Error button is enabled, it indicates a problem with the service request that must be fixed. See "Troubleshooting processes related to the service request" on page 36.

Adding work information to a service request

You can add work information to the service request on the Work Info tab on the Service Request Coordinator Console. Use this feature to add work information regarding tasks performed on the service request (such as the steps you took to troubleshoot an incident).

▶ To add work information to the service request

1 Open the Service Request Coordinator Console, search for and select your service request.

2 Click the Add Info To Request button.

3 In the Request Work Info dialog box, select the work information type (for example, General Information).

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

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

5 Enter the details of your work information record in the Date, Summary, and Notes fields.

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

7 Select the view access:

- Internal—If you want only users in your organization to see the entry.

- External—If you want everyone with access to the system to see the entry.

8 To add attachments to the entry, click Add.

9 Click Save.

The Save operation adds your entry to the service request's work history.

10 To see a report of the activities you performed against this service request, click Report.

Reviewing the approval cycle of a service request

You can follow the approval cycle of service requests. Approvals can be required for certain state transitions. A service request has various states to indicate its position in the life cycle. Some key state changes are coupled with the underlying application request status changes to reflect the overall status of the service request. A service request might also send notifications at certain points in its life cycle to alert users that a certain event occurred.

▶ **To review the approval cycle of service requests**

1 Open the Service Request Coordinator Console.

2 Click the Needs Attention link to view any requests that require your immediate attention, for example, requests that require your approval.

3 Choose Other Applications > Approval Console.

   Any approval to which the Service Request Coordinator is assigned appears in the list of approval requests.

4 Select the approval request, and click Approve.

5 Close Approval Central.

6 Return to the Service Request Coordinator Console, and click the Refresh button.

   The service request is set to Planning and removed from the list of requests that require your attention.

Accessing user information

If you monitor requests, you frequently work with requester information. For example, you might need to search for a requester in the database. If the requester does not exist, then you create a requester. You also might need to change existing requester information.

The People form contains the application user records. You can access this form in the following ways:

- Select People on the Application Administration Console.

- Select My Profile on the Overview Console or the Work Order Console. You can then see your user record.

- Click in the Last Name field on a form or dialog box, enter partial information that you might know about the individual or whom you are looking, and press ENTER.

Information stored in the People form is used to automatically fill in requester information fields in forms.

Troubleshooting processes related to the service request

To troubleshoot a service request, you can view the processes related to the request. If the service request has errors with the fulfillment application, you can fix them.

▶ To view processes related to a service request

1 Open the Service Request Coordinator Console, search for your service request, and click the Request Details button.

2 In the Request Details dialog box, click Process View to see the process related to the request. This view enables you to see the underlying objects used when creating work orders, incidents, change requests, and so on.

─── *NOTE* ───
If the Event Error button is enabled, there is an error in your service request that you must troubleshoot.
──

3 From the The Process form, click Event Error to troubleshoot the service request.

Figure 3-2: Process form
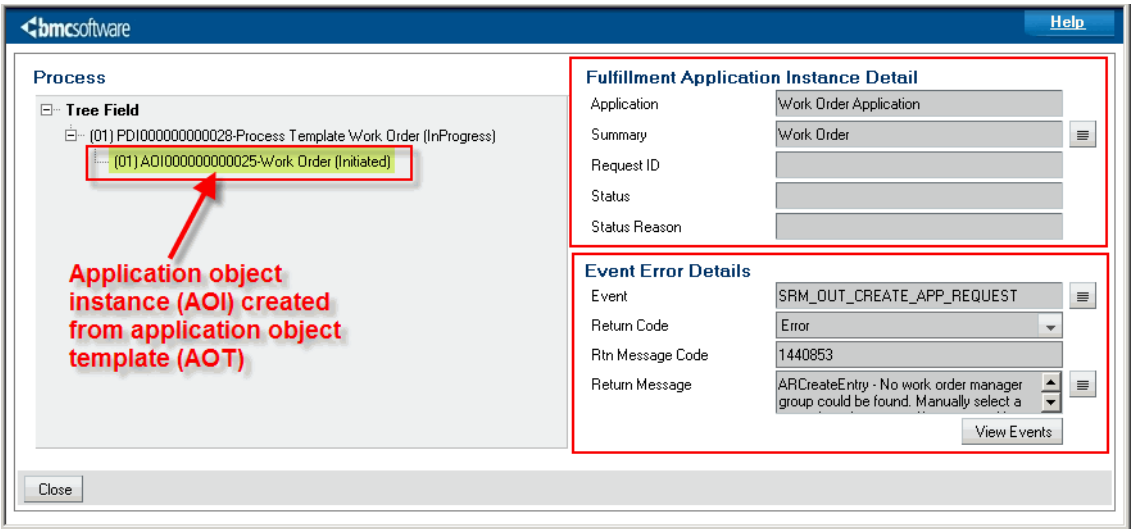
4 In the Fulfillment Application Instance Detail area, verify that the correct applications are instantiated.

