# BMC Remedy: HOW TO

## MANAGE PEOPLE RECORD LICENSING

May 2014 Training Sheet QRG

## Overview

The focus for this training sheet is to guide the team to record the creation, modification and deletion of a profile from the system so that the creation and any kind of modifications to the profile can be easily tracked.

The process below should be followed for the creation, modification, and deletion of a profile for a Support Staff people record.

The guide highlights best practice (symbol) and points of information (symbol).

## Creation of a Profile for a Support Staff

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| 1. Logon and access the People Form via the Application Administration Console and click new search. 2. To validate whether the user is a duplicate of an existing people record. Do this by, comparing data fields such as Telephone number/email address. 3. If the user does not exist in the system, ask the required information to create the profile in the system and also the cost centre code along with the cost centre manager approval as a license needs to be released for the same and needs to get costed at the end of the month. 4. Create the profile and attach the cost centre manager approval in Work info tab of the people profile along with the INC ID/WO number so that we can easily track who has requested the profile and whether that was approved by the cost centre manager for the license that the user is using. 5. Update the AR System User Preference form of the user to SHR:LandingConsole   C:\Users\TripathiI\Pictures\qrg1.png  Modification of a Profile for a Support Staff  **End User Needs to be a Support Staff**   1. If an end user requests to be a support staff, get the basic information to set him up as a support staff along with his line mangers approval mail. 2. Get the cost code under which the user should be costed along with the cost centre manager approval mail for the same.   Update the Work Info tab accordingly which is (INC ID/WO number, Cost centre manager approval mail).   1. Update the AR System User Preference form by SHR:LandingConsole.   **Support Staff has shifted to different support group**   1. If a user who is a support staff has been shifted to a different support group, Ask him what would be his new cost code under which his usage of the license needs to be costed.   Update the company addition and removal accordingly as per the secure access matrix.   1. Ask for the approval from his line manager for the same. 2. Update the Work Info tab accordingly (INC ID/WO number, Cost centre manager approval mail, previous cost code).   **Support Staff needs to be an end user**   1. If a user who is a support staff is no longer required to be one and needs to be converted to an end user, need to check if the user has been assigned any tickets from that support group and if yes it needs to be closed or reassigned to someone in the team. 2. Seek approval from his line manager for the same 3. Convert him to an end user removing his cost centre code and removing the license that he has been using.   Remove all company associations which are not required as per the access matrix.   1. Update the Work Info tab accordingly (INC ID/WO number, Line manager approval, and previous cost code). 2. Update the AR System User Preferences Form by SRS:ServiceRequestConsole   **Deletion of a Profile for a Support Staff**   1. If a user who is a support staff has left capita and his profile is no longer required in the system   Need to check if the user has been assigned any tickets, if yes, they need to be closed or reassigned to someone in the team.   1. Remove his cost centre code and remove the license that he has been using by changing this to a Read only license. 2. Set the assignment availability as NO, reset the password and mark the user as offline.   Remove all company associations which are not required as per the access matrix.   1. Update the Work Info tab accordingly (INC ID/WO number, Line manager approval, Previous Cost code).   **License to be recycled for a Support Staff**   1. Requester may ask to recycle a license from an old support user to the new Support user. 2. Take the approval from the CCM regarding the same, remove the license from the old profile (make license as read, status of profile as obsolete and reset the password) and remove the company associations. 3. Release the license for the new profile and update the work info accordingly by attaching the CCM approval   In the work info tab of the people profile (INC ID/WO number, Line manager’s approval mail, name of the person who is getting replaced and the cost code).   1. Update the AR System User Preference form by SHR:LandingConsole.   Utilisation of Fixed Licenses   1. If the Request comes for disabling a user having a fixed License, remove the license and provide it to someone else carrying a JSDD cost code. 2. Update the list on ITS One under Governance same level as the Access Matrix Named “Remedy Licenses” accordingly by removing the user from the list, who has been disabled and marking the user as Green who has got the Fixed License and load the updated list on ITES One. | |
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