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<tr>
<th>Address</th>
<th>Telephone</th>
<th>Fax</th>
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<tbody>
<tr>
<td>BMC SOFTWARE INC</td>
<td>1 713 918 8800</td>
<td>1 713 918 8000 or 1 800 841 2031</td>
</tr>
<tr>
<td>2101 CITYWEST BLVD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HOUSTON TX 77042-2827 USA</td>
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**Outside United States and Canada**

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<th>Telephone</th>
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<td>+01 713 918 8800</td>
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■ read overviews about support services and programs that BMC offers
■ find the most current information about BMC products
■ search a database for problems similar to yours and possible solutions
■ order or download product documentation
■ download products and maintenance
■ report a problem or ask a question
■ subscribe to receive proactive e-mail alerts
■ find worldwide BMC support center locations and contact information, including e-mail addresses, fax numbers, and telephone numbers

Support by telephone or e-mail
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 e-mail 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
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 or other maintenance level such as PUT or PTF
  — 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 questions about your license key or password, use one of the following methods to get assistance:

- Send an e-mail to customer_support@bmc.com.
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About this Book

This guide describes how to use the BMC Remedy Problem Management application of the BMC Remedy IT Service Management Suite.

The BMC Remedy IT Service Management Suite includes the following applications:

■ The BMC Remedy Service Desk solution, which includes the BMC Remedy Incident Management application and the BMC Remedy Problem Management application

■ The BMC Remedy Asset Management application

■ The BMC Remedy Change Management application, which also includes the BMC Remedy Release Management module

The applications run with the BMC Remedy Action Request System (BMC Remedy AR System) environment and share a common database. All these applications receive data from the BMC Atrium Configuration Management Database (BMC Atrium CMDB).

Audience

This guide is intended for the following IT professionals:

■ IT support staff

■ Problem coordinators
BMC Remedy IT Service Management documents

The following table lists the documentation available for BMC Remedy Service Desk: Problem Management. It also lists relevant documents for related solutions and products.

Unless otherwise noted, online documentation is available with the product and on the Customer Support website at [http://www.bmc.com/support](http://www.bmc.com/support).

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<tr>
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<td>Information about known issues in each release of BMC Remedy IT Service Management. Also provides a list of new features included with the applications.</td>
<td>Everyone</td>
</tr>
<tr>
<td><em>BMC Remedy Service Desk: Problem Management User Guide</em></td>
<td>Procedures for using the BMC Remedy Problem Management application; includes new features and an overview.</td>
<td>Everyone</td>
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<tr>
<td><em>BMC Remedy IT Service Management Administration Guide</em></td>
<td>Procedures for configuring and administrating the BMC Remedy IT Service Management applications.</td>
<td>Administrators</td>
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<tr>
<td><em>BMC Remedy IT Service Management Concepts Guide</em></td>
<td>Conceptual overview information about the applications that make up the BMC Remedy ITSM Suite of applications.</td>
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<tr>
<td>Help</td>
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**Additional BMC Remedy IT Service Management products**

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<td><em>BMC Remedy Change Management User Guide</em></td>
<td>Procedures for using the BMC Remedy Change Management application; includes new features and an overview.</td>
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**Solutions**
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<td><strong>BMC Service Impact Manager: Integration for BMC Remedy Service Desk User Guide</strong></td>
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<tr>
<td><strong>BMC Service Request Management Release Notes</strong></td>
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<tr>
<td><strong>BMC Remedy Knowledge Management User Guide</strong></td>
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<td><strong>BMC Service Management Process Model</strong></td>
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Conventions

This document uses the following special conventions:

- All syntax, operating system terms, and literal examples are presented in this typeface.

- Variable text in path names, system messages, or syntax is displayed in italic text: `testsys/instance/fileName`

- This document uses a symbol to show menu sequences. For example, `Actions => Create Test` instructs you to choose the `Create Test` command from the `Actions` menu.

Syntax statements

This topic explains conventions for showing syntax statements.

A sample statement follows:

```
COMMAND KEYWORD1 [KEYWORD2 | KEYWORD3] KEYWORD4={YES | NO} fileName...
```

<table>
<thead>
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| Items in italic type represent variables that you must replace with a name or value. If a variable is represented by two or more words, initial capitals distinguish the second and subsequent words. | `alias`  
`databaseDirectory`  
`serverHostName` |
| Brackets indicate a group of optional items. Do not type the brackets when you enter the option. A comma means that you can choose one or more of the listed options. You must use a comma to separate the options if you choose more than one option. | `[tableName, columnName, field]`  
`[-full, -incremental, -level](UNIX)` |
<table>
<thead>
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<tr>
<td>Braces indicate that at least one of the enclosed items is required. Do not type the braces when you enter the item.</td>
<td>{DBDName</td>
</tr>
<tr>
<td>A vertical bar means that you can choose only one of the listed items. In the example, you would choose either commit or cancel.</td>
<td>{commit</td>
</tr>
<tr>
<td>An ellipsis indicates that you can repeat the previous item or items as many times as necessary.</td>
<td>columnName...</td>
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Introducing BMC Remedy Problem Management

The BMC Remedy Problem Management application is used to manage problem investigations, known errors, and solution database entries. In the IT Infrastructure Library (ITIL) model, problem management focuses on reducing the number of incidents; either reactively, by preventing them from recurring, or proactively by preventing them from occurring.

An important ITIL objective is to minimize service disruptions. A problem investigation helps an IT organization get to the root cause of incidents. It initiates actions that help to improve or correct the problem, preventing the incident from recurring. For example, if computers are running low on disk space and this is discovered during a problem investigation, the problem can be resolved before it becomes an incident that causes a disruption to service.

After a problem investigation identifies the root cause of the incident, the information results in a known error. A known error is a problem that has been successfully diagnosed and for which a temporary work-around or permanent solution has been identified. Service desk analysts and specialists can use the work-around information in the known error to resolve similar incident requests if they occur before the proposed structural solution has been implemented.

Many of the processes described in this guide are developed from the BMC Remedy Service Management Process Model (SMPM), which is a companion product to BMC Remedy Problem Management. The SMPM describes a set of predefined processes for the delivery and support of information technology (IT) services. The processes described by the SMPM are aligned with ITIL good practices.

BMC Remedy ITSM usability enhancements

The BMC Remedy ITSM 7.6.04 release contains the following usability enhancements. These enhancements are available only when the applications are accessed through a web browser.
### Table 1: BMC Remedy ITSM usability enhancements

<table>
<thead>
<tr>
<th>Description</th>
<th>Affected applications and modules</th>
</tr>
</thead>
</table>
| To help you retrieve information faster, the type-ahead search functionality is available on more fields. When you start to type a query into a field that has the type-ahead search functionality, one or more possible matches are immediately presented for selection in a drop-down list. As you type more characters, the list changes to match what you type. | ■ BMC Remedy Change Management  
■ Release Management  
■ BMC Remedy Incident Management  
■ BMC Remedy Problem Management  
■ BMC Remedy Knowledge Management  
■ BMC Service Request Management |
| To improve application usability when using the Best Practice and Classic view, a system-generated record ID is assigned to all new record types immediately when the application displays the form in New mode. | ■ BMC Remedy Change Management  
■ Release Management  
■ BMC Remedy Incident Management  
■ BMC Problem Management  
■ BMC Service Request Management (work order) |
| To improve application performance, system administrators can configure system messages from filters and servers to appear in a message bar instead of in pop-up windows. For information about this configuration, see the *BMC Remedy Action Request System 7.6.04 Configuration Guide*. | ■ BMC Remedy Asset Management  
■ BMC Remedy Change Management  
■ Release Management  
■ BMC Remedy Incident Management  
■ BMC Remedy Problem Management  
■ BMC Remedy Knowledge Management  
■ BMC Service Request Management  
■ BMC Service Level Management |
<table>
<thead>
<tr>
<th>Description</th>
<th>Affected applications and modules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using the Application Preferences settings, you can configure the system to</td>
<td>■ BMC Remedy Change Management</td>
</tr>
<tr>
<td>display a confirmation message when you submit a new record. For information</td>
<td>■ Release Management</td>
</tr>
<tr>
<td>about these settings, see your application's user guide.</td>
<td>■ BMC Remedy Incident Management</td>
</tr>
<tr>
<td></td>
<td>■ BMC Remedy Problem Management</td>
</tr>
<tr>
<td></td>
<td>■ BMC Service Request Management (work order)</td>
</tr>
<tr>
<td>To provide easier access to the BMC Service Management Process Model (SMPM)</td>
<td>■ BMC Remedy Asset Management</td>
</tr>
<tr>
<td>from the applications, the Process Overview link is available from the Quick</td>
<td>■ BMC Remedy Change Management</td>
</tr>
<tr>
<td>Actions navigation area of the main forms. The Process Overview link is also</td>
<td>■ BMC Remedy Incident Management</td>
</tr>
<tr>
<td>available above the main tables on the consoles.</td>
<td>■ BMC Remedy Problem Management</td>
</tr>
<tr>
<td>To improve overall system performance, most consoles and forms now open</td>
<td>■ BMC Remedy Service Request Management (work order)</td>
</tr>
<tr>
<td>inside a single view area, instead of in individual windows.</td>
<td>■ BMC Remedy Knowledge Management</td>
</tr>
<tr>
<td>To make navigation through the BMC Remedy ITSM suite of applications easier,</td>
<td>■ BMC Remedy Asset Management</td>
</tr>
<tr>
<td>a more consistent navigation model is used on the IT Home Page, consoles,</td>
<td>■ BMC Remedy Change Management</td>
</tr>
<tr>
<td>and forms. For example, the application menu that appeared on the IT Home</td>
<td>■ BMC Remedy Incident Management</td>
</tr>
<tr>
<td>page in earlier releases of the BMC Remedy ITSM suite of applications is now</td>
<td>■ BMC Remedy Problem Management</td>
</tr>
<tr>
<td>used on all of the application consoles and main forms.</td>
<td>■ BMC Service Request Management (work order)</td>
</tr>
<tr>
<td></td>
<td>■ BMC Remedy Knowledge Management</td>
</tr>
<tr>
<td>Description</td>
<td>Affected applications and modules</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| To make required fields more obvious, when you save a record, a red box outlines required fields that do not contain valid information. | ▪ BMC Remedy Asset Management  
▪ BMC Remedy Change Management  
▪ BMC Remedy Incident Management  
▪ BMC Remedy Problem Management  
▪ BMC Service Request Management |
| To improve usability, the number of steps needed to create a work info entry has been reduced. See the applicable application user guide for information about how to create work info entries. | ▪ BMC Remedy Change Management  
▪ BMC Remedy Incident Management  
▪ BMC Remedy Problem Management  
▪ BMC Service Request Management |
| To make searching for information across applications easier and more intuitive, a global search option is available. The search scans and retrieves information from the installed BMC Remedy ITSM applications and presents it in a readable, consumable format. See the applicable application user guide for information about how the global search function works. | ▪ BMC Remedy Asset Management  
▪ BMC Remedy Change Management  
▪ BMC Remedy Incident Management  
▪ BMC Remedy Problem Management  
▪ BMC Service Request Management (work order) |
| To make creating Relationships easier, a new link called Create Relationship to is available. See the applicable application user guide for information about how the link works. | ▪ BMC Remedy Change Management  
▪ BMC Remedy Incident Management  
▪ BMC Remedy Problem Management |
**Description** To help you find field-level details more easily, you can use the new Detail icon to display detailed information about the field's content. For example, if you click the Detail icon associated with the Customer field, the People form appears with information about the customer whose name appears in the field. This new feature replaces the hyperlinked field labels in earlier versions of the applications.

**Affected applications and modules**
- BMC Remedy Change Management
- Release Management
- BMC Remedy Incident Management
- BMC Remedy Problem Management
- BMC Service Request Management (work order)

**Description** To quickly access BMC Atrium Explorer from the Service and CI fields, you can click the new Explore CI icon.

**Affected applications and modules**
- BMC Remedy Asset Management
- BMC Remedy Change Management
- BMC Remedy Incident Management
- BMC Remedy Problem Management

**Description** To improve search capabilities, a new search icon is added to the fields that open a search dialog box or form.

**Affected applications and modules**
- BMC Remedy Change Management
- Release Management
- BMC Remedy Incident Management
- BMC Remedy Problem Management
- Task Management
- BMC Service Request Management (work order)

---

**Where to find features and fields that have moved**

This section lists features and fields that have moved from their previous locations on the user interface and provides you with their new location.

**On the console**

The following console features and links have moved.

- **KPIs** — You now access the KPIs by clicking the **KPIs** link in the **Functions** menu on the navigation pane.
- **Defined Searches** — You now access Defined Searches from the Filter By drop down menu at the top of the console.

- **Process Overview** — You now access Process Overview from a link above the console table.

- **Tool bar** — The Problem console tool bar is removed. The following tool bar functions have been retained and are available from other locations on the interface:
  - **Close** button — To close the application and return to the Home page, click the Home icon on the breadcrumb bar.
  - **New** mode — To invoke New mode, in the Navigation pane click New Problem.
  - **Modify** mode — To invoke Modify mode after you create a new problem investigation you must configure your application preferences appropriately. For information about how to do this, see “Setting application preferences” on page 114
  - **Search** mode — From the breadcrumb bar, return to the Problem console and use the Search function.

**On the form**

The following application form features and fields have moved.

- You now access these fields from the main body of the form:
  - **Assigned Group**
  - **Assignee**
  - **Vendor Group**
  - **Vendor Ticket Number**
  - **Status**
  - **Status Reason**
  - **Resolution**

- You now access the following links from the **Quick Action** section of the Navigation pane.
  - **Create Relationship to** — for creating relationships between the current record and other record types.
  - **Create Related Request** — for creating other record types.
— **Process Overview** — for opening a process flow diagram.

— Work information — Changes have been made to the work information entries are created in Best Practice view. For information about creating work information entries in this view, see “Adding work information notes” on page 124.

— Relationships — Changes have been made to the way you create relationships in the Best Practice view. For information about how to create relationships in this view, see “Defining relationships” on page 69

### About the IT Home Page

When you start the BMC Remedy IT Service Management Suite, the IT Home Page displays the Overview console by default. However, you can set up what you want to see on the IT Home Page. If you are a system administrator, you can configure the page for all users. Otherwise, you can configure your own user ID to see your views.

The following figure illustrates the functional areas of the IT Home Page.

**Figure 1: IT Home Page and its functional areas**

The following table describes each of the functional areas of the IT Home Page.
<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Page header</strong></td>
<td></td>
</tr>
<tr>
<td>Logout</td>
<td>Click <strong>Logout</strong> to exit the application.</td>
</tr>
<tr>
<td><strong>Breadcrumb bar</strong></td>
<td>The breadcrumb bar helps you keep track of the records you are viewing and helps with navigation. For more information about breadcrumbs, refer to “Navigating consoles, forms, and modules” on page 26.</td>
</tr>
<tr>
<td><strong>Global search</strong></td>
<td>Type in a word or a phrase in the search area, and the application will search across multiple forms for records that match your input. For more information about global search, refer to “Using Global search” on page 120.</td>
</tr>
<tr>
<td><strong>Navigation pane</strong></td>
<td></td>
</tr>
<tr>
<td>Functional area</td>
<td>Purpose</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Applications</td>
<td>Depending on your permissions and other installed applications, the following links are displayed. Use them to open applications.</td>
</tr>
<tr>
<td></td>
<td>■ Quick Links</td>
</tr>
<tr>
<td></td>
<td>■ AR System Administration</td>
</tr>
<tr>
<td></td>
<td>■ Analytics</td>
</tr>
<tr>
<td></td>
<td>■ BMC Atrium Core</td>
</tr>
<tr>
<td></td>
<td>■ BMC Atrium Integration Engine</td>
</tr>
<tr>
<td></td>
<td>■ Administrator Console</td>
</tr>
<tr>
<td></td>
<td>■ Asset Management</td>
</tr>
<tr>
<td></td>
<td>■ Change Management</td>
</tr>
<tr>
<td></td>
<td>■ Change Management Dashboard</td>
</tr>
<tr>
<td></td>
<td>■ Contract Management</td>
</tr>
<tr>
<td></td>
<td>■ Product Catalog</td>
</tr>
<tr>
<td></td>
<td>■ Foundation Elements</td>
</tr>
<tr>
<td></td>
<td>■ Incident Management</td>
</tr>
<tr>
<td></td>
<td>■ Problem Management</td>
</tr>
<tr>
<td></td>
<td>■ Return On Investment</td>
</tr>
<tr>
<td></td>
<td>■ Release Management</td>
</tr>
<tr>
<td></td>
<td>■ Requestor Console</td>
</tr>
<tr>
<td></td>
<td>■ Task Management</td>
</tr>
</tbody>
</table>

*Note*: When you run your mouse over the applications, you see a second menu. You can select one of those options to go directly to a form. For example, roll over Change Management and select Change/Release Calendar. The Calendar screen appears.