   ■ If the event is successful, the Application Instance Details area shows the application that created the event, its request ID, and its current status.

   ■ If there is an error on the application instance, the event error details appear in the Event Error Details area of the Application Instances dialog box.

5 If an event contains an error (shown in Event Error Details area), click View Events.

The Event History form appears, showing the event history of the instance. If the event ran without errors, the entry is automatically deleted. As a result, you cannot view successful events in the Event History form.

Figure 3-3: Event History form

6 Debug the error with the fulfillment applications.

Typically, you see problems with fulfillment applications if your AOTs, PDTs, or SRDs were not defined properly.

For example, if you create a global entitlement for an SRD that assumed specific company information, errors might appear when the application attempts to create an entry. Users might enter invalid location information, but the SRD requires input of a specific Region, Site Group, and Site. Using the Event History dialog box to troubleshoot this type of error is difficult due to poor definition of the catalog entry.

Another example of poor definition of the catalog entry is adding questions that do not properly create the fulfillment request. If you want a user to enter the urgency of a request, make sure you specify that the Urgency question is required and *must* be answered. Otherwise, if users ignore the question (because they thought it was optional) and submit the request, the fulfillment application generates an error.

7 Click Retry to re-start the application instance command.

8 Close the Event History dialog box.

When you have fixed the error with the fulfillment application, the application generates a request ID and automatically moves the application request into the In Progress state.

9   Close the View History dialog box.

The Request Details dialog box shows the fulfillment ID of the fulfillment application.

10 Close the Request Details dialog box.

The fulfillment application ID is properly generated, and the service request is ready to work on.

11 After the problem is fixed, make sure that the person working on the service request fulfills it in a timely manner.

If necessary, you might also need to track that the request is approved by the appropriate person.

12 Track the service request until its status reaches the Completed state.

Other troubleshooting tips

Use the following troubleshooting tips to correct event errors that can appear in the Process View.

For more troubleshooting information, see the *BMC Service Request Management 7.6.00 Troubleshooting Recommendations* white paper.

If this error appears	Do this
Cannot create entry (ARCreateEntry)—Required fields cannot be set to a NULL value	The fulfillment application cannot create an entry if the required fields do not contain valid data. 1 Scroll through the Event Parameters list to find the field with the NULL value. 2 Enter a valid parameter value in the Param Value field. 3 Click the Commit button, and click Retry. The new parameter is processed. 4 Close the Event History dialog box and the Application Instances dialog box. 5 Refresh the service request. The Error code is no longer in the Event Status field. 6 Open the View Process dialog box. You see the request that was created.

If this error appears	Do this
Cannot create entry (ARCreateEntry)—Operational categorization information is invalid for the specified company.	The fulfillment application cannot create an entry if the categorization is incorrect. 1 Scroll through the Event Parameters list to find the incorrect categorization values from the service request. For example, the user entered TEL as the category. 2 Remove the invalid parameter value in the Param Value field. 3 Click the Commit button, and click Retry. The new parameter is processed. 4 Close the Event History dialog box and the Application Instances dialog box. 5 Refresh the service request. The Error code no longer appears in the Event Status field. 6 Open the View Process dialog box. You see the request that was created.
Cannot create entry (ARCreateEntry)—No *application* group could be found. Manually select a group from the menus. If no group with an individual in the functional role of *application* manager is defined, notify your System Administrator.	The fulfillment application cannot create an entry because the assignment manager rules are not properly configured for the fulfillment application. 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Foundation > Configure Assignment > Configure Assignment, and click Open. 3 From the Configure Assignment form, make sure the Work Order Assignee and the Work Order Manager events appear in the Assignment Configuration window. 4 Make sure that you have properly configured the group assignments for the correct events, for example, the Work Order Assignee and the Work Order Manager events. 5 Make sure the correct available applications are selected. For example, you cannot create a work order if Work Order Management is not selected. For information about configuring assignment, see the *BMC Service Request Management Administration Guide.*
Cannot create entry (ARCreateEntry)—You cannot submit or modify the incident status from *incidentState*> to New.	The application cannot create the incident because the incident template is not correctly configured. 1 Open the incident template. 2 Make sure that the template is assigned to the correct support company, support organization, and assigned group. 3 If the incident template is assigned to a specific assignee, clear the name from the Assignee field. Do not assign incident templates to a specific individual. 4 Open the Request Details dialog box to view the underlying event error, as described in "Troubleshooting processes related to the service request" on page 36. 5 When you view the event in the Event History, click Retry. When you return to the Request Details and view the Process View, you can see that the incident request was successfully created.

If this error appears	Do this
ARCreateEntry - Value does not fall within the limits specified for the field (Maximum length - *fieldLength*) : *paramName* Note: Field length in the service request is too long—fixing the configuration to stop the underlying problem.	The fulfillment application cannot create an entry because the data pushed from a field in the service request is too long. The error in the CAI occurs because the field length in the service request field (for example, 120 characters) exceeds the field length of the fulfillment application (for example, 100 characters). Follow these steps to correct the underlying configuration problem in the application: 1 From the Custom Configuration tab, choose Service Request Management > Application Configuration > Define Application Target Data, and click Open. 2 Configure the Field Length of the application target data to be less than or equal to the field length in the fulfillment application. You no longer see this problem when a service request creates the entry. However, you will still see a TRUNCATE WARNING message in the Work Info History.
ARCreateEntry - Value does not fall within the limits specified for the field (Maximum length - *fieldLength*) : *paramName* Note: Field length in the service request is too long—fixing the record	The fulfillment application cannot create an entry because the data pushed from a field in the service request is too long. Follow these steps to correct the problem with the service request: 1 Scroll through the Event Parameters list to find the Param Name field with the incorrect value. 2 Reduce the number of characters in the Param Value field to less than or equal to the maximum length, for example, 98 characters. 3 Click the Commit button, and click Retry. The correct parameter is processed. 4 Close the Event History dialog box and the Application Instances dialog box. 5 Refresh the service request. The Error code no longer appears in the Event Status field. 6 Open the View Process dialog box. You see that the request was created. 7 Close the dialog box. 8 Click the Work Info tab, and select All in the Show list. A general information TRUNCATE WARNING message appears in the Work Info History. This warning appears because the field length value in the service request is not within the limits specified for the field and was truncated in the fulfillment application. The entry was successfully created, however, some data was not pushed to the fulfillment application.

If this error appears	Do this

When submitting a service request with an attachment, you might see the following error with the `SRM_OUT_UPDATE_APP_REQUEST_WORKLOG` event command (with incidents, change requests, and work orders):
 	
`Unable to get the Request ID from application:application Interface. The entry you requested does not exist.`
 	
For example, with BMC Remedy Change Management, the following error appears:
 	
`Unable to get the Request ID from CHG:Change Interface. The entry you requested does not exist.`
	You can ignore this error message. The service request is not affected. You can still complete the fulfillment application requests and the service request.