<table>
<thead>
<tr>
<th>Configuration Buttons</th>
<th>Use these buttons to configure your panel display.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview console</td>
<td></td>
</tr>
</tbody>
</table>
### Functional area and Purpose

<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company and View By</td>
<td>These fields combine to provide a way to indicate the company name and the assigned-to categories filtering the records in the Console List table.</td>
</tr>
<tr>
<td>Refresh</td>
<td>This button refreshes the data in the table.</td>
</tr>
<tr>
<td>Preferences</td>
<td>This button allows you to set preferences for the console list table. You can remove columns, set refresh intervals, reset and save your preferences.</td>
</tr>
<tr>
<td>Console List table</td>
<td>This table lists the different types of requests.</td>
</tr>
</tbody>
</table>

### Configuring the IT Home Page

You can configure the IT Home Page to display information of your choice. For example, Bob Baxter is the Manager for payroll at Calbro Services. He likes to keep track of all potential problems, changes, and incidents pertaining to his department. He also tracks software license contracts so that he knows which ones are about to expire. Bob configures his panels to display all the information he is looking for, as follows:

- **Asset Management** => **Contracts About to Expire in 90 Days**
- **Change Management** => **All Open Changes with Extensive Impact**
- **Incident Management** => **All Open Incidents with Extensive Impact**
- **Problem Management** => **All Open Problems by Status and Priority**

#### To add or delete panels

You can specify how many panels to display on your IT Home Page up to a maximum of four panels.

1. In the IT Home Page, click the **Add panels to layout** button.
   
   Four panels appear.

2. To delete a panel, click the **Close** button on the panel.

#### To configure panels

You can select what to display on your IT Home Page.

---

**Note**

You can configure your panels only with options for which you have permissions.
1 In the panel, click the Show list and run your cursor over the list of options.

2 From the list of work areas for each option, select the one to display (for example, Asset Management => Software Certificates).

The panel displays your selection.

3 Repeat Step 1 to for your other panels.

To change display on a panel, click the Edit button to display the Show list, and make another selection.

4 Click the Save Current Layout button to save your IT Home Page.

A dialog box confirms that your customized layout has been saved.

5 Click OK.

When you next log in, you will see your saved IT Home Page.

**To expand and collapse panels**

1 In the panel, click the Collapse button. The panel will collapse. In the panel click the Expand button. The panel will expand to its original size.

**To restore a default IT Home Page view**

1 In the IT Home Page, click the Restore Default Layout button. A dialog box informs you that the default layout for this page will be brought back. Click OK to proceed or Cancel to retain your current layout. If you click OK, the panels on the IT Home Page disappear and the Overview Console is displayed.

**To hide or show the navigation pane**

1 In the IT Home Page, click the Applications button to hide or show the navigation pane.

**Consoles overview**

The following consoles provide access to all or a part of BMC Remedy Problem Management:

- Overview console
Problem Management console

Using the Overview console, specialists can view problem investigations that were assigned to them through the BMC Remedy Problem Management application. The specialist role is fulfilled by all IT employees and long term contractors, other than Service Desk Analysts and IT Operators. Specialists can also view work that was assigned to them through the other BMC Remedy IT Service Management applications with which BMC Remedy Problem Management integrates:

- BMC Remedy Incident Management
- BMC Remedy Asset Management
- BMC Remedy Change Management

The Problem Management console is the main console for the application. It provides problem coordinators and specialists with a single point from which they can create problem investigations, known error entries, and solution database entries. It also provides a place from which they can monitor the progress of problem investigations as the investigation moves through its lifecycle, and record work that was performed during the investigation.

Navigating consoles, forms, and modules

This section describes how to navigate around BMC Remedy ITSM consoles, forms, and modules.

In most cases, when you open consoles, forms, and modules from the IT Home page, they open inside the IT Home page view. Similarly, if you open a form from a console, the form replaces the console in the view.

If you open a related record from a form, the related record opens in the view that was occupied by the form. For example, if you are working with a problem investigation (the "parent" record) and from the parent record you open a related incident request, the incident request replaces the parent record in the view. If you then open a change request from the incident request, the change request replaces the incident request in the view, and so on. To help you keep track of the records you are viewing and to help with navigation, there is a breadcrumb bar across the top of the view field.

**Note**

Not all of the consoles, forms, and modules open in the view area. For example, CI records open in a new window. When a console, module, or form opens in a window, it is not added to the breadcrumb bar.
The breadcrumb bar contains links to the records that you opened from the parent record. When you open a record, the breadcrumb trail expands along the breadcrumb bar to the right, with the new link. If there are more than six links in the breadcrumb trail, arrows appear at one or both ends of the bar that let you scroll back and forward on the bar to see links not currently in the view.

The first link in the breadcrumb trail indicates the place from which you started. It can be a console or a form. For example, if you open a change request record directly from the IT Home page, the first link in the breadcrumb trail takes you to the change request.

The last link corresponds to the record currently in the view. If you open a link to the left of the record currently in view, the system truncates the breadcrumb trail to that link. The history is retained, however, so you can use the back and forward arrows in the navigation controls to move through the bar one record at a time. There is also a history of your most recently viewed records, which you can use to move directly to a record. Click the down arrow to open the history list.

**Note**

The Forward button is only visible after you move back down the breadcrumb bar by opening a link to a record that you previously viewed.

![Figure 2: The breadcrumb navigation buttons and bar](image)

If you are viewing a record from the middle of the breadcrumb trail and then branch off to another parent-type record, the system removes the forward breadcrumb trail from the point where you branched off and starts a new history from there, using the new parent-type record as the starting point. For example: You open a problem investigation, then open a related incident request, and from the incident request you open a related change request. If you go back to the incident request record and then open a second problem investigation, the breadcrumb bar no longer contains a link to the change request. The breadcrumb trail now shows the original problem investigation, the incident request, and the second problem investigation. It then shows any related records that you subsequently open from the second problem investigation.

When you close the parent record, the system removes the breadcrumb history.

**What happens to data as I move back and forth on the breadcrumb trail?**

If you are entering information into a record and open another record from the breadcrumb trail, the system prompts you to save the work, if you have not done so. If you do not save the information, the system does not preserve it on the record and you must re-enter it later.
If someone updates a record on your breadcrumb trail that is not currently in the view, those changes are visible to you when you open the record again.

**How does the breadcrumb trail behave with forms in Search mode?**

If you run a search from a form that is in Search mode, the last entry in the breadcrumb trail is the name of the form.

When you open a record from the search results table, that record does not appear in the breadcrumb trail. However, if you drill down through that record to open other related records, those related records will appear in the breadcrumb trail.

To return to the originating record, use the history list.

---

**Note**

All of the records that you open from a form in Search mode are added to the history list.

---

To return to the results table, click the name of the form in the breadcrumb trail.

**Can I force a second window to open?**

If you press the Shift key and then click a record entry in a console or in any search results table, the record opens in a second window. Also, if you hold the Shift key and click a link, button, and so on, the form or dialog box associated with the link or button opens in another window.

---

**Note**

If there is a record in the history list that you want to open in a second window, press the Shift key and then *double-click* the entry.

---

**Which consoles, forms, and modules open in a new window?**

Not all of the consoles, forms, and modules open in the IT Home page's view. The consoles, forms, and modules in the following list open in a new window. If you open one of these from the IT Home page, any unsaved changes to the IT Home page are lost.

---

**Tip**

Before you open any of these consoles, forms, or modules, save the changes to the IT Home page that you want to keep.

Problem Investigation form views

BMC Remedy Problem Management provides you with different ways to view the Problem Investigation and Known Error forms:

- Best Practice view (the default view)
- Classic view

Your view is configured for you by your system administrator. For information about configuring views, see the BMC Remedy IT Service Management Administration Guide for information about configuring views.

**Note**

If a procedure differs depending on the view, both methods are described. Instructions for the Best Practice view are provided first.

Best Practice view

In the Best Practice view, the fields most commonly used for updating, resolving, and closing problem investigations and for working with known errors are immediately visible. You can access additional, less frequently used functionality from the tabbed sections of the form or from the links in the Navigation pane.

The following list outlines the Best Practice view features:

- **Coordinator Group**—(Problem Investigation and Known Error forms) Use the Coordinator Group field to select a support group. The support groups that appear in the menu each have at least one member with the functional role of a
Problem Coordinator. From the Coordinator Group menu, you select the company, the organization, and then the support group. Only the selected support group name appears in the Coordinator Group field.

- **Problem Coordinator** — (Problem Investigation and Known Error forms) Use the Problem Coordinator field to select a Problem Coordinator for the problem investigation. The names that appear on this menu belong to the support group selected in the Coordinator Group field and have the functional role of Problem Coordinator.

- **Problem Location** — The Problem Location field specifies the location of the CI that is the focus of the problem investigation. The Location record includes the name of the client company, the region, the site group, and the specific site.

- **Known Error Location** — The Known Error location field specifies the location of the CI that is the focus of the knows error. The Location record is always the name of the problem coordinator company.

- **Service field** — (Problem Investigation and Known Error forms) The Service field relates business service configuration items (CIs) to the problem investigation or known error at the time it is created. All available business service CIs appear in the Service field menu and are only limited by the access levels of the person creating the problem investigation or the known error.

- **CI field** — (Problem Investigation and Known Error forms) The CI field specifies to which piece of infrastructure the problem investigation pertains. This field is can be configured to be a *required* field when you resolve an incident; however, you can specify the CI at any time in the problem investigation lifecycle.

- **Investigation Driver** — (Problem Investigation form) The Investigation Driver field specifies the reason for the investigation: High Impact Incident, Reoccurring Incidents, Non-Routine Incident, or Other.

- **Product and Operational Categorization** — (Problem Investigation and Known Error forms) If the problem investigation record is created from an incident request, the operational categorization and the product categorization fields are automatically filled, out based on the categorizations specified in the originating incident request. Likewise, when you create a known error from a problem investigation, the product categorization fields are automatically filled, based on the categorizations of the originating Problem Management record. If you are creating a new problem investigation or known error from within the BMC Remedy Problem Management application, or if the originating record did not specify a product categorization, the product categorization is filled automatically, based on the business service CI that you select in the Service field. You can also quickly select or change operational and product categorizations from the Quick Actions area of the Navigation pane by using the Select Operational and Select Product links. This makes sure the correct categorization information is used to manage the problem investigation.
The Best Practice view is recommended for all BMC Remedy Problem Management users, regardless of their role. For information about BMC Remedy Problem Management roles.

Figure 3: Problem console - Best Practice view

Icons used in the interface

This table describes the icons used on the consoles and in the Best Practice view of the application interface.

Table 2: Icon descriptions

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Detail icon" /></td>
<td>Detail—Displays detailed information about the field’s content. For example, if you click the Detail icon associated with the Customer field, the People form appears with information about the customer whose name appears in the field.</td>
</tr>
</tbody>
</table>
### Search
- Searches for field contents. This icon is associated with fields that have the ability to open a search dialog box or form.

### Explore CI
- Opens the BMC Atrium Explorer for the CIs selected in the Service and CI fields.

### Clear field contents
- Clears the contents of the field and allows you to make another selection. It does not delete the record.

## Classic view

The Classic view is the Problem Investigation form as it appeared in previous releases of BMC Remedy Problem Management. This view is provided for customers who are upgrading from earlier versions of BMC Remedy Problem Management and who are not yet ready to adopt the Best Practice view. The following fields have been added to the Classic view:

- **Service field** — (Problem Investigation and Known Error forms) The Service field relates business service configuration items (CIs) to the problem investigation or known error at the time it is created. All available business service CIs appear in the Service field menu and are only limited by the access levels of the person creating the problem investigation or the known error.

- **CI field** — (Problem Investigation and Known Error forms) The CI field specifies to which piece of infrastructure the problem investigation pertains. This field can be configured to be a *required* field when you resolve an incident; however, you can specify the CI at any time in the problem investigation lifecycle.

## User interface standards for field labels

On BMC Remedy ITSM forms, field labels provide data entry hints.

Table 3 on page 32 lists the significance of field-label formats and special characters.

### Table 3: Significance of field labels for data entry

<table>
<thead>
<tr>
<th>Field-label format or special characters</th>
<th>Significance for data entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bold label followed by an asterisk (*)</td>
<td>Field is required to submit and update the form. <em>Note</em>: If you leave the field blank when you attempt to submit the form, the field is highlighted with a red border.</td>
</tr>
<tr>
<td>Field label not bolded</td>
<td>Field is optional.</td>
</tr>
</tbody>
</table>
In the BMC Remedy ITSM documentation set, a fictional company named Calbro Services helps explain how BMC Remedy ITSM principles and procedures are used in practice.

Although Calbro Services is a fictional company, it is based on research of actual BMC Software customers. Learning how Calbro Services manages common IT Service Management scenarios should prove useful as you use the BMC Remedy ITSM applications in your own environment.

Calbro Services, a large, global company, is headquartered in New York City and publicly traded on the New York Stock Exchange. The company has 27,000 employees in 240 offices located in 20 countries. Table 4 on page 33 describes key business services in Calbro Services.

Table 4: Key business services

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online banking</td>
<td>500 ATMs in major cities</td>
</tr>
<tr>
<td>WWW presence</td>
<td>Corporate site and online brokerage services</td>
</tr>
<tr>
<td>Discount equity brokerage</td>
<td>Online and storefront services</td>
</tr>
<tr>
<td>Sales force automation</td>
<td>Automated sales activities such as leads, orders, reports, and so on</td>
</tr>
<tr>
<td>Customer support</td>
<td>Support centers in the United States, Europe, and Asia</td>
</tr>
<tr>
<td>Mass marketing</td>
<td>World-wide marketing campaigns aimed at making Calbro Services a household name</td>
</tr>
</tbody>
</table>
Problem management user roles

BMC Remedy Problem Management provides functionality for the following SMPM defined problem management roles:

- **problem coordinator** — The problem coordinator is a management role. For a detailed description of this role, see Problem coordinator on page 34.

- **specialist** — The specialist is a support staff role. For a detailed description of this role, see Specialist on page 35.

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

The following figure illustrates the different SMPM problem management process roles. It also shows where each role fits into the lifecycle of a problem investigation. For general information about the problem investigation lifecycle, see Process flow and the lifecycle of a problem investigation on page 36.

The relationship between specific problem management roles and the individual stages in the lifecycle are explained in the following sections:

- Performing the incident request review on page 63
- Performing the root cause analysis on page 79
- Performing the analysis review on page 93

**Problem coordinator**

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

**Note**
Problem coordinators require at least the permission of Problem User to access BMC Remedy Problem Management. In addition, they must have the functional role of Problem Coordinator to perform the problem coordinator’s duties.