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4 Fulfilling service requests

Fulfillment providers work with a fulfillment application doing their typical job (for example, using BMC Remedy Change Management to work on change requests). They complete their tasks in the fulfillment application and update their task status in their specific applications. The states in the fulfillment applications are rolled up into the request status that is visible to users.

> **NOTE**
> Fulfillment providers must have appropriate permissions to the applications they are assigned. For example, a fulfillment provider working with change requests must have Change User and Asset Viewer permissions.

The following topics are provided*:*

- Relationships of service request states to fulfillment application states (page 44)
- Creating service requests from fulfillment applications (page 45)
- Completing service requests (page 47)
- Viewing activity log entries in the service request (page 48)
- About viewing details of service requests in fulfillment applications (page 48)

Relationships of service request states to fulfillment application states

Service requests generate requests in fulfillment applications. For example, when a service is requested, the request can generate an incident, a change request, or a work order. Although incidents, change requests, or work orders inherit characteristics from the service request on which they are based, they have a life cycle of their own.

Service request state	Incident state	Change request state	Work order state
Draft	N/A	N/A	N/A
Waiting Approval	N/A	N/A	N/A
Rejected	N/A	N/A	N/A
Planning	Assigned	Request for Authorization	Assigned
Pending	Pending	Pending	▪ Waiting Approval ▪ Pending
In Progress	In Progress	▪ Planning in Progress ▪ Request for Change ▪ Scheduled For Review ▪ Scheduled For Approval ▪ Scheduled ▪ Implementation In Progress	▪ Planning ▪ In Progress
Cancelled	N/A	N/A	▪ Rejected ▪ Cancelled
Completed	▪ Resolved ▪ Closed	▪ Completed ▪ Closed	▪ Completed ▪ Closed
Closed	N/A	N/A	N/A

Creating service requests from fulfillment applications

Fulfillment applications can generate service requests. For example, when an incident, change request, or work order is created, these requests can generate a service request.

— **NOTE** —

The application ships with three system SRDs to support the reverse creation of service requests from fulfillment applications. Each SRD comes with its corresponding system PDT and AOT. For information about SRDs shipped with the application, see the *BMC Service Request Management Administration Guide.*

The following table compares the relationship of work order states to service request states:

Work order state	Service request state	Status reason
N/A	Draft	
N/A	Waiting Approval	
N/A	Rejected	
Assigned	Planning	
Pending	Pending	Need More Information
Waiting Approval	Pending	
Planning	In Progress	
In Progress	In Progress	
Completed	Completed	Successful
Rejected	Cancelled	By Provider
Cancelled	Cancelled	By Provider
Closed	Completed	Successful

The following table compares the relationship of change states to service request states:

Change request state	Service request state	Status reason
Draft	Planning	
Request for Authorization	Planning	
Request for Change	Planning	
Planning in Progress	Planning	
Scheduled For Review	Planning	
Scheduled For Approval	Planning	
Scheduled	Planning	

Change request state	Service request state	Status reason
Implementation In Progress	Planning	
Pending	Pending	Need More Information
Rejected	Cancelled	
Completed	Completed	Successful
Closed	Completed	Successful
Cancelled	Cancelled	By Provider

The following table compares the relationship of incidents to service request states:

Incident state	Service request state	Status reason
New	N/A	
Assigned	Planning	
Pending	Pending	Need More Information
In Progress	■ In Progress ■ Planning	
Resolved	Completed	Successful
Closed	Completed	Successful
Cancelled	Cancelled	By Provider

▶ **To generate a service request from a fulfillment**

1 Open the Rules form for your fulfillment application.

For example, to open Work Order Rules, choose Custom Configuration > Service Request Management > Work Order > Rules.

The following example uses Work Order Management. The procedure is similar for BMC Remedy Incident Management and BMC Remedy Change Management.

For more information about Work Order Management rules, see the *BMC Service Request Management Administration Guide*. For more information about Change Management and Incident Management rules, see the *BMC Remedy IT Service Management Configuration Guide*.

2 In the Create Service Request on Submit field, select Yes.

When this field is set to Yes, when a user submits a work order, a corresponding service request is created. The user can view this request using the Request Entry console.

3 Open the Work Order Console and create a work order.

Because the work order rules were configured to allow the creation of a service request when you submit a work order, a special advanced function appears in the Work Order form.

The same advanced function is in the Change form and the Incident form.

4 Submit the work order.

5 Choose Advanced > Allow Request Creation.

The following message appears: `A service request will be generated for each change you submit.`

> **— NOTE —**
> You *must* choose this advanced function to create the service request when you submit the work order.

If you choose Advanced > Suppress Request Creation, the following message appears: `Service request will not be created for each new change you submit.`

6 Save the work order.

7 Perform a search for the work order you just submitted.

8 Click the View Service Request link on the work order.

9 Enter work information about the service request in the Request Details dialog box.

10 View Service Request link on the work

11 Open the Request Entry console to view your submitted requests.

The service request appears in the list of submitted requests with a status of Planning.

12 Move the work order to completion.

As you move the work order from one state to the next, the service request also moves from state to state.

Completing service requests

Fulfillment providers complete the fulfillment assignments that are required to fulfill the request. For example, a request to replace a hard drive might generate multiple incidents, change requests, or work orders. A service request might also send notifications at certain points in its life cycle to alert users that a certain event occurred.

▶ **To fulfill a service request when a change request or an incident is involved**

1 From the IT Home Page, open the Change Management Console or the Incident Management Console.

2 Perform a search for requests assigned to you:

3 Select the request, and click View.

4 Use the Process Flow Status wizard in the Change Request form or the Incident Request form to advance the request.

5 When you have finished with the details of the request, save the request.

When the fulfillment request is successfully fulfilled, the status of the service request is automatically set to Completed (successful) in the Request Entry console.

▶ **To fulfill a service request when a work order is involved**

1 From the IT Home Page, open the Work Order Console.

2 Perform a search for work orders assigned to you:

3 Select the work order, and click View.

4 As you progress on the work order, update your status and track your work information in the Work Order form.

5 When you have finished with the work order, save the work order.

When the fulfillment request is successfully fulfilled, the status of the service request is automatically set to Completed (successful) in the Request Entry console.

Viewing activity log entries in the service request

In the Request Entry console, you can view activity log information entered by other staff members who worked on the request.

▶ **To view activity log entries in service requests**

1 Open the Request Entry console, search for the service request, and select it.

2 Click Request Details.

3 In the Request Details dialog box, click the Activity Log tab.

4 Verify that the work information entered by staff members is correct.

5 If necessary, add a log entry to the activity log.

About viewing details of service requests in fulfillment applications

If an incident, change request, or work order is attached to a service request, you can view details, such as its Request ID, its work history, requester, submit date, status, and so on. You can also enter work information about the service request.

To view details about a service request for a change request or an incident, choose Advanced Functions > View Service Request from the Incident Management Console or the Change Management Console. To view details about a work order, click the View Service Request link on the work order form.

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5 Communication with users

This section describes of communicating with users by sending notifications and broadcasting messages.

The following topics are provided*:*

- Sending and receiving notifications (page 50)
- Broadcasting messages (page 52)

Sending and receiving notifications

When a service request moves to a new status (for example, Pending or Planning), the application generates notifications. Based on their group or role, users might receive notifications during various service request or work order status changes.

—— *NOTE* ——————————————————————————————————

By default, users triggering actions do *not* receive notifications of that action. For example, users logging into the system and assigning a work order to themselves are not notified. The system assumes users know they performed the action and bypasses the notification.