Their responsibilities include:
reviewing the incident requests that have been related to the services for which they act as the problem coordinator, to help identify problems.

ensuring that the problems for which they are responsible, including the ones that have been identified within the Availability and Capacity Management processes, progress through the problem management process in a timely and prioritized fashion.

ensuring that the information entered in the problem investigations and known errors that they manage is accurate and complete.

reviewing periodically their problem investigations for which a practical structural solution can not be found.

verifying structural solutions and closing the known errors and problem investigations that they manage.

**Specialist**

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

Their responsibilities include:

- suggesting workarounds for problems.
- establishing the root causes of identified problems.
- proposing structural solutions (that is, permanent solutions) for problems.
- implementing structural solutions for problems if the Change Management process is not required.
- updating the problem investigation with relevant information and status changes.

To complete tasks described in the specialist sections of this guide, individuals fulfilling the role of a specialist require Problem User” permissions to access the BMC Remedy Problem Management application. Permissions are assigned to individuals by the system administrator.

**Mapping permission groups to SMPM roles**

The following table lists the problem management roles that are defined in the SMPM and the equivalent permissions that each role needs in BMC Remedy Problem Management to complete the relevant procedural steps.
For more information about how SMPM roles map to BMC Remedy ITSM Suite, see the *BMC Service Management Process Model Role Mapping to BMC Remedy ITSM Suite* white paper.

**Note**

This section does not list all of the permission groups and functional roles defined in BMC Remedy Problem Management, only those that are mapped to SMPM roles.

### Table 5: BMC Remedy Problem Management role mapping

<table>
<thead>
<tr>
<th>SMPM role name</th>
<th>Calbro user</th>
<th>BMC Remedy Problem Management permission groups</th>
</tr>
</thead>
</table>
| Specialist             | Ian Plyment   | ■ Incident User  
                          | ■ Problem User  
                          | ■ Task User  
                          | ■ Infrastructure Change Viewer  
                          | ■ Asset Viewer |
| Problem Coordinator    | Bob Baxter    | ■ Problem User  
                          | ■ Incident Viewer  
                          | ■ Infrastructure Change Viewer  
                          | ■ Asset Viewer  
                          | ■ Functional Role: Problem Coordinator |

### Process flow and the lifecycle of a problem investigation

The Process Flow Status area displays the process flow of the problem investigation within the Problem Investigation form. A diagram shows the stages of a problem investigation in blue. The current stage of the investigation is highlighted in green. The status of the investigation is indicated both by color and text.
The following figure provides an overview of the problem investigation lifecycle, as described by SMPM. Each of the major steps in the diagram corresponds to a section in this guide, where the step and its associated tasks are explained in more detail.

**Problem management use cases**

This section describes common problem management use cases that you typically encounter as IT support staff. The Calbro Services user personas help to illustrate the use cases and overall ITIL good practices workflow; however, the use cases do not necessarily make reference to specific Calbro Service sample data.
Problem investigation resolution—change request

This user scenario describes how to resolve a problem investigation with a change request.

Bob Baxter, the Calbro problem coordinator, conducts an incident request review on the Calbro Order Processing System (OPS). In the course of the review, Bob discovers that several similar incidents related to the OPS occurred over the past six months. The resulting problem investigation determines that a change to the IT infrastructure is required. A known error is created making a request for change (RFC), which is assigned to Mary Mann, the change coordinator.

The change is approved by Mary, executed and verified by Ian Plyment, the specialist. The status of the Known Error is automatically marked as corrected.

Bob is notified that the change request has been completed. He notes the permanent corrective action in the problem investigation and changes its status to closed.

Note


Table 6 on page 39 describes the typical steps involved in this user scenario.
Table 6: Resolving a problem investigation with a change request

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator performs an incident request review: From the Incident console, the problem coordinator creates a custom search that has the following characteristics:  ■ Service = OPS  ■ Impact =&gt; 2-Significant/Large OR 1-Extensive/Widespread  ■ Last Resolved Date &gt;= 07/19/2009  Note: For the purpose of this example, assume today’s date is 01/19/2010. The Last Resolved Date used in this example, therefore, is six months ago. After running the search, the problem coordinator looks for incident request records that have not yet been linked to a problem investigation.</td>
<td>The problem coordinator, Bob Baxter, performs an incident request review on the OPS by querying the Incident Management system for incidents or recent changes related to the OPS. Bob discovers that over the past six months there were several similar incidents related to the OPS.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>From one of the incident request records that is related to the OPS server issue, the problem coordinator creates a problem investigation. The incident record’s details are copied from the incident request record to the Problem form, and a relationship is created between the problem investigation record and the incident request records. The problem coordinator completes the Problem form.</td>
<td>Bob wants to determine the root cause of these incidents, so he creates a problem investigation from one of the incident request records. Creating the problem investigation from an incident request record ensures that all of the relevant details are copied over from the incident request to the problem investigation.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>From the Problem form, the problem coordinator creates relationships between the problem investigation and all related incident requests. The problem coordinator creates a relationship between the problem investigation and the OPS server.</td>
<td>Bob then relates the remaining OPS incidents and the OPS CI to the problem investigation.</td>
</tr>
<tr>
<td>Role</td>
<td>Actions</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator assigns the problem investigation to the specialist.</td>
<td>Bob assigns the problem investigation to the specialist, Ian Plyment, to conduct a root cause analysis.</td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist accepts the assignment and performs the root cause analysis.</td>
<td>Ian accepts the problem investigation assignment and begins a root cause analysis. During the root cause analysis, he determines the physical server on which the OPS runs needs a memory upgrade and sends his root cause analysis to Bob.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator performs the analysis review:</td>
<td>Bob reviews and verifies Ian’s analysis. Bob then creates a Known Error, which serves two purposes: to identify the best workaround (temporarily routing the users to a redundant server) and to request a change for the memory upgrade on the primary OPS server.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator creates a known error:</td>
<td>Bob creates the known error directly from the problem investigation, which transfers all pertinent information to the known error. Bob assigns the known error to Mary Mann, the change coordinator.</td>
</tr>
<tr>
<td>Change coordinator</td>
<td>From the Known Error form, the change coordinator creates a change request.</td>
<td>Mary receives the known error and reviews it. She agrees that the change is required and creates a change request from the known error. Mary moves the record through the change request lifecycle.</td>
</tr>
</tbody>
</table>

Problem management use cases

40 BMC Remedy Service Desk: Problem Management User Guide
<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change coordinator</td>
<td>The change coordinator assigns the change request to a specialist.</td>
<td>On the change request record, Mary creates a task to implement the change, and assigns the change request to Ian Plyment, the specialist who will perform the work. The coordinator also relates the CI to the change request.</td>
</tr>
<tr>
<td></td>
<td>The change coordinator adds a task to the change request and relates the CIs to the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The change coordinator moves the change request to the Implement stage.</td>
<td></td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist performs the tasks and closes them:</td>
<td>Ian implements the change. When he finishes the last task, the system notifies Mary that the tasks are closed.</td>
</tr>
<tr>
<td></td>
<td>On the Change Management Support console, the specialist searches for assigned tasks.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The specialist opens the task record and performs the task. Then the specialist records information about performing the task and changes the status of the task to Closed.</td>
<td></td>
</tr>
<tr>
<td>Change coordinator</td>
<td>The change coordinator completes the change request:</td>
<td>After Mary coordinates the change implementation, she reassigns the known error to Bob for verification.</td>
</tr>
<tr>
<td></td>
<td>From the Change form, the change coordinator moves the change request to the Close stage.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The change coordinator enters the performance rating and the actual start and end dates.</td>
<td></td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator confirms that the change has solved the problem.</td>
<td>Bob is notified that the change was completed and verifies that it fixed the problem. He then changes the status of the problem investigation and known error to Closed.</td>
</tr>
<tr>
<td></td>
<td>Then, the problem coordinator sets the status of both the problem investigation and the known error to Closed.</td>
<td></td>
</tr>
</tbody>
</table>

**Problem investigation resolution—no change request**

This user scenario describes how to resolve a problem investigation without a change request.

Bob Baxter, the problem coordinator for the Calbro Services Payroll service, conducts a incident request review on this service. In the course of the review, Bob discovers that multiple incidents related to performance have occurred over the past six months. Bob assigns the problem investigation to a specialist, Ian Plyment. Ian’s problem investigation determines that the anti-virus software on the Payroll service server runs a complete scan of the server every ten minutes. Ian reconfigures the anti-virus software to run only once an hour. Ian then notifies Bob that he has
implemented a corrective action to solve the root cause. Bob verifies the corrective action and closes the problem investigation.

**Note**

BMC Remedy Incident Management and BMC Remedy Problem Management must be installed to follow this user scenario.

Detailed information about the individual actions mentioned in this user scenario are described in the *BMC Remedy Service Desk: Incident Management User Guide* and the *BMC Remedy Service Desk: Problem Management User Guide*.

Table 7 on page 42 describes the typical steps involved in this user scenario.

### Table 7: Resolving a problem investigation without a change request

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator performs an incident request review. From the Incident console, the problem coordinator creates a custom search with the following characteristics:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>■ Service = Payroll</td>
<td>Bob performs an incident request review by searching incident requests registered against the services for which:</td>
</tr>
<tr>
<td></td>
<td>■ Impact =&gt; 2-Significant/Large OR 1-Extensive/Widespread</td>
<td>■ He is the problem coordinator.</td>
</tr>
<tr>
<td></td>
<td>■ Last Resolved Date &gt;= 07/19/2008</td>
<td>■ That have not yet been linked to a problem investigation.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> For the purpose of this example, assume today’s date is 11/19/2008. The Last Resolved Date used in this example, therefore, is six months ago.</td>
<td>■ That have been resolved with a workaround.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator opens one of the incident request records related to the Payroll service performance issue, and creates a problem investigation. The incident record’s details are copied from the incident request record to the Problem form, and a relationship is created between the problem investigation record and the incident request records. The problem coordinator completes the Problem form.</td>
<td>Bob spots a trend—numerous performance-related incidents have been reported against the Payroll service. Bob creates a problem investigation record directly from one of the incident request records. Creating a problem investigation directly from an incident request record transfers all relevant information from the incident request and automatically establishes the relationship between the incident request and the problem investigation.</td>
</tr>
<tr>
<td>Role</td>
<td>Actions</td>
<td>Explanation</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator relates all the related incident requests to the problem investigation.</td>
<td>Bob then relates the other incident requests to the problem investigation.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator assigns the problem investigation to a specialist.</td>
<td>After creating the problem investigation, Bob assigns it to the specialist, Ian Plyment.</td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist accepts the assignment and performs the root cause analysis.</td>
<td>Ian accepts the problem investigation assignment and begins a root cause analysis. During the root cause analysis, he determines the anti-virus software on the server runs every ten minutes, which is causing the performance issues. Ian determines the more appropriate frequency for the anti-virus software to run is once an hour.</td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist implements the solution. The specialist changes the problem investigation status to Completed, change the status reason to Enhancement Request, and records details about the investigation.</td>
<td>Because the changes to the anti-virus software configuration do not meet the criteria for the change management process, Ian makes the necessary changes himself and then changes the status of the problem investigation to Completed. To complete the problem investigation, Ian must select a status reason.</td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist notifies the problem coordinator. The specialist confirms that the problem coordinator is set as the assigned problem coordinator. Then the specialist changes the status of the problem investigation to Assigned.</td>
<td>Ian notifies Bob about the results of the problem investigation and the corrective action he performed.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator performs the analysis review: On the problem investigation form, the problem coordinator reviews the work information and independently verifies that the changes have corrected the problem.</td>
<td>Bob performs an analysis review and double-checks that the problem has been corrected.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator closes the problem investigation: The problem coordinator reviews the problem investigation form to verify that the details are complete. When the problem coordinator is satisfied that the problem investigation form is complete and correct, the problem coordinator changes the status to Closed.</td>
<td>Bob closes the problem investigation.</td>
</tr>
</tbody>
</table>
Problem investigation resolution—change request roll back

This user scenario describes how to resolve a problem investigation by rolling back a change request.

Bob Baxter, the problem coordinator at the Calbro Service Desk, performs an incident request review by searching incident requests registered against the payroll service. He reviews the history of the associated CIs and recognizes a trend in problems that are related to common changes to a specific CI. He creates a change request to roll back changes that affect that CI.

A Request for Change (RFC) is submitted to Mary Mann, the change manager in Front Office Support, for approval.

The change is approved and successfully implemented by Ian Plyment, the Specialist. The change manager creates a Broadcast to alert users. Future incidents are successfully averted.

Note

Table 8 on page 45 describes the typical steps involved in this user scenario.
### Table 8: Rolling back a change

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator performs an incident request review:</td>
<td>Bob performs an incident request review by searching incident requests registered against the payroll service, for which he is the problem coordinator.</td>
</tr>
</tbody>
</table>
|                       | From the Incident console, the problem coordinator creates a custom search with the following characteristics: | ![Table 8: Rolling back a change](image)
|                       | ■ Service = Payroll                                                      | ![Table 8: Rolling back a change](image)
|                       | ■ Impact => 2-Significant/Large OR 1-Extensive/Widespread               | ![Table 8: Rolling back a change](image)
|                       | ■ Last Resolved Date >= 07/19/2009                                      | ![Table 8: Rolling back a change](image)
|                       | Note: For the purpose of this example, assume today's date is 11/19/2009. The Last Resolved Date used in this example, therefore, is four months ago. | ![Table 8: Rolling back a change](image)
|                       | The problem coordinator looks for incident request records that have not yet been linked to a problem investigation. | ![Table 8: Rolling back a change](image)
| Problem coordinator   | The problem coordinator opens an incident request that is related to the payroll service and creates a problem investigation. | Bob spots a trend – numerous incidents have been reported against the payroll server CI, which is critical to making that service available. He also discovers that the server recently was the subject of a change. Bob reviews the change related to the server and determines that the recent change to the CI was the root cause of those incident requests. Bob creates a problem investigation record directly from one of the incident request records, which transfers all relevant information from the incident request and automatically establishes the relationship between the incident request and the problem investigation. |
|                       | The incident record’s details are copied from the incident request record to the Problem form, and a relationship is created between the problem investigation record and the incident request records. | ![Table 8: Rolling back a change](image)
|                       | The problem coordinator completes the Problem form.                     | ![Table 8: Rolling back a change](image)
<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Problem coordinator      | The problem coordinator creates relationships between the problem investigation and all of the related incident requests.  
The problem coordinator creates a relationship between the problem investigation and the original change request that is responsible for triggering the incident requests.                                                                                     | Bob then relates the other incident requests, the original change request, and the CI to the problem investigation.                                                                                                             |
| Problem coordinator      | The problem coordinator creates a known error:  
The problem coordinator sets the **Status** field to **Completed** and the **Status Reason** field to **Known Error**.  
This opens the Known Error form and creates a relationship between the known error and the problem investigation.  
The problem coordinator completes information on the form. The problem coordinator enters his name as the assigned problem coordinator. The problem coordinator enters the change coordinator’s name as the known error assignee, and sets the status to **Assigned**. | Bob determines that the best way to prevent similar incident requests from recurring is to roll back the original change. To request the rollback, Bob creates a known error from the problem investigation. He assigns the known error to Mary Mann, the change coordinator. |
| Change coordinator       | The change coordinator opens the known error record and creates a change request.  
This opens the Change Request form and creates a relationship between the known error and the change request. It also copies information from the known error record to the change request record.  
The change coordinator completes the required information and saves the change request.  
The change coordinator moves the change request through the lifecycle until it is approved and the dates are set.  
To alert users about the rollback, the change coordinator creates a broadcast.                                                                                                                                   | Mary receives the known error and reviews it. She agrees that the rollback is required and creates a change request from the known error.  
Mary moves the record through the change request lifecycle.  
As part of the change request, the change coordinator creates a broadcast alerting users to the incorrect original change and the symptoms in the defective CI. The broadcast mentions the new change and the time when the CI will be unavailable—while the change is being executed. Finally, the broadcast explains that the change was necessary to avoid further incoming related incidents. |
<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change coordinator</td>
<td>The change coordinator assigns the change request to a specialist.</td>
<td>On the change request record, Mary creates a task to roll back the CI and assigns the change request to Ian Plyment, the specialist who will perform the work. The coordinator also relates the CI to the change request.</td>
</tr>
<tr>
<td></td>
<td>The change coordinator adds a task to the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The change coordinator relates the CIs to the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The change coordinator moves the change request to the Implement stage.</td>
<td></td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist closes the tasks after performing them:</td>
<td>Ian rolls back the change to the CI. When he finishes the last task, the system notifies Mary that the tasks are Closed.</td>
</tr>
<tr>
<td></td>
<td>From the Change Management Support console, the specialist searches for assigned tasks.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>After performing the task, the specialist records information about performing the task and changes the status to Closed.</td>
<td></td>
</tr>
<tr>
<td>Change coordinator</td>
<td>The change coordinator completes the change request:</td>
<td>Mary completes the change request record and removes the broadcast, because it is no longer relevant.</td>
</tr>
<tr>
<td></td>
<td>The change coordinator moves the change request to the Closed stage.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The change coordinator enters the performance rating and the actual dates of the change.</td>
<td></td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator closes the problem investigation and known error:</td>
<td>Bob is notified that the rollback was completed. Bob verifies that the rollback fixed the problem, and then changes the status of the problem investigation and known error to closed.</td>
</tr>
<tr>
<td></td>
<td>The problem coordinator confirms that the rollback has solved the problem with the payroll server.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The problem coordinator opens the problem investigation record and checks that the details are all correct, and then sets the status to Closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The problem coordinator opens the known error and sets the status to closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The problem coordinator records a summary of how the known error was resolved.</td>
<td></td>
</tr>
</tbody>
</table>