———

Some notifications are not triggered by status transitions, but by separate actions. For example:

- Signature notifications—Approvers receive a notification that they were chosen as approvers when the signature is created.
- Group notifications—Group notifications are sent to the assigned group when the assigned group changes.
- Assignments—After a request is assigned or if its assignment changes, this action triggers a notification to the assignee regardless of the request's status.

The application also includes conditional notifications, which occur in certain conditions but not in others. For example, group notifications for a work order are sent *only* if there is no assigned individual.

For information about notification preferences, see the *BMC Remedy IT Service Management Configuration Guide.*

Service request notifications by roles

The following table lists the service request status changes that trigger notifications, and the application roles to which they are sent.

Current status	Requested for	Requested by
Draft	Not applicable	Not applicable
In Cart	Not applicable	Not applicable
Pending	Not applicable	Yes
Waiting Approval	Not applicable	Yes Note: The Requested By user also receives a notification after the request is approved.
Planning	Not applicable	Yes
Assignment	Not applicable	Not applicable
In Progress	Not applicable	Not applicable
Completed	Yes	Yes
Closed	Not applicable	Not applicable

Current status	Requested for	Requested by
Rejected	Not applicable	Not applicable
Cancelled	Not applicable	Not applicable

Service request assignees receive notifications when a request is assigned to them. This action can happen at any status but typically occurs at the beginning of the request's life. The notification does not list a status but only notifies the assignee that the service request is assigned to him or her.

Work order notifications by groups

The Request Manager and Request Assignee groups are notified when they are assigned a service request, *if* no individual is assigned in the group.

— *NOTE* —
In group notifications, there is a slight delay between the triggering state of the request and the sending of notifications to group members.

Work order notifications by roles

The following table lists the service request states that trigger notifications and the application roles they are sent to.

Current status	Requested for	Requested by	Work order assignee	Work order manager
Assigned	Yes	Yes	Yes	Yes
Pending	Yes	Yes	Not applicable	Not applicable
Waiting Approval	Yes	Yes	Not applicable	Not applicable
Planning	Note: A notification is sent when the work order is approved, which can be seen when the request goes to Planning.	Note: A notification is sent when the work order is approved, which can be seen when the request goes to Planning.	Not applicable	Not applicable
In Progress	Yes	Yes	Not applicable	Not applicable
Completed	Yes	Yes	Not applicable	Not applicable
Rejected	Yes	Yes	Not applicable	Not applicable
Cancelled	Yes	Yes	Yes	Yes
Closed	Not applicable	Not applicable	Not applicable	Not applicable

Broadcasting messages

The broadcast feature enables you to send messages to your entire organization, selected groups in the organization, or to external customers. 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.

Broadcasts are filtered by the logged-in user's company, based on the following criteria:

- Broadcasts are defined for the logged-in user's company
- If the logged-in user's company cannot be determined, only Global broadcasts appear.
- Only broadcasts defined for the Global company are shown to guest users, who are not associated with a company.

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

You can view broadcast messages from the following locations:

- From the Overview Console or the Work Order Console, select the message to view from the Broadcast table, and click View.
- From the Service Request Coordinator Console or the Business Manager Console, click View Broadcasts.

Setting broadcast default preferences

You can view and edit the default broadcast auto pop-up settings. Depending on which consoles you have permissions to access, you can also view their preferences and options.

▶ **To set broadcast default preferences**

1 From the application console, choose Functions > Preferences.

2 In the Request Preferences form, click the Request Entry tab.

3 In the Broadcast Auto Popup field, specify one of the following default settings:

- Never—Administrators and users never see the broadcast warnings.
- On Console Open—Administrators and users see the broadcast warnings when the console opens.
- On New Broadcast—Administrators and users see the broadcast warnings *only* when there is a new broadcast.

4 Click Save.

For the changes to take effect, you must close the application and log in again.

Creating broadcast messages

To create a broadcast, you must have the functional role of Broadcast Submitter.

▶ **To create a broadcast message**

1 From the Overview Console, click Create, which appears below the Broadcast table.

2 Enter information in the following required fields:

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

  The Company field is required. You fill in the other location fields to indicate a specific part of the company, such as the site, organization, or department.