**Problem investigation—at an impasse**

This user scenario describes how to indicate a problem investigation at an impasse.
During Bob Baxter’s incident request review of the Calbro Payroll service, he
disCOVERS also that over the past six months multiple incident requests have been
registered related to slow searches against the Payroll service database. Bob assigns
the problem investigation to Ian. Ian’s problem investigation finds a defect in the
database management software that might be corrected by a future patch. Ian notes
the root cause, but because a permanent solution in not yet available, he moves the
problem investigation status to Pending. Bob performs periodic checks against
problem investigations with a status of Pending, to see if permanent solutions have
become available.

**Note**

BMC Remedy Incident Management and BMC Remedy Problem Management must
be installed to follow this user scenario.

Detailed information about the individual actions mentioned in this user scenario
are described in the *BMC Remedy Service Desk: Incident Management User Guide* and
the *BMC Remedy Service Desk: Problem Management User Guide*.

Table 9 on page 48 describes the typical steps involved in this user scenario.

**Table 9: Indicating a problem investigation at an impasse**

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Problem coordinator   | The problem coordinator performs an incident request review:
<pre><code>                    | From the Incident console, the problem coordinator creates a custom search that has the following characteristics: |
                    | ■ Service = Payroll                                                                      | Bob performs an incident request review by searching incident requests registered against the services for which: |
                    | ■ Impact =&gt; 2-Significant/Large OR 1-Extensive/Widespread                              | ■ He is the problem coordinator.                                             |
                    | ■ Last Resolved Date &gt;= 07/19/2009                                                        | ■ That have not yet been linked to a problem investigation.                  |
                    | **Note:** For the purpose of this example, assume today’s date is 11/19/2009. The Last Resolved Date used in this example, therefore, is six months ago. | ■ That were resolved with a workaround.                                     |
</code></pre>
<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator opens an incident request record that is related to the Payroll service search issue and creates a problem investigation. The incident record’s details are copied from the incident request record to the Problem form, and a relationship is created between the problem investigation record and the incident request records. The problem coordinator completes the Problem form.</td>
<td>Bob spots another trend—numerous incidents have been reported against the Payroll service related to the length of time it takes to run a search against the database. Bob creates a problem investigation record directly from one of the incident request records. Creating a problem investigation directly from an incident request record transfers all relevant information from the incident request and automatically establishes the relationship between the incident request and the problem investigation.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator relates all the related incident requests to the problem investigation.</td>
<td>Bob then relates the other incident requests to the problem investigation.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator assigns the problem investigation to a specialist.</td>
<td>After creating the problem investigation, Bob assigns it to Ian.</td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist accepts the assignment and performs the root cause analysis.</td>
<td>Ian accepts the problem investigation assignment and begins a root cause analysis. During the root cause analysis, he determines that the problem is with a defect in the database management software. Ian also determines that none of the database management software patches fixes this problem. The problem might be fixed in a future release.</td>
</tr>
<tr>
<td>Specialist</td>
<td>The specialist notifies the problem coordinator. The specialist verifies that the problem coordinator is assigned as problem coordinator. The specialist changes the problem investigation status to Assigned.</td>
<td>Ian notifies Bob that he has completed the root cause analysis and determined the problem is with the database management software. He also tells Bob that, currently, no patch from the database software vendor fixes the problem.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator performs the analysis review: The problem coordinator reviews the work information recorded on the problem investigation. The problem coordinator independently verifies that the specialist’s assessment of the impasse is correct.</td>
<td>Bob performs an analysis review and double-checks that Ian’s assessment of the situation is correct.</td>
</tr>
<tr>
<td>Role</td>
<td>Actions</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>The problem coordinator indicates that the problem investigation is at an impasse. The problem coordinator indicates why no further action can be taken against the investigation and changes the problem investigation status to Pending.</td>
<td>Because no current fix for the root cause is available, Bob determines that the problem investigation is at an impasse.</td>
</tr>
<tr>
<td>Problem coordinator</td>
<td>Periodically, the problem coordinator checks the problem investigations with a status of Pending. If a solution is now available, the problem coordinator reassigns the problem investigation to a specialist for follow-up and implementation. If a solution is still unavailable, the problem coordinator records information about the periodic check.</td>
<td>Bob performs periodic checks of all problem investigations with a status of Pending to determine if a solution has become recently available.</td>
</tr>
</tbody>
</table>
Working with the Overview console

The information in this section is for people who fulfill one or more of the following support roles:

- problem coordinators
- specialists

Use the Overview console if you must respond to, manage, or track individual or group work assignments from a variety of sources. For example, if your company runs the full BMC Remedy ITSM Suite, either you or the group you manage might receive work assignments from BMC Remedy Incident Management, BMC Remedy Problem Management, and BMC Remedy Change Management. From the Overview console, you can quickly get information about all your work assignments and perform the procedures that you use most often.

Functional areas

This section describes the functional areas of the Overview console.

Table 10: Overview console functional areas

<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview console header</td>
<td></td>
</tr>
<tr>
<td>Functional area</td>
<td>Purpose</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Show</strong></td>
<td>This field provides a filter by which you can manage the contents of the Console List table. The choices are:</td>
</tr>
<tr>
<td></td>
<td>■ <strong>All</strong> — Shows all records</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Submitted by Me</strong> — Shows all records submitted by you.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Assigned to Me</strong> — Shows all records assigned to you.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Assigned to My Selected Groups</strong> — Asks you to select one of the groups to which you belong, and then displays the records assigned to that group.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Assigned to all My Groups</strong> — Displays the records assigned to all of the support groups to which you belong.</td>
</tr>
<tr>
<td><strong>Refresh</strong></td>
<td>Refreshes the data in the tables.</td>
</tr>
<tr>
<td><strong>Navigation pane</strong></td>
<td></td>
</tr>
<tr>
<td><strong>View Broadcast, or New Broadcast</strong></td>
<td>Opens the broadcast dialog box, from where you can view, create, modify, and delete broadcasts.</td>
</tr>
<tr>
<td></td>
<td>When there are unread broadcast messages, this area displays a message: <strong>New Broadcasts</strong>, followed by the number of new messages. When there are new broadcast messages, the area also turns red.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you open the Overview console with no new broadcast messages, but the View Broadcast link is red, open the Application Preferences dialog box and make sure that a Console View preference has been selected.</td>
</tr>
<tr>
<td><strong>Functions</strong></td>
<td>Use the links in this area to do the following actions:</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Select Status Values</strong> — Use this link to open a dialog box from which you can filter the console to show only records that match the conditions that you specify. This filter works in conjunction with the Show field.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>My Profile</strong> — Allows you to change the information associated with your login profile. For example, if your title changes or if you move to a new office location, use this link to open the People form and update your title or location, and so on.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Application Preferences</strong> — Set your program preferences and options.</td>
</tr>
<tr>
<td><strong>IT Home Page</strong></td>
<td>Use this link to open the IT Home Page.</td>
</tr>
<tr>
<td><strong>ROI Console</strong></td>
<td>Use this link to open the Return on Investment (ROI) console.</td>
</tr>
<tr>
<td><strong>CMDB</strong></td>
<td>Use this link to open the BMC Atrium CMDB.</td>
</tr>
<tr>
<td><strong>Console list panel</strong></td>
<td></td>
</tr>
<tr>
<td>Functional area</td>
<td>Purpose</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Create</td>
<td>Creates a new record.</td>
</tr>
<tr>
<td>View</td>
<td>Displays a form containing detailed information about the selected record in the Console list table.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints the selected record.</td>
</tr>
<tr>
<td>Search for Ticket</td>
<td>Opens a dialog box from which you can select the type of ticket you are searching for. After you select the type of record from the menu, click the Select button to open a search form specific to the type of ticket you are searching for. <strong>Note:</strong> To see activity records and CI unavailability records, you must search for those tickets, because these records are not displayed in the Console List table.</td>
</tr>
<tr>
<td>Preferences</td>
<td>Using Preferences, you can control the appearance of the Console List table. For example, you can add or remove a column.</td>
</tr>
</tbody>
</table>
**Console list table**

The Console list table lists different types of requests. The types of requests that you can choose from depend on the applications that are installed.

A specific prefix identifies each type of request:

- **CRQ** — Identifies change requests. To view and define change requests, BMC Remedy Change Management must be installed.
- **RLM**—Identifies release requests. To view and define release requests, BMC Remedy Change Management must be installed.

- **TAS**—Identifies tasks.

- **SDB**—Identifies solution database entries. To view and define solution entries, BMC Remedy Service Desk must be installed.

- **INC**—Identifies incidents. To view and define incidents, BMC Remedy Service Desk must be installed.

- **PBI**—Identifies problems. To view and define problems, BMC Remedy Service Desk must be installed.

- **PKE**—Identifies known errors. To view and define known errors, BMC Remedy Service Desk must be installed.

- **PR**—Identifies purchase requisitions. To view and define purchase requisitions, BMC Remedy Asset Management must be installed.

You can also change the table’s contents by using the Company and View By filters at the top of the console.

---

**Selecting status values**

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

**To select status values**

1. From the Navigation pane, choose **Functions => Select Status Values**.

2. In the Select Status Values dialog box, select the status values for each category from the lists, then click OK to close the dialog box.

3. If the Assigned Work table does not refresh with the filtered records, click Refresh to reload the table’s contents.
Selecting status values
Working with the Problem Management console

The information in this section is for people who fulfill one or more of the following support roles:

- problem coordinators
- specialists

Using the Problem Management console, you can create, track, and close problem investigations, solutions, and known errors.

Functional areas

This section describes the functional areas of the Problem Management console

Table 11: Problem Management console functional areas

<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Console tab</td>
<td>If the KPIs tab is open, click the Console tab to return to the console.</td>
</tr>
<tr>
<td>KPIs tab</td>
<td>Click the KPIs link to select and to view the problem management flashboards. The flashboards that appear represent, in graphical format:</td>
</tr>
<tr>
<td></td>
<td>Process KPI—See Using the KPI flashboards later in this guide for information about using these flashboards.</td>
</tr>
<tr>
<td></td>
<td>Total Open Problems—Click either All Open or By Status and Priority.</td>
</tr>
</tbody>
</table>

Problem Management console header
<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadcrumb bar</td>
<td>A navigation aid that contains links to related records that you opened from the current problem investigation.</td>
</tr>
<tr>
<td>Breadcrumb navigation controls</td>
<td>Back button-Takes you back one link in the breadcrumb trail. Back button-Takes you forward one link in the breadcrumb trail. The Forward button is only visible if you have returned to a record on the breadcrumb trail that you previously viewed. Drop down menu-Contains links to all the records that you viewed from the current problem investigation, including records that are not currently visible in breadcrumb trail. Home icon-Takes you to the IT Home page.</td>
</tr>
<tr>
<td>Search</td>
<td>If you have BMC Remedy Knowledge Management installed, the Global search feature lets you search across multiple forms for records that match a key term. For more information about this feature, see “Using Global search” on page 120.</td>
</tr>
<tr>
<td>Show Filter By Magnifying glass icon More filters</td>
<td>This area contains the following fields: Show, Filter By and Search. These fields combine to provide a way that you can filter the problem investigation records in the Problem table. The Show field has a menu from which you select the basic criteria by which you want to filter the contents of the Problem table, the menu choices include: Submitted by me-all problem investigations created by you. All-all problem investigations, regardless of who created them. Assigned to me-all problem investigations assigned to you. Assigned to my group-all problem investigations assigned to a specific support group of which you are a member. If you select this, you are prompted to select the support group. Assigned to all my groups-all problem investigations assigned to all of the support groups of which you are a member. The Filter By field places conditions on the basic criteria that you choose in the Show field. This helps you manage the number of records returned by the Show field. If you select Assigned to me in the Show field and All Open &gt; All Priorities from the Filter By field, then the Problems table contains all open problem investigations, regardless of their priority, that are assigned to you. The magnifying glass icon opens the Manage My Searches dialog box from which you can edit, save, and delete custom searches. Saved custom searches appear in the My Searches node of the Defined Searches list. For more information about Manage My Searches, see “Creating a custom search,” later in this guide. More filters provides a way for you to further filter the contents of the Incidents table. If you still have a large number of records after using the Filter By field, click Advanced to open a dialog box that contains fields in which you can indicate even more precise information, such as product or operational categories. For example, using the advanced field you can add the product category Hardware to the filter. When added to the Show and Filter by fields, the Incidents table now contains all open hardware incidents, regardless of their priority, that are assigned to you. An active funnel icon appears beside More filters to show when a filter from this area is active.</td>
</tr>
</tbody>
</table>
# Functional areas

<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Click Refresh to update the console with the latest information.</td>
</tr>
</tbody>
</table>
| **Navigation pane**                   | **View Broadcast, or New Broadcast**  
Click this link to open the broadcast dialog box, from where you can view, create, modify, and delete broadcasts.  
When there are unread broadcast messages, this area displays a message: **New Broadcast**, along with the number of new messages. When there are new broadcast messages, the area also turns red.  
For more information about broadcasting messages, see Broadcasting messages.  
**Note:** If you open the Problem Management console with no new broadcast messages, but the View Broadcast link is red, open the Application Preferences dialog box and make sure that a Console View preference has been selected.  
For information about how to view and select Console View preferences, see Setting application preferences. |
<p>| Counts                                | This area shows the number of open, unassigned, and unacknowledged problem investigations and the number of open known errors according to the selection in the Show field. |</p>
<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functions</td>
<td>Use the links in this area to do the following actions:</td>
</tr>
<tr>
<td></td>
<td>■ New Problem — Create a new problem investigation record.</td>
</tr>
<tr>
<td></td>
<td>■ Search Problem — Search the database for problem investigation records.</td>
</tr>
<tr>
<td></td>
<td>■ New Solution — Create new solution database entries.</td>
</tr>
<tr>
<td></td>
<td>■ Search Solution — Search the database for solution database entries.</td>
</tr>
<tr>
<td></td>
<td>■ New Known Error — Create new known errors.</td>
</tr>
<tr>
<td></td>
<td>■ Search Known Error — Search the database for known errors.</td>
</tr>
<tr>
<td></td>
<td>■ My Profile — Set your profile.</td>
</tr>
<tr>
<td></td>
<td>■ Application Preferences — Set your application preferences and application options.</td>
</tr>
<tr>
<td></td>
<td>■ Reminders — View and create reminders.</td>
</tr>
<tr>
<td></td>
<td>■ Reports — Create and run custom reports.</td>
</tr>
<tr>
<td></td>
<td>■ Manage CIs — Search for information about specific CI types and gives you access to the CI records.</td>
</tr>
<tr>
<td></td>
<td>■ Manage Inventory — Access the Manage Inventory form of BMC Remedy Asset Management.</td>
</tr>
<tr>
<td></td>
<td>■ KPIs — Click the KPIs link to select and to view the problem management KPI flashboards. The flashboards that appear represent, in graphical format: Process KPI — See Using the KPI flashboards later in this guide for information about using these flashboards. Total Open Problems — Click either All Open or By Status and Priority.</td>
</tr>
<tr>
<td>Applications</td>
<td>This area contains links to other BMC applications, consoles, and modules. The contents of this area depend on what other applications and so on are installed. Click the double greater-than sign to open or close this panel.</td>
</tr>
<tr>
<td>Problems table</td>
<td>Create — Opens a dialog box from which you can select to create either a Known Error, Problem Investigation, or Solution Database record.</td>
</tr>
<tr>
<td></td>
<td>View — Opens the Known Error, Problem Investigation, or Solution Database record selected in the Problems table.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Functional area</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process overview</td>
<td>If the full SMPM application is installed, opens the detailed SMPM Problem Management process. Otherwise, it opens a high-level diagram of the problem management process.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints the details of the Known Error, Problem Investigation, or Solution Database record selected in the Problems table.</td>
</tr>
<tr>
<td>the table</td>
<td>Displays high-level details about the records that match the criteria specified in the Company and Assigned To fields, or that were found by the most recently completed search.</td>
</tr>
</tbody>
</table>

**Details and Tasks**

**Details** — When selected, contains detailed information about the record selected in the Problems table. To see Details when the Tasks table is showing, click Show Details. The Create, View, and Report icons relate to work information notes. For information about working with work information notes, see Creating Work Information entries, later in this guide.

**Tasks** — When selected, lets you view tasks associated with the record that is selected in the Problems table. To see Tasks when Details is showing, click Show Tasks.
Performing the incident request review

The information in this section is for people who fulfill the role of problem coordinator.

The tasks described by this section are organized according to the stages of the problem management lifecycle as described by the BMC Service Management Process Model (SMPM).

Incident request review process

The incident request review is the first process in the problem management lifecycle. You perform incident request reviews periodically, according to your organization’s schedule. When performing an incident request review, you analyze incident request information to identify potential problems in the services you are responsible for. This information is most often obtained from the BMC Remedy Incident Management application. However, incident information can also come from specialists who have resolved incident requests with a workaround and who think the incident might recur if the root cause is not removed quickly.

After you identify a problem, create a new problem investigation. You link the problem investigation to the incident requests that were caused by the problem. You can also create a problem investigation from an incident request in the Incident Management application (see the BMC Remedy Service Desk: Incident Management User Guide for information about how to do this).

Tip

Creating a problem investigation from an incident request automatically creates a relationship between the incident request and the newly created problem.

You then assign the new problem investigation to a specialist for analysis. When assigning the problem investigation, choose a specialist whose skills, availability, and access rights make them the most appropriate person to perform the analysis.
If you find an incident request during the incident request review for which a problem investigation has already been registered, you should link the incident request to the problem investigation.

**Figure 7: Incident request review**

**Generating an incident request review**

The first step in the incident request review process is to generate an incident review overview. The overview helps you to identify problems that need to be investigated.

When generating the incident request overview, consider selecting all incident requests that have:

- been linked to the service infrastructures, or business service records, for which you are the problem coordinator.
- their Impact field set to 2-Significant/Large” or higher.
- been resolved in the past four months.
- not yet been linked to a problem investigation and were resolved with a workaround.
If a specialist notifies you of a new problem, create an overview that includes the incident requests referred to by the specialist, and any similar incident requests.

After you generate an overview of unreviewed incident requests using the search criteria outlined in the preceding list, review the individual incident requests. When reviewing the incident requests, consider the following points when deciding whether the incident request should be linked to a problem investigation:

- Was the root cause of the incident request removed when the incident request was completed?

- Was the incident request significant? Consider an incident request significant when:
  - the service outage involved more than one person.
  - there were multiple occurrences.
  - you believe the incident might recur.

- Has the underlying problem already been identified? If it has, link the incident request to the problem.

In addition, consider whether analysis of your organization’s capacity management or availability management systems indicates the potential for problems.

If the incident request requires a new problem investigation, generate the problem investigation and link the incident request to it as described earlier in this section. After you create the problem investigation, assign it to a specialist. For information about how to do this, see Assigning problem investigations on page 74.

Creating a problem investigation

After you identify an incident request that indicates a problem, create a problem investigation.

Problem investigations should be created from the BMC Remedy Incident Management application to ensure the information is copied from the incident request record to the problem investigation. See the BMC Remedy Service Desk: Incident Management User Guide for information about creating problem investigations from the BMC Remedy Incident Management application.
Viewing problem investigations

This section describes how to open a problem investigation after it is created. You open problem investigations anytime you need to update.

To view problem investigations

1. On the Problem Management console, from the Company list, select the company for which you want to view problem investigations.

2. From the View By list, select one of the following filters:
   - **Personal**—Displays records assigned to you.
   - **Selected Groups**—Prompts you to select any support groups to which you belong. You can select to display all records assigned to your group, or records assigned to your group that are not yet assigned to an individual.
   - **All My Groups**—Displays records assigned to all your support groups. You can choose to display all records, or records that are not yet assigned to an individual.

3. From the Defined Searches area, select **Problem Investigation => All Open Problems**.

4. To view additional details about an investigation, select the problem investigation record in the Problems table and then click **View**.

   The Problem Investigation form appears. You can modify the form and perform other actions, as appropriate.

Recording additional investigation information

You can use BMC Remedy Problem Management to record additional information about the problem investigation after you create it.

For example, when using the Best Practice view, you might add or change the Target Date to indicate the estimated date for the problem investigation’s resolution.

When using the Classic view, you might use additional classification information to determine whether to proceed with the investigation.

To record additional information by using the Best Practice view

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.
2 Click the calendar icon beside the Target Date field.

**Note**
The Target Date field is a required field when the problem investigation’s status is not Draft.

3 Select the target resolution date and time.

4 Click **OK**, then click **Save**.

**To record additional information by using the Classic view**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the **Classification** tab.

3 Select an investigation driver.

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

5 Enter the target resolution date.

6 Click **Save**.

**Indicating impacted areas**

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

**To indicate impacted areas**

1 With the relevant Problem Investigation form open, from the Navigation pane, choose **Advanced Functions => Impacted Areas**.

2 In the Impacted Areas Update dialog box, select the area, and click **Add**.

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

3 When you finish adding areas, click **Close**.
Relating incident requests and problem investigations

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

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

- Configuration item (CI)
- Incident request
- Solution database
- Known error
- Another problem investigation
  
  Additionally, if your environment runs BMC Remedy Asset Management and BMC Remedy Change Management, a problem investigation can also be related to the following record types:

- Configuration item (CI) unavailability
- Infrastructure change
  
  A known error can be related to any of the following record types:

- Configuration item
- Incident request
- Solution database
- Another known error
- Problem investigation

If you have Change Management, a known error can also be related to infrastructure change or a release record.
Note
You cannot define a relationship from a solution database record to another record type. You can only define a relationship to a solution database record from another record type. For example, from an open incident request, you can create a relationship to a solution database record. You cannot, however, create a relationship from an open solution database record to an incident request.

Defining relationships

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

To define a relationship—Classic view

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the Relationships tab.

3 From the Request Type list at the bottom of the Relationships tab, select the type of record to which you want to relate the current record. For example, to relate your problem investigations to a configuration item, select Configuration Item from the Request Type list.

4 Click Search.

5 Complete the search criteria tabs with the relevant information, then click Search. Note
Try to supply as much information as possible in the search dialog box to reduce the overall number of records returned by the search.

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

7 From the Relationship Type list at the bottom of the search dialog box, select the type of relationship you want to create. For example, if you are relating a problem investigation to a CI that is impacted by the problem, you might select Impacts. Note
The contents of the Relationship Type list depends on the type of record you are trying to create the relationship with.
8 Click **Relate**.

An information message appears confirming the relationship.

9 Click **OK** to dismiss the dialog box and then click **Close** to close the search dialog box.

**To define a relationship-Best Practice view**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 From the Quick Action area, click the arrow beside **Create Relationship to**.

3 From the menu, select the type of record to which you want to relate the current record.

For example, to relate your problem investigations to an incident request, select **Incident**.

---

**Note**

If your system has BMC Remedy Knowledge Management Installed, continue with this procedure. Otherwise, complete the procedure described in “To define a relationship-Classic view” on page 69 starting at Step 5.

---

4 In the Search field of the dialog box that opens, type a search string. For example, if you are creating a relationship to an incident request about a printer that regularly goes off-line, you might type **printer off line**.

The search scans multiple fields in each record looking for a match, and returns a list of records that contain the phrase "printer off line" in one of the scanned fields.

---

**Note**

The type of search dialog box that appears depends on the type of record you chose from the menu.

---

**Tip**

Try to supply as much information as possible in each type of search to reduce the overall number of records returned by the search. If, after using a more specific search string, the search returns too many records, consider using the advanced search. To do this, click Use Advanced Search, which opens a form in search mode that is relevant to the type of relationship you are making. This search behaves the same way as the search described in To define a relationship-Classic view, above.
5 From the search results table, select the item with which you want to create the relationship.

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

---

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

---

7 Click **Relate**.

An information message appears confirming the relationship.

8 Click **OK** to dismiss the dialog box and then click **Close** to close the search dialog box.

---

**Copying relationships**

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

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

---

**Note**

You cannot use this procedure to copy related CIs.

---

**To copy relationships**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the **Relationships** tab.

3 In the Relationships table, select a record related to the current problem investigation.
4 From the Quick Actions list at the bottom of the Relationships tab, select Get Related Relationships, then click Execute.

5 From the table of related records on the Copy Related Relationships form, select the other record that you want to relate to the current record.

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

6 Click inside the Relationship Type field.

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

7 From the list of relationship types, select the type of relationship you want to create, then click Select.

   Click OK to dismiss the note confirming the relationship creation.

8 Close the Copy Related Relationships form.

### Modifying relationships

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

Use the following procedure to modify the relationship.

**To modify a relationship**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the Relationships tab.

3 In the Relationships table, select the relationship you want to modify.

4 From the Quick Actions list at the bottom of the Relationships tab, select Modify Relationship Type, then click Execute.
5 On the Modify Relationships Type form, enter the new relationship details according to the on-screen instructions.

6 Click **Save** to save your changes.

### Performing quick actions on a relationship

You can perform many additional actions on a relationship. For a list of these actions, see the following tables.

**To perform a quick action**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the **Relationships** tab.

3 In the relationships table, select the relationship entry on which you want to perform the action.

4 From the Quick Actions list at the bottom of the Relationships tab, select the action you want to perform, such as Get Impacted Areas.

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

**Table 12: Effects of general relationship actions**

<table>
<thead>
<tr>
<th>Relationship action</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get Related Relationships</td>
<td>Copies the relationships of the selected record to the current problem investigation’s relationships.</td>
</tr>
<tr>
<td>Modify Relationship Type</td>
<td>Prompts you to modify the relationship type, as described in Modifying relationships on page 72.</td>
</tr>
</tbody>
</table>

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

**Table 13: Effects of relationship actions for related CIs**

<table>
<thead>
<tr>
<th>Relationship action</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explore CI</td>
<td>Opens a graphical relationship viewer that shows a selected CI’s relationship with other records.</td>
</tr>
<tr>
<td>Get CI Impact/Urgency</td>
<td>Copies the impact and urgency of the selected CI.</td>
</tr>
</tbody>
</table>
### Relationship action

<table>
<thead>
<tr>
<th>Relationship action</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get CI Product Categorization</td>
<td>Copies the product categorization from the selected CI to the classification of the current problem investigation.</td>
</tr>
<tr>
<td>Get Impacted Areas</td>
<td>Prompts you to select impacted areas, as defined in the selected CI, into the current investigation’s impacted areas.</td>
</tr>
</tbody>
</table>

5 Click **Execute**.

### Removing relationships

Use the following procedure to remove a relationship.

**To remove a relationship**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the **Relationships** tab.

3 In the Relationships table, select the relationship you want to remove.

4 Click **Remove**. Click **Yes** when the system prompts you to confirm the removal.

### Assigning problem investigations

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

**Note**

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

### Viewing unassigned investigations

A problem investigation might be assigned to your support group without being assigned to an individual.

View the unassigned problem investigations, then assign them as described in Specifying a problem coordinator for the problem investigation on page 75.
To view unassigned problem investigations

1 From the Defined Searches list on the Problem Management console, run Defined Searches => Problem Investigation => All Open Problems.

For more information about running predefined searches, see Running Defined Searches on page 117.

2 View the unassigned problem investigations in the Problems table.

Specifying a problem coordinator for the problem investigation

Problem coordinators are individuals who have the functional role of Problem Coordinator within the support group to which they belong. For details about functional roles, see the BMC Remedy IT Service Management Administration Guide.

To specify a problem coordinator using the Best Practice view

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 From the Coordinator Group menu, select the client company, organization, and support group that will coordinate the problem investigation.

After you specify the client company, organization, and support group, only the support group name appears in the Coordinator Group field.

3 From the Problem Coordinator menu, select the name of the person you want to assign as the problem coordinator.

4 Click Save.

To specify a problem coordinator using the Classic view

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the Assignment tab.

3 In the Problem Coordinator Assignment area, select the problem coordinator from the Assignee field.

- If you look at the Set Assignment Using menu and see that problem coordinator groups have been defined there, select the Pblm Mgr Default
Group from the Set Assignment Using list, then click Set. Then, select the problem coordinator from the Assignee field.

- To assign yourself as the problem coordinator, click My Default Group.

4 Click Save.

### Assigning an investigation to a specialist

You can assign the investigation to any specialist belonging to a support group.

For information about how to reassign the investigation to another support group or to an assignee in another support group, see Reassigning the problem investigation on page 96.

#### To assign an investigation to a specialist

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Indicate the appropriate assignee, as follows.

- To assign the investigation to yourself.

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>– In the Navigation pane, choose Quick Actions =&gt; Assign to Me.</td>
<td>– In the Navigation pane, choose Quick Links =&gt; Assign to Me.</td>
</tr>
</tbody>
</table>

- To assign the investigation based on predefined routing.

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>– In the Navigation pane, choose Quick Actions =&gt; Auto Assign.</td>
<td>– In the Navigation pane, choose Functions =&gt; Auto Assign.</td>
</tr>
</tbody>
</table>

- To assign the investigation to a specific person.
When using the **Best Practice view** | When using the **Classic view**
---|---
1. Click the **Work Detail** tab. | 1. Click the **Assignment** tab.
2. From the Assigned Group menu, select the support group. | 2. In the Problem Assignment area, select the appropriate assignee.
3. From the Assignee menu, select the name of the person you want to assign as the assignee. | 

3. Click **Save**.
Performing the root cause analysis

The information in this section is for people who fulfill the support role of specialist.

The tasks described by this section are organized according to the stages of the problem management lifecycle as described by the BMC Service Management Process Model (SMPM).

Root cause analysis

After a problem investigation is assigned to you for investigation, you perform a root cause analysis to determine the problem’s cause.

If the problem has caused one or more incidents, you first try to find a temporary workaround to restore normal service operation as quickly as possible. If a temporary workaround is available, update the problem investigation record with details about the workaround, including how to implement it. This information can be used later to resolve other incidents caused by the same or similar problems until a structural solution is found and implemented.

After assessing temporary workarounds, begin to investigate the root cause of the problem. After finding the root cause, you update the problem investigation with a description of the root cause.

After determining what is causing the problem, you investigate possible structural solutions. Ensure you add a description of each option to the problem investigation along with a recommendation for the preferred solution.

If you can perform a structural solution, implement the solution and then update the problem investigation with the solution. If the change management process is needed to permanently work around or solve the root cause, ensure you inform the problem coordinator that change management must be involved with the analysis.

If you cannot determine the problem’s root cause or cannot propose a structural solution, then record this in the problem investigation along with an explanation.
When you finish the root cause analysis, regardless of the outcome, you must inform the problem coordinator that your work is completed.

**Figure 8: Root cause analysis**

---

**Reviewing and updating the problem investigation**

When you are notified that a problem investigation is assigned to you and you are ready to start the root cause analysis, open the problem investigation record and set the status to Under Investigation. Fields on the record display information that was collected about the problem or the status of the problem investigation.

Review the information included in the problem investigation and any related records, to gain a clearer understanding of the problem’s, background, and how it is affecting the service infrastructures associated with it.
Note
If you receive an investigation that you think someone else is better suited to review, you can reassign it to that person. For information about how to do this, see Relating incident requests and problem investigations on page 68.

The tasks described by the following procedures are related to reviewing and updating the problem investigation.

Receiving notification of assignments

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

- BMC Remedy Alert
- Email

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

Viewing problem investigations assigned to you

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

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

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

Note
If you do not accept the assignment, reassign the investigation, as described in Reassigning the problem investigation on page 96.

To view problem investigations assigned to you

1   On the Problem Management console, from the View By list, select Personal.
Note
You can also view problem investigations assigned to other people in the support groups you belong to by selecting either Selected Groups, which enables you to select a subset of your groups, or All My Groups, which displays problem investigations for all the support groups you belong to.

2 From the Defined Searches area, select Problem Investigation => All Open Problems.

3 To view additional details about an investigation, select the problem investigation record in the Problems table and then click View.

The Problem Investigation form appears. You can modify the form and perform other actions, as appropriate.

Accepting an assignment

You can accept any investigation assigned to your support group.

To accept an assignment

1 Open the relevant problem investigation by selecting it from the Problems table and clicking View.

2 In the Navigation pane:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Choose Quick Actions =&gt; Assign to Me.</td>
<td>■ Quick Links =&gt; Assign to Me.</td>
</tr>
</tbody>
</table>

If you belong to more than one support group, you are prompted to select the group you want the problem investigation assigned to.

3 Select the support group.

4 From the Status field, select Under Investigation.

5 Click Save.
Searching for similar problem investigations

After accepting a problem investigation assignment, if you remember having worked on a similar problem investigation, you can use the Advanced Search feature to find it. Viewing similar problem investigations might help you find the root cause of your current problem investigation.

Tip

If you have access to BMC Remedy Knowledge Management, you can also use that application to help you find information to help with the problem investigation. For information about using BMC Remedy Knowledge Management, see Searching knowledge base entries on page 84.

To search for similar problem investigations

1. With the problem investigation record open, from the Navigation pane, choose Advanced Functions => Advanced Search.

2. In the Advanced Search Selection dialog box, select the type of search you want to perform, then click Select:

- **Search Problem Investigation by Work Info** — Searches for problem investigation using fields from the Work Detail tab (Work Info tab when using the Classic view).

- **Search Problem Investigation by Relationships** — Searches for problem investigations using fields from the Relationship form.

3. On the search form, provide as much information about the previous problem investigation as possible, and then click Search.

4. View the matching problem investigations in the table that appears.

Tip

If you are running BMC Remedy Problem Management from the BMC Remedy User client, you can use the advanced search bar to define a more complex set of criteria than you can specify by using only fields in a form. For example, you can search for all problem investigations with two different values in the same field. Thus, you can search for all problem investigations that have a status of Completed or Closed. For more information about using the advanced search bar, see the BMC Remedy User online help system. To access the help system from the BMC Remedy User tool bar, select Help => Contents and Index.
Searching knowledge base entries

If you have access to the BMC Remedy Knowledge Management application, you can author and search for solutions in a knowledge base. You can use the information in these knowledge base entries to help perform the root cause analysis.

To search the knowledge base

1. With the problem investigation record open, from the Navigation pane, choose Quick Actions (Quick Links in the Classic view) => Search Knowledge Base.

2. Complete the Knowledge Management search form that appears. For detailed information about how to use this application, see the BMC Remedy Knowledge Management User Guide.

Authoring knowledge base entries

When you finish the problem investigation, if you think that publishing the solution in the knowledge base can help future root cause analyses, you can do this from the problem investigation record.

To author a knowledge base entry

1. With the problem investigation record open, from the Navigation pane, choose Quick Actions (Quick Links in the Classic view) => Create Knowledge.

2. Complete the Knowledge Management authoring form that appears. For detailed information about how to use this application, see the BMC Remedy Knowledge Management User Guide.

Documenting work with a vendor

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

Note

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

To document work with a vendor when using the Best Practice view

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.
2 In the Vendor field, indicate the vendor’s name.
   ■ If the vendor is already defined, select the vendor.
   ■ If the vendor is not listed on the menu, type the vendor’s name.

3 If available, enter the Vendor Ticket Number.
   The Vendor Ticket Number is a tracking number issued by the vendor’s tracking system for the problem investigation that you are assigning to that vendor.

4 Click **Save**.

**To document work with a vendor when using the Classic view**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the **Assignment** tab.

3 For Assign to Vendor, select **Yes**.

4 Click the **Vendor** tab.

5 Complete the Vendor Information tab, as appropriate.
   ■ If the vendor is already defined, you can select the vendor.
   ■ If the vendor is not listed on the menus, you can type the vendor contact information.

---

**Note**
The Internet Email field is *only* informational. From this field, you can see who is currently working on the problem investigation and how to contact the vendor for an update.

6 Indicate the date that you assigned the investigation to the vendor.

7 Click **Save**.

### Proposing a temporary workaround

Problem investigations can be created proactively or reactively. A proactive problem investigation comes from your capacity management system and is created to avoid
incidents caused by capacity shortages. Reactive problem investigations are related to one or more incident requests.

If the problem investigation was created by the capacity management system, you can skip this step and go to Establishing the root cause on page 87.

If the problem investigation is related to one or more incident requests, try to find a workaround to resolve the incidents. You might find useful information about the Resolution tab of the related incident request record. See the BMC Remedy Service Desk: Incident Management User Guide for information about viewing incident request records.

If you identify a workaround, carefully describe it in the Workaround field of the problem investigation record. Until a permanent solution is found, this information can be useful to service desk analysts and other specialists working on similar cases.

**Note**

It is possible that a workaround from a previous analysis is already described in the Workaround field. If this is the case, review the workaround and update the description if necessary.

If you cannot find a practical workaround for the problem, make sure that you record this in a work information note on the Work Detail tab (Work Info tab when using the Classic view). For information about how to do this, see Adding work information notes on page 124.

**To record a workaround**

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.
2. Enter the workaround information:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 In the Workaround field, type a description of the workaround.</td>
<td>1 In the Process Flow Status area, click the Investigation and Diagnosis box, choose Generate Work Around/Root Cause.</td>
</tr>
<tr>
<td></td>
<td>2 In the Problem Investigation Workaround dialog box, type information in the Workaround field.</td>
</tr>
</tbody>
</table>

3. Click Save.
Establishing the root cause

In this step, you try to establish the problem’s root cause. Even if the problem investigation was triggered proactively by your organization’s capacity management system, you must determine why the service infrastructure is running out of capacity.

After you determine the root cause, take the following steps:

■ Describe the root cause on the problem investigation form.

■ If the root cause resides within a CI, relate the CI to the problem investigation. For information about how to do this, see Relating incident requests and problem investigations on page 68.

■ Look at the Workaround field to review any previously proposed workarounds. With the root cause now known, if necessary, propose a better workaround and describe how to implement it. For information about how to do this, see Proposing a temporary workaround on page 85.

If you cannot determine the root cause, you must record this also in a work information note on the Work Detail tab (Work Info tab when using the Classic view). See Adding work information notes on page 124 for information about how to do this. Make sure that you record why a root cause cannot be found, and be sure to record the activities that you performed to determine that a root cause cannot be determined.

Note

If the root cause analysis is temporarily unable to progress (for example, if you are waiting for information from a supplier), make sure you set the problem investigation’s Status field to Pending, and then specify why in a work information note on the Work Detail tab (Work Info tab when using the Classic view). See Adding work information notes on page 124 for information about how to do this.

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

After you record the root cause, the problem investigation can be completed as a solution entry or a known error, as described in Creating a solution entry on page 91 and Creating a known error on page 97.

To record the root cause

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2. Record the root cause:
### Proposing a structural solution

After you determine the problem’s root cause, if possible, determine the best way to permanently fix it. For example, if the problem is related to a CI that is still under warranty, contact the supplier for a replacement CI.

In a work information note on the Work Detail tab (Work Info tab when using the Classic view), describe the proposed structural solution. If there are multiple possible solutions, make sure you record all them. For information about how to do this, see Adding work information notes on page 124.

After determining the best solution, based on technical, financial, and availability considerations, use a work information note to record the preferred solution, providing details about how to implement it.

---

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a Work Detail note describing the root cause.</td>
<td>1 In the Process Flow Status area, in the Investigation and Diagnosis box, choose <strong>Generate Work Around/Root Cause</strong>.</td>
</tr>
<tr>
<td><strong>Note:</strong> For information about how to do this, see Adding work information notes on page 124.</td>
<td>2 In the Problem Investigation Workaround dialog box, select the root cause. <strong>Note:</strong> The Root Cause options available for the selection depend on the product and operational categorizations that are associated with the root cause. Root cause selections are configured by your administrator, as described in the <strong>BMC Remedy IT Service Management Administration Guide</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>3 Click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>

3 If a recent change is the root cause, and if BMC Remedy Change Management is installed on your system, relate the investigation to the change request with a Request Type of **Infrastructure Change**. For information about how to relate records, see Relating incident requests and problem investigations on page 68.

4 If a known error is the root cause, relate the investigation to the known error with a Request Type of **Known Error**. For information about how to relate records, see Relating incident requests and problem investigations on page 68.
If a service infrastructure change is required to resolve the problem, recommend that
the problem coordinator create a known error to coordinate the change through the
Change Management process. The Change Management process is required when:

■ Services become unavailable or is degraded during service hours.
■ The functionality of a service changes.
■ The BMC Atrium CMDB requires an update.

If you cannot find or implement a practical solution, make sure that you use a work
information note to record the reasons why a solution is not currently available.

Notifying the problem coordinator

If you have have a recommended structural solution after completing the root cause
analysis, but before you implement the structural solution, use the Problem
Investigation form to notify the problem coordinator that the problem has been solved.

To notify the problem coordinator

1. Open the relevant problem investigation as described in Viewing problem
   investigations on page 66.

2. Set the Assignee field to the name of the Problem Coordinator:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Make sure the Assignee field is set to the name of the problem coordinator.</td>
<td>■ On the Assignment tab, make sure the Problem Coordinator Assignment—Assignee field is set to the name of the problem coordinator.</td>
</tr>
</tbody>
</table>

3. From the Status field menu, select Assigned.

Implementing the solution

If you determine that a structural solution to the problem is available, or if you have
found a permanent workaround, implement it. After you implement the solution or
permanent workaround, record how the solution or permanent workaround was
implemented using a work information note on the Work Detail tab (Work Info tab
when using the Classic view).
For information about how to do this, see Adding work information notes on page 124.

# Resolving a problem investigation

After you implement the solution, resolve the problem investigation. The end result of the investigation might be a known error record or solution record.

## To resolve a problem investigation

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2. Change the Status to Completed.

   **Note**
   
   If and infrastructure change is required to permanently resolve the problem, then select Known Error from the Status Reason list in the next step.

3. Select the appropriate status reason.

   If you select Known Error or Solution Database, the details of the problem investigation are copied to a new known error or solution database entry when you save your changes.

4. Select the appropriate product categorization:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>■ In the Quick Actions area of the Navigation pane, click Select Product.</td>
<td>■ On the Classification tab, select the appropriate product categorization.</td>
</tr>
</tbody>
</table>

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

5. Select the product categorizations from the drop down menus in the Product Selection dialog box.

6. Click **Save** to save your changes.
The status of the investigation is set to Completed. If the status reason for the investigation is:

- **Known Error**, the Known Error form appears, and details from the problem investigation are copied into the form. Complete the form and save it, as described in Creating a known error on page 97.

  **Note**

  if an infrastructure change is required to permanently resolve the problem, then in the Known Error form, assign the known error to the Change Coordinator to have the change implemented.

- **Solution Database**, the Solution Database form appears, and details from the problem investigation are copied into the form. Complete the form and save it, as described in Creating a solution entry on page 91.

  **Note**

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

### Creating a solution entry

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

**Note**

Solution entries require that solution managers are defined. For details, see the BMC Remedy IT Service Management Administration Guide.

### To create a solution entry

1. With the Solution Database form open, as described in Resolving a problem investigation on page 90 complete the Solution Database entry as appropriate. A description of the various required fields is provided in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A brief summary of the solution.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>View Access</td>
<td>Select one of the following choices:</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Internal</strong> — Users within your organization can see the entry.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Public</strong> — Everyone with access to BMC Remedy Problem Management can see the entry, including users of the Requester console.</td>
</tr>
<tr>
<td>Details tab</td>
<td></td>
</tr>
<tr>
<td>Abstract</td>
<td>A brief description of the root cause and the solution.</td>
</tr>
<tr>
<td>Solution</td>
<td>A detailed description of the solution.</td>
</tr>
<tr>
<td>Assignment tab</td>
<td></td>
</tr>
<tr>
<td>Support Company</td>
<td>The support company to which the problem investigation was assigned.</td>
</tr>
<tr>
<td>Support Organization</td>
<td>The support organization to which the problem investigation was assigned.</td>
</tr>
<tr>
<td>Assigned Group</td>
<td>The support group to which the problem investigation was assigned.</td>
</tr>
<tr>
<td>Mappings tab</td>
<td></td>
</tr>
<tr>
<td>Organization—Company</td>
<td>Select the client company from the menu. If the solution applies to all client companies, then select <strong>-Global-</strong>.</td>
</tr>
<tr>
<td>Location—Company</td>
<td>Select the client company from the menu. If the solution applies to all client companies, then select <strong>-Global-</strong>.</td>
</tr>
<tr>
<td>Date/System tab</td>
<td></td>
</tr>
<tr>
<td>Submitter</td>
<td>Record the name of the person creating the Solution Database entry.</td>
</tr>
</tbody>
</table>

2. Click **Save**.
Performing the analysis review

The information in this section is for people who fulfill the management role of problem coordinator.

The tasks described by this section are organized according to the stages of the problem management lifecycle as described by the BMC Service Management Process Model (SMPM).

Analysis review

After the specialist completes a root cause analysis of the assigned problem investigation, you review the analysis.