- Subject—A short description of what the broadcast is about.

- Broadcast Message—The text of the 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, and use the calendar to select the broadcast start and end dates. You can also use the Time feature at the bottom of the calendar to specify times of the day.

- Broadcast Originated From—This is automatically filled in with contents that 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 automatically filled when you create a broadcast from a record. If you create a broadcast from the main console, the field is disabled.

- View Access—Select Internal to make the broadcast visible only to members of your organization. Select Public to make the broadcast visible from the Request Entry console.

- Notify—Select Yes for the broadcast notification to be automatically sent to an individual or a group.

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

  - Use the Manual Email button to manually send an email message about the broadcast to a person or a group. When the Email System form appears, enter the recipient's email address in the Internet Email field, and click Send Email Now.

  - Use the Notify Support area to indicate which group to notify of the broadcast. You must complete the Support Company, Support Organization, and Support Group fields. The notification is sent at the time and on the date specified in the Broadcast Start Date field.

- Priority—Select Low, Medium, or High for the priority level for the broadcast.

3 (*optional*) To add an attachment to the Broadcast, right-click inside the table, and select Add.

You are limited to one attachment for each broadcast.

4 (*optional*) To enable members of another group to modify the message, follow these steps:

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

b In the Authoring Group dialog box, select from the lists to indicate which groups have authoring rights.

c Click Add.

___ *NOTE* ___

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

5 Click Save.

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6 Using reports

Use the Report Console to generate predefined reports to give you quick and easy access to information about activities in the application.

The following topics are provided:

- About predefined reports (page 56)
- Generating reports (page 59)

About predefined reports

The application includes predefined reports. You can manage the scope of a predefined report using qualifications. You can also generate reports with your own qualifications, advanced qualifications, and saved qualifications. For information about accessing reports, see "Generating reports" on page 59.

If you have other BMC Remedy applications installed, additional reports are listed in the Report Console. For information about reports provided with other applications, see the appropriate user's guide.

— NOTE

If you use modify the prepared reports supplied with the application, Customer Support can provide only limited assistance for reporting problems. In addition, there is no guarantee that problems resulting from these modifications can be solved. The standard reports included with the application are designed to be used without modification.

The following types of reports are available:

Web reports—The Web report type was introduced in release 7.6.02 of BMC Remedy AR System to provide browser users the ability to create nicely formatted reports. Results can be returned in the form of a list, many styles of charts, or a list and chart together. Web reports can contain links that allow you to drill down from the report to view the data upon which the report is based. Web reports can be saved in several standard formats, including Adobe PDF and Postscript, and Microsoft Word, Excel, and PowerPoint formats.

— NOTE

Web reports must be run from a browser and are not available using BMC Remedy User.

Crystal reports—Some installations of BMC Remedy AR System are integrated with the Business Objects or Crystal Reports reporting tools. If your administrator has installed one of these products and has designed Crystal reports for use with BMC Remedy AR System, you can run Crystal reports from the Report Console.

The following table lists the predefined reports that are installed with the application.

Report title	Format	Required permissions	Description
Service Requests by Location	Web	Request Catalog Manager or SRM Administrator	Shows all service requests and the number of times the service request was used for a particular location and category. Totals are shown for each location, category, and service request.
Service Requests by Organization and Department	Web	Request Catalog Manager or SRM Administrator	Shows all service requests and the number of times the service request was used by a particular organization and department. The organization and department is based on the Requested For information about the service request. Totals are shown for each organization, department, category, and service request.
Service Request Definitions by Status	Web	Request Catalog Manager or SRM Administrator	Shows all SRDs with catalog manager information, their online or offline status, and their effective dates.
Survey Results Detail	Web	Business Manager, or Service Request User, or Request Catalog Manager, or SRM Administrator	Shows detailed results of surveys submitted by users. This report can be generated for a specific company over a date range. The report shows the service request, ratings, and comments for each survey submitted.
Deployed Service Request Definitions by Catalog Manager	Crystal	Request Catalog Manager or SRM Administrator	Shows deployed SRDs, grouped by catalog manager. This report also shows their offline/online status and effective dates. You can specify a date range for the report. You can specify an additional qualification from the Report Console to filter the results (for example, to filter requests by a specific catalog manager, and so on).
Feedback Details	Crystal	Business Manager, or Service Request User, or Request Catalog Manager, or SRM Administrator	Shows detailed results of suggestions submitted by users. This report can be run for a specific company over a date range, and optionally can be filtered by status or by suggestion category. This report is available only in English.
Fast Request Breakdown by Organization and Department	Crystal	Request Catalog Manager or SRM Administrator	Shows requests that have an actual close date sooner than expected close date.
Locations by Service Requests	Crystal	Request Catalog Manager or SRM Administrator	Shows all service requests and the locations that use that service request. The total count is shown for each location and service requests.

Report title	Format	Required permissions	Description
Missed Request Breakdown Report	Crystal	Request Catalog Manager or SRM Administrator	Shows service requests for different goal types for a selected time period. The time the request was submitted and the expected completion time for the request must fall within the start time and the end time specified for the report. The service requests are grouped by goal type. Percentages are calculated at the goal type level. Note: Requires BMC Service Level Management.
Missed Requests By Goal Type Report	Crystal	Request Catalog Manager or SRM Administrator	Shows service request missed metrics for the selected time period and goal type. The time the request was submitted and the expected completion time for the request must fall within the start time and the end time specified for the report. The service requests are grouped by name. Percentages are calculated per service request name or type. Note: Requires BMC Service Level Management.
Request Compliance Report by Category	Crystal	Request Catalog Manager or SRM Administrator	Shows detailed service request compliance information for the selected time period, goal type, and category. An option is available to include expired requests, which are not included by default. The service requests are grouped by name. Percentages are calculated per service request name or type. Note: Requires BMC Service Level Management.
Service Request Definition Pricing by Organization	Crystal	Request Catalog Manager or SRM Administrator	Shows pricing information for service requests for a selected company, grouped by the Service Request Definition used to create them. These groupings are separated by Organization, Department, and Categorization used for the service request. This information enables you to determine which departments and organizations are using which SRDs.

Report title	Format	Required permissions	Description
Slow Request Breakdown by Organization and Department	Crystal	Request Catalog Manager or SRM Administrator	Shows requests that have an actual close date later than the expected close date.
Survey Results Summary	Crystal	Business Manager, or Service Request User, or Request Catalog Manager, or SRM Administrator	Shows summary results of totals for surveys that have been submitted by users. This report can be run for a specific company over a date range. The report shows a summary of the ratings (minimum, maximum, and average ratings), for all surveys submitted within a category, service request, and organization. This report is available only in English.

Generating reports

Use the following procedure to generate a report.

▶ **To generate a report**

1 From an application console, such as the Business Manager Console, choose Functions > Reports.

2 From the Report Console, select a report name.

The list varies, according to your permissions and which applications are installed.

— *NOTE* —————————————————————————————

You can run Web reports from a browser only. (You can run Crystal reports from a browser or BMC Remedy User.)

3 By default when you run a report it uses any built-in query to select the records included in the report. To change the report results, follow these optional steps:

a To override the built-in query to widen or change the report results, select the Override option.

b To add a qualification to narrow the report results, click Show Additional Filter.

For more information, see the *BMC Remedy Action Request System BMC Remedy Mid Tier Guide*.

4 Click Run.

5 Enter any requested parameters, and click OK.

**NOTE**

If you are having formatting problems when viewing reports from a browser, ask your administrator to make sure report configuration settings are defined in the AR System User Preference form, as described in the *BMC Remedy Action Request System Configuration Guide.*

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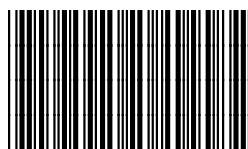
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