If during the analysis review you determine that the specialist implemented a solution to the problem, you can start to close the problem investigation. For information about how to do this, see Closing the problem investigation on page 103.

You can close the investigation without a solution if you determine that the specialist thoroughly analyzed the problem, but was unable to find a root cause. If you determine the analysis was not adequate, then assign the problem investigation back to the specialist for further analysis, or reassign it to another specialist. For information about how to do this, see Reassigning the problem investigation on page 96.

If the specialist proposes a structural solution that requires change management, review the proposal to determine if this is an appropriate course of action. If you agree that a change is required to solve the problem, generate a known error and pass it to the Change Coordinator of the affected service. If you do not agree that a
change is required, assign the problem investigation back the specialist for further analysis, or reassign it to another specialist.

Figure 9: Analysis review

Reviewing the problem investigation

When specialists complete their root cause analysis, they assign the problem investigation to a problem coordinator to perform an analysis review.

As the assigned problem coordinator, you open the problem investigation and review the Work Detail tab entries (Work Info tab when using the Classic view). For information about how to do this, see Viewing work information notes on page 126.

During the review, determine whether the specialist:

- implemented a structural change.
- is recommending a service infrastructure change—which requires the Change Management process.
- was unable to find a root cause.
The following list of topics are covered in this section:

**When a structural change was implemented**

If the specialist implemented a change and if your review determines the root cause analysis was satisfactory, close the problem investigation.

For information about how to start this process, see Closing the problem investigation on page 103.

If you determine the root cause analysis was not satisfactory, reassign the problem investigation back to the specialist, or to another specialist for further investigation. For information about how to do this, see Reassigning the problem investigation on page 96.

**When Change Management is needed**

If the specialist recommends an infrastructure change that requires the involvement of Change Management, determine independently whether the proposed change is justified. This can save time in resolving the problem if Change Management is not really needed.

Change Management must be involved whenever:

- Services becomes unavailable or are degraded during service hours.
- Functionality of a service changes.
- BMC Atrium Configuration Management Database (BMC Atrium CMDB) requires an update.

If you agree that Change Management is needed, create a known error and assign it to the Change Coordinator. For information about how to do this, see Creating a known error on page 97.

Otherwise, reassign the problem investigation back to the specialist, or to another specialist for further investigation. For information about how to do this, see Reassigning the problem investigation on page 96.
When no root cause was found

If the specialist cannot find a root cause, make sure that the reason is recorded in a work information note on the Work Detail tab (Work Info tab when using the Classic view). Make sure, too, that the status of the problem investigation is set to Pending.

For information about adding work information notes, see Adding work information notes on page 124.

If you determine that the analysis was not adequate, reassign the problem investigation back to the specialist, or to another specialist for further investigation. For information about how to do this, see Reassigning the problem investigation on page 96 which follows.

Reassigning the problem investigation

If you determine the problem investigation was not adequate, disagree with the need for Change Management, or if Change Management rejects the known error, you reassign the problem investigation for further analysis.

You begin the reassignment process by explaining, using a work information note on the Work Detail tab (Work Info tab when using the Classic view), why the investigation is being reassigned. You then decide which specialist can perform a better analysis based on skill level, availability, and access rights.

After determining the most appropriate specialist, reassign the problem investigation. You can assign the investigation to either the original specialist or to another specialist.

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

To reassign an investigation

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2. To assign the investigation to yourself, in the Navigation pane, choose one of the following actions:
   - Quick Actions (Quick Links in the Classic view) => Assign to Me
   - Quick Actions (Quick Links in the Classic view) => Auto Assign
Auto Assign uses the automatic routing to assign the investigation based on predefined system mapping. Automated assignment can be based on the problem location, operational categorization, or product categorization.

3. Otherwise, follow these steps to reassign the investigation:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>To change the Assignee</td>
<td>1. Click the Assignment tab.</td>
</tr>
<tr>
<td>Select a new assignee from the Assignee list.</td>
<td>2. Reassign the investigation with one of the following options:</td>
</tr>
<tr>
<td>To change the Assigned Group</td>
<td>▪ Select the assigned group.</td>
</tr>
<tr>
<td>1 Select a new assigned group from the Assigned Group list</td>
<td>▪ After selecting an assigned group, select the assignee.</td>
</tr>
<tr>
<td>2 Select a new assignee from the Assignee list.</td>
<td>▪ Select from Set Assignment.</td>
</tr>
</tbody>
</table>

Note: Table 15 on page 97 describes the Set Assignment selections for the Problem Assignee area of the Assignment tab.

4. Click Save.

Table 15: Set Assignment selections for the Problem Assignee

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

Creating a known error

If you agree with the specialist’s recommendation that a change is the best way to remove the root cause of the problem, initiate the change by creating a known error and assigning it to the change coordinator of the affected service.
To create a known error

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2. Set the Status field to Completed and the Status Reason field to Known Error.

3. Click Save.

4. Click Yes, when prompted by the system.

This opens the Known Error form and creates a relationship between the known error and the problem investigation.

5. In the Notes field, enter a brief description of the known error and a detailed description of the change requirements.

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

7. Select whether view access is internal or public.

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

8. Select the client company:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>From the Known Error Location list, select the client company.</td>
<td>In the Known Error Details area of the Classification tab, select the company.</td>
</tr>
</tbody>
</table>

9. Select the appropriate operational categorization.

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

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the Quick Actions area of the Navigation pane, click Select Operational.</td>
<td>1. Click the Classification tab.</td>
</tr>
<tr>
<td></td>
<td>2. From the Operational Categorization fields of the Classification tab, select the operational categorizations by tier.</td>
</tr>
</tbody>
</table>

10. Select the appropriate product categorization.
Product categorization is based on a multi-tier hierarchy that is defined in your Product Catalog:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the Quick Actions area of the Navigation pane, click <strong>Select Product</strong>.</td>
<td>From the Product Categorization fields of the Classification tab, select the product categorizations by tier.</td>
</tr>
</tbody>
</table>

11 Make sure the assignments are correct.

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Make sure your support group appears in the Coordinator Group field.</td>
<td>1 Click the <strong>Assignment</strong> tab.</td>
</tr>
<tr>
<td>2 Make sure your name appears in the Problem Coordinator field.</td>
<td>2 Make sure that your name appears in the Assignee field in the Problem Coordinator Assignment area.</td>
</tr>
<tr>
<td>3 Make sure the Change Coordinator’s support group name appears in the Assigned Group field.</td>
<td><strong>Note</strong>: Your name appears in this field, because you are the problem coordinator.</td>
</tr>
<tr>
<td>4 Make sure the Change Coordinator’s name appears in the Assignee field.</td>
<td>3 Make sure that the Change Coordinator’s name appears in the Assignee field in the Known Error Assignment area.</td>
</tr>
</tbody>
</table>

12 Click the **Relationship** tab.

13 Ensure the known error is related to all the affected service infrastructure and to the CI in which the problem resides. For information about how to do this, see **Defining relationships on page 69**.

14 Ensure the Status is set to Assigned.

15 Click **Save**.

**Reviewing known error details**

If you submit a known error to change management, the Change Coordinator has the option to reassign the known error back to you if the Change Coordinator determines that the solution can be implemented within the problem management process.
If this happens, review the known error to determine why the Change Coordinator reassigned it, and then assign the problem investigation to the appropriate specialist. For information about how to do this, see Reassigning the problem investigation on page 96.

**To review a known error**

1. From the Defined Searches area of the Navigation pane on the Problem Management console, choose Known Error => All Open Known Errors.
2. Click Refresh.

   The Known Errors list refreshes with all open known errors for the selected Company and View By fields.
3. Select the known error and click View.
4. On the Known Error form, review the details as necessary.

**Monitoring a problem’s status**

The Process Flow Status area on the Problem Investigation form indicates the current stage and state of an investigation. When using the Classic view, the effort tracking feature records the history of assigned work that has been performed on the investigation.

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

For additional information about the process flow lifecycle, see Process flow and the lifecycle of a problem investigation on page 36.

In the Classic view, the investigation effort log attached to the Problem Investigation form lists all individuals who have worked on the problem during its lifecycle. This information is not system-generated; staff record this manually, as described in Recording effort spent on an investigation on page 128.

**Canceling a problem investigation**

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

1. Open the problem investigation.
2. Update the form, as appropriate.
3. Select **Canceled** in the Status field.
4. Select a status reason from the **Status Reason** list.
5. Click **Save**.
Closing the problem investigation

The information in this section is for people who fulfill the role of problem coordinator.

The tasks described by this section are organized according to the stages of the problem management lifecycle as described by the BMC Service Management Process Model (SMPM).

Closing the problem investigation

When you are notified by the specialist that the problem is solved, verify that the problem is solved. After you verify that the problem is solved, close the problem investigation and any associated known errors.

If the change was proposed but not implemented, or if the change did not fix the problem, determine if a different solution for the problem is available. If it is, then you can assign the problem investigation back to the specialist for further analysis, or reassign it to another specialist.

If thorough investigation and analysis reveals that currently there are no practical means to permanently work around or to solve the problem's root cause, update the problem investigation to indicate an impasse. After that, you must periodically
reassign the problem investigation to determine if new technology or if a different approach to the problem's root cause can provide a structural solution.

**Figure 10: Problem closure**

![Flowchart for Problem Closure]

---

**Verifying the structural solution**

When you are notified that a problem is resolved, open the problem investigation and any related known errors to review the information about the respective Work Detail tabs (Work Info tabs when using the Classic View).

You do this to determine which structural solution was implemented to resolve the problem. For information about how to do this, see Viewing work information notes on page 126.

After determining the nature of the structural solution, you must verify that the solution has solved the problem. One way to do this is to review the production test results. In cases where incidents caused by the problem under investigation exhibited only intermittent symptoms, the only way to verify the solution might be to monitor incident requests against the affected service, to see if any new incidents are being reported.
Closing the problem investigation and known errors

After verifying that the structural solution resolved the problem (a process that can take days or even weeks of monitoring), close the problem investigation and any related known errors.

**Note**

After you close a problem investigation, you can no longer modify it. Therefore, ensure that the root cause has been resolved and review all information about the problem investigation on the Problem Investigation form before you change the investigation's status to Closed.

**Note**

If you do not close the problem investigation or the known error within a specified period of time, BMC Remedy Problem Management automatically moves the status of the problem investigation or known error to Closed. The length of this period is configurable. Check with your system administrator to determine how much time your organization specifies. The default setting is 15 days.

**To close a problem investigation**

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2. Review the Problem Investigation form to verify that the details are complete.

3. From the Status list, select **Closed**.

4. Click **Save**.

   The status is changed to Closed.

**To close a known error**

1. From the Company and View By lists on the Problem Management console, select the appropriate **Company and View By** criteria.

2. From the Defined Searches area of the Navigation pane on the Problem Management console, choose **Known Error => All Open Known Errors**.

3. Click **Refresh**.

   The Problems table refreshes with all open known errors for the selected Company and View By fields.
4 Select the known error and click **View**.

5 On the Known Error form, set the Status field to **Closed**.

6 Record a summary of how the known error was resolved:

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type the summary in the Resolution field.</td>
<td>1 Click the <strong>Resolution</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>2 Type the summary in the Resolution field.</td>
</tr>
</tbody>
</table>

7 Complete any other fields that will help someone else viewing the record to understand how the known error was resolved.

8 Click **Save**.

## Indicating an impasse

If the specialist cannot find a root cause, or if the Change Management process rejected the known error, then the problem investigation is at an impasse and cannot be resolved. If this occurs, update the known error and the problem investigation records to indicate this is the case.

### To indicate a problem investigation impasse

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 In a work information note on the Work Detail tab (Work Info tab when using the Classic view), record why no further action currently is required. See Adding work information notes on page 124 for information about how to do this.

3 Set the Status field to **Pending**.

   **Note**

   If the problem investigation previously came to an impasse and the Status is already set to Pending, create a work information note indicating that a resolution is still not available. You must perform periodic checks of problem investigations at an impasse to see whether they can be resolved. For information about how to do this, see Performing periodic checks on page 107.

4 Click **Save**.
To indicate a known error impasse

1. To indicate a known error impasse, from the Defined Searches area of the Navigation pane on the Problem Management console, choose **Known Error => All Open Known Errors**.

2. Click **Refresh**.

   The Known Errors list refreshes with all open known errors for the selected Company and View By fields.

3. Select the known error and click **View**.

4. On the Work Detail tab of the Known Error form (Work Info tab when using the Classic view), create a work information note to explain why the problem was not fixed. See **Adding work information notes on page 124** for information about how to do this.

5. Set the Status field to Canceled.

6. Set the Status Reason field to No Longer Applicable.

7. Click **Save**.

Performing periodic checks

If a problem investigation results in an impasse, you must periodically check the problem investigation, to see if newer technology or another approach might provide a solution.

You can, for example, contact the supplier of the CI in which the root cause resides to see if the supplier has been able to determine a structural solution. You might also check websites that provide solutions for recognized, common errors or problems with specific versions of software or specific models of hardware.

If you determine that a structural solution or permanent workaround might now be possible, record this information in a work information note on the Work Detail tab and reassign it to a specialist for implementation (Work Info tab when using the Classic view); or if Change Management is required, create a known error. For information about how to do this, see **Reassigning the problem investigation on page 96** or **Creating a known error on page 97**.

If, after conducting the periodic check, it is apparent that a resolution is still not available, record this information in a work information note on the Work Detail tab.
(Work Info tab when using the Classic view). For information about how to do this, see Indicating an impasse on page 106.
Supplemental BMC Remedy Problem Management features

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

Using the KPI flashboards

The KPI flashboards graph problem management business processes against the problem management key performance indicators (KPIs).

The KPIs are described in BMC Remedy Problem Management KPIs on page 110. If you have BMC Service Management Process Model installed, you can also view the problem management KPI definitions there.

Tip
The BMC Service Management Process Model (SMPM) defines a key performance indicator as, A vital and measurable result to track the efficiency, effectiveness, and predictability of a process.”

The KPI flashboards component collects the data according to the selected customer company. Each KPI flashboards contains graphs that present the following types of information:

- **Relevant historical data** — Use this graph for trending purposes. The most recent historical data displayed in the graph is collected from the previous month. Historical data goes back to a maximum of one year.

Note
Historical data only appears in a graph when that historical data exists in the database. Typically, new or recent installations, or upgrades, of BMC Remedy Problem Management might not have historical data available.
Current, or real time data—Use this graph to see what is happening with the business process now. In most cases, the displayed real time data is collected from the first day of the current month to today’s date.

You can also view the individual problem investigation records that are reported by the real time flashboard graph. For example, you can view all of the problem investigation records that are reported by the Problem Backlog KPI flashboard. For information about how to do this, see Viewing and displaying data on page 112.

**Note**

KPI flashboards are available only for version 7.6.00 (and later) of the BMC Remedy ITSM applications. If you are running a mixed environment, that is, if you are running some BMC Remedy ITSM applications at version level 7.5.01 (or earlier), you see flashboards with only the version 7.6.00 (or later) applications.

---

**BMC Remedy Problem Management KPIs**

The following table lists and describes the problem management key performance indicators.

**Table 16: BMC Remedy Problem Management KPIs**

<table>
<thead>
<tr>
<th>KPI name</th>
<th>Description of graph content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incidents Reported</td>
<td>The number of registered incident requests with the Service Type set to User Service Restoration or Infrastructure Restoration.</td>
</tr>
<tr>
<td>Problem Backlog</td>
<td>The total number of problem investigations that do not have their Status field set to Closed.</td>
</tr>
<tr>
<td>Problem Management Activity</td>
<td>The number of new problems identified. The number of solved problems. That is, the number of problem investigations with their Status field set to Closed.</td>
</tr>
</tbody>
</table>

**KPI dashboard variables**

KPI flashboards use variables to fetch the data that is used to create the flashboard graphs for the selected company. In most cases, you can control what data appears in the graph.

The following table lists the KPI graph types and the active variable names, and describes the information they provide. This helps you to understand the effects of hiding or displaying a specific variable.
Table 17: KPI flashboards variables

<table>
<thead>
<tr>
<th>Graph type</th>
<th>Variable name</th>
<th>Data displayed by the variable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incidents Reported</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Historical        | PBM:PBI:KPI_ReportedIncidentsHistory              | The number of registered incident requests that had the Service Type set to User Service Restoration or Infrastructure Restoration during the shown reporting period.  
**Note:** This graph uses only one variable. Hiding this variable prevents the graph from displaying any information. |
| Real time         |                                                   | This real time graph does not use active variables. It displays the number of registered incident requests with the Service Type set to User Service Restoration or Infrastructure Restoration. |
| Problem Backlog   |                                                   |                                                                                                 |
| Historical        | PBM:PBI:KPI_BacklogHistory                        | The number of problem investigations that were still open during the shown reporting period.     
**Note:** This graph uses only one variable. Hiding this variable prevents the graph from displaying any information. |
| Real time         |                                                   | This real time graph does not use active variables. It displays the number of problem investigations that are still open. |
| Problem Management Activity |                                           |                                                                                                 |
| Historical        | PBM:PBI:KPI_ActivityHistory                      | The number of problem investigations that were still open during the shown reporting period.   
This data is shown in the blue portion of the graph. |
|                   | PBM:PBI:KPI_ActivityHistory_V1                   | The number of problem investigations that were closed during the shown reporting period.        
This data is shown in the yellow portion of the graph. |
| Real time         | PBM:PBI:KPI_Activity                             | The number of problem investigations that are still open. This data is shown in the blue portion of the graph. |
|                   | PBM:PBI:KPI_Activity_V1                         | The number of problem investigations that are closed. This data is shown in the yellow portion of the graph. |
Opening the KPI flashboards

Use this procedure to open the KPI flashboards.

To open the KPI flashboards

1. From the Functions area of the Navigation pane, click the KPI link.

2. From the Company list at the top, select the customer company for which you want to view KPI flashboards.

   **Note**
   Your access level determines the companies that you see in the Company list.

3. From the Navigation pane, choose Process KPIs => KPI_flashBoardLink

   KPI_flashBoardLink is the link to the specific KPI flashboard that you want to see.

   **Tip**
   Click the triangle beside the Process KPI text to open and close this area of the Navigation pane.

Viewing and displaying data

Controls on the open flashboard help you view and display the data. The actions that you can perform and the procedures that you use to perform them are described in the following table.

**Note**
Not all of the KPI flashboards support all of these procedures.

<table>
<thead>
<tr>
<th>Table 18: KPI flashboard actions and procedures</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
</tr>
<tr>
<td>View specific records used to create the real time KPI flashboard data</td>
</tr>
<tr>
<td>Use this procedure, for example, to view all of the problem investigation records that are reported by the Problem Backlog KPI flashboard. That is, you can see all of the records that do not yet have their Status field set to Closed for the reporting period. <em>This feature is not available on the historical data graph.</em></td>
</tr>
<tr>
<td>Action</td>
</tr>
<tr>
<td>-------------------------------</td>
</tr>
<tr>
<td><strong>Zoom a graph</strong></td>
</tr>
<tr>
<td></td>
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<td></td>
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<td></td>
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<td></td>
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<tr>
<td></td>
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<tr>
<td><strong>Hide or display the graph legend</strong></td>
</tr>
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<td></td>
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<td></td>
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<tr>
<td><strong>Change the graph style</strong></td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Change the graph titles</strong></td>
</tr>
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<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Hide or display active variables</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Action</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>View a graph in full-screen mode</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Viewing your profile

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

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

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

To modify your profile

1 From the Navigation pane of the Problem Management console, choose Functions => My Profile.

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

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

3 When you finish making the changes, click Save.

Setting application preferences

You can set preferences to:

- Set defaults for the consoles.
- Determine the action that occurs after you save a Problem investigation form.
Determine which console appears by default when you open BMC Remedy Problem Management.

**To set your preferences**

1. From the Navigation pane of the Problem Management console, choose **Functions => Application Preferences**.

2. Update the form as appropriate.

The following table describes the settings available on the form.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferences for</td>
<td>This is a read-only field that identifies the user.</td>
</tr>
<tr>
<td>Default Home Page</td>
<td>Select the console that you want to appear as your home page when you log into the BMC Remedy Action Request System (BMC Remedy AR System) server. For example, if you want the Problem Management console to appear, select Problem Management Console.</td>
</tr>
<tr>
<td>Company</td>
<td>Select the company that you want to appear by default in the Company field, which is found under the More Filters feature on the application's console.</td>
</tr>
<tr>
<td>Console View</td>
<td>The default console view, with the search criteria, controls which problem investigations appear in the Assigned Work area. You can temporarily change this setting from the Navigation pane of the console. The following list shows you the available selections:</td>
</tr>
<tr>
<td></td>
<td>- All — Lists all work being tracked by the BMC Remedy Problem Management application.</td>
</tr>
<tr>
<td></td>
<td>- Submitted by Me — Lists all work submitted by you.</td>
</tr>
<tr>
<td></td>
<td>- Assigned to Me — Displays work assigned to you.</td>
</tr>
<tr>
<td></td>
<td>- Assigned to My Selected Groups — Prompts you to first select a support group to which you belong and then displays the work assigned to that group.</td>
</tr>
<tr>
<td></td>
<td>- Assigned to All My Groups — Displays work assigned to all your support groups. You can choose to display all work, or work that is not yet assigned to an individual.</td>
</tr>
<tr>
<td>Confirm on Submit</td>
<td>Choose whether to display a confirmation message when you submit a new problem investigation record.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Console Page</td>
<td><strong>On Form Open</strong></td>
</tr>
<tr>
<td></td>
<td>■ <strong>Data Set Name</strong>—When multiple data sets exist, such as production and training data sets, select the appropriate data set.</td>
</tr>
<tr>
<td>Form</td>
<td><strong>After New Save</strong>—This setting controls the action after you click <strong>Save</strong> on the Problem investigation form. The following list shows the available selections:</td>
</tr>
<tr>
<td></td>
<td>■ <strong>New request after submit</strong>—Closes the newly created problem investigation, then opens a blank problem investigation form in New mode, ready for you to create a new problem investigation.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Modify request after submit</strong>—Saves the new problem investigation, but leaves the record open so that you can continue to work with it and add or change information.</td>
</tr>
<tr>
<td></td>
<td><strong>Tab Views</strong>—(Classic View only) You can choose whether to show the following panels:</td>
</tr>
<tr>
<td></td>
<td>■ Vendor</td>
</tr>
<tr>
<td></td>
<td>■ Financials</td>
</tr>
<tr>
<td></td>
<td>■ Date System</td>
</tr>
<tr>
<td>Overview console</td>
<td>You can choose whether to show problems, known errors, and solutions —and by which status, on the Overview console.</td>
</tr>
<tr>
<td>Role</td>
<td>You can also filter the entries by Role using one of the following selections (this filter works in conjunction with the other Overview console preferences you selected above):</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Assignee</strong>—Shows only problem investigations for which you are the assignee.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Problem Coordinator</strong>—Shows only problem investigations for which you are the Problem Coordinator.</td>
</tr>
</tbody>
</table>

3. Click **Save**.
Searching for records

From the Problem Management console, you can search for problem investigation records, known error records, and solution database entries.

To do this, you can run a series of predefined searches, search all of the records using the Problem Investigation Search form, or create and save your own custom searches using advanced qualifications.

Running Defined Searches

The Defined Searches are predefined searches that you can use to look for problem investigations, known errors, and solution database entries. For example, you can use a predefined search to search the database for all problem investigations that have a status of open.

You run this search from the Filter by menu at the top of the view area.

Note

You can view the support groups you belong to by clicking the My Profile link in the Navigation pane, then opening the Support Groups tab. For more information about this link, see Viewing your profile on page 114.

To run a defined search

1  Make sure the Show field at the top of the view area contains the correct entry for the search you need to run.

2  From the Filter By menu, select Defined Searches.

3  Open the search category that corresponds to the search you want to run and then select a specific search.

   For example, to see all open problem investigations, select Problem Investigation => All Open Problems.

4  Click the search name to run the search. In the previous example, you would click All Open Problems.

Tip

If the contents of the Problems table does not update after you run the search, click the Refresh button.
Creating a custom search

When you create custom searches using advanced qualifications, you can create searches with very specific search criteria, which you can save for reuse.

**Tip**
If you want the power of a custom search with advanced qualifications, but do not want to save the search, you can delete it.

**To create a custom search**

1. At the top of the console, click the magnifying glass beside the **Filter by** field.
2. In the Type field, select the type of record you want to search for.
3. In the Search Name field, type a name for the search.
4. Click **Build Search Qualification** to open the Advanced Qualification Builder dialog box, and then define the search qualification.
5. From the Keywords or Fields selection boxes, select the keywords or record fields on which you want to search.
   
   To insert operators (+, =, >, <, and so on), click the appropriate operator button. Do not forget to place literal values between double quotation marks.

   For example, if you are performing an incident request review and you are searching for incident requests that meet the following criteria:
   
   - Impact => 2-Significant/Large or 1-Extensive/Widespread
   - Service = Payroll Service
   - the Last Resolved Date >= 07/19/2009
   
   then the query would look like this:

   ```
   ('Impact' = '2-Significant/Large' OR 'Impact' = '1-Extensive/Widespread')
   AND 'Service' = 'Payroll Service'
   AND 'Last Resolved Date' >= '07/19/2009'
   ```

   **Note**
   Date formats can vary, depending on how your system is configured. The date shown here is only an example.

6. Click **Select** to close the Advanced Qualification Builder, and then click Save.
7. Close the Manage My Searches dialog box.
The search appears in the Defined Searches list, under the My Searches node.

---

**Note**

The My Searches node appears only when a custom search is defined.

---

**Editing or deleting the custom search**

After you create a custom search, you can edit the search parameters or you can delete the search entirely. Use the following procedure if you want to edit or delete the custom search.

**To edit or delete the custom search**

1. Open the Manage My Searches dialog box as described in the preceding procedure.
2. From the list of searches, select the search you are modifying or deleting.
3. Perform one of the actions described in the following table.

<table>
<thead>
<tr>
<th>To modify the search</th>
<th>To delete the search</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Edit the search as required.</td>
<td>1 Click <strong>Delete</strong>.</td>
</tr>
<tr>
<td>2 Click <strong>Save</strong>.</td>
<td>2 Click <strong>Close</strong>.</td>
</tr>
<tr>
<td>3 Click <strong>Close</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

**Searching all records**

An all records search looks through all the records that meet your search criteria, regardless of their associations to people or groups. You run this type of search by using the Search Problem link in the Navigation pane.

Use this type of search when you are looking for a record not associated with your ID or your group’s ID, or any time you must search all records.

**To search all records**

1. From the Navigation pane, choose **Functions => Search Problem**.
A form appears that enables you to perform the search. The form is laid out in a similar way to the Problem Investigation form, but contains some additional tabs and fields. You can use any of the tabs and fields in the form to specify your search criteria.

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

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

Note

The search criteria are persistent. This means that if you run a search and then close the BMC Remedy Problem Management application, the next time that you open the application and perform this procedure, the search criteria that you entered in this step are still present in the search form. They remain until you change or delete them.

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

When the search finishes, the search results list contains all the records that match the search criteria.

4 Scroll through the results list to find the specific records that you want.

Note

When you open a record from the search results table, it is added to the history list, but not to the breadcrumb bar. However, any related records that you open from the record do appear in the breadcrumb bar and get added to the history list.

Using Global search

If you have BMC Remedy Knowledge Management installed, you can use the Global search feature. Global search searches across multiple forms for records that match a word or phrase that you type in the search area.

To use Global search

1 In the text field to the right of the breadcrumb bar, type your search string and then click Search.

Figure 11: Global search
2 Locate the record you want in the search results table and double-click it.

The record opens in the viewing area and the system updates the breadcrumb trail with an entry for the record you opened.

**Note**
As you drill down through the record, each record you open is also added to the breadcrumb trail.
If you want to maintain the contents of the search results table to view later, do not change the text in the Search field. If you do, when you click the **Search** icon to return to the search results table, the search feature will execute a new search based on the changed content of the Search field.

3 To return to the search results table, click the **Search** icon again.

---

**Printing records**

You can print a copy of a record to keep for filing purposes or to share with someone who does not have access to BMC Remedy Problem Management.

Use this procedure to print a record.

**To print a record**

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

**Note**
If you already have the record open and want to print it, click **Print** at the bottom of the form to open the Business Objects Report Preview dialog box, then go to List item. on page 121.

2 Click **Print**.

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

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

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

4 Close the Business Objects dialog box.
Modifying records

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

To modify a record

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.
2. Click the tab or field that contains the information that you want to update.
3. Make the appropriate changes.
4. Click Save.

Tracking costs

Note
The Financials tab, from which you perform cost tracking, is available in the Classic view of the Problem Investigation form.

The Financials tab on the Classic view of the Problem Investigation form shows the financial effect of the problem on a company or site. Knowing how much an unresolved problem costs helps you determine whether and when to perform a formal problem investigation.

This tab displays Investigation Costs. If Asset Management is installed, this tab also displays Cost of CI Unavailability.

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

Note
The CI unavailability feature is available when BMC Remedy Asset Management is installed and is used to track both scheduled and unscheduled outages against CIs.
Recording the cost of working on an investigation

**Note**
Recording the cost of working on an investigation is performed from the Classic view.

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

**To record the cost of working on an investigation**

1. With the relevant Problem Investigation form open, click the **Financials** tab.

2. In the Investigation Cost area, click **Create**.
   
   The Cost Category field is set to Problem Investigation. This indicates the form from which you entered the charge. You cannot change this value.

3. On the Cost form, select the appropriate cost center code from the list.
   
   This is the code name for the business unit or organization within the company to be charged for servicing the problem investigation. When you select the cost center code, the Company and Cost Center Name fields display the values attached to the cost center code.

4. From the Cost Classification list, select either **Actual** or **Budget**.

5. In the Related Cost field, type the cost amount, and select the currency from the list.

6. If appropriate, you can also:
   
   - Select the cost type. Cost types are defined by your organization for reporting purposes.
   
   - Enter a description.
   
   - Select the unit type. The unit type indicates whether cost is measured as a flat rate, or in hours or minutes. If you select a unit type of hours or minutes, you must type the number of hours or minutes in the Related Units field.
   
   - Enter the date the charge was incurred. To set it to the current date, you can leave this field blank.

7. Click **Save**.

The totals for budgeted and actual costs appear at the bottom of the table.
8 Repeat steps List item. on page 123 through List item. on page 123 for each cost associated with the investigation.

**Recording the cost of CI unavailability**

*Note*

Recording the cost of CI unavailability is performed from the Classic view.

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

**To record the cost of CI unavailability**

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 Click the **Financials** tab.

3 In the Manually Entered CI Unavailability area, click **Create**.

4 Complete the Cost Update form.

5 Click **Save**.

**Using work information notes**

Work information notes provide a place for you to record activities performed on the current record. You can add attachments to the notes to provide additional information. This section describes how to add work information notes and how to view them after they are created.

**Adding work information notes**

Use this feature to add work information notes about activities performed on the current record. For example, you might want to add a note that a particular CI was deployed, and include the date.
To add work information notes—Classic view

1. Open the problem investigation, known error, or solution.

2. Click the Work Detail tab (Work Info tab when using the Classic view).

3. Type a summary of the note in the Summary field.

4. Type the details of the note in the Details field.
   
   **Note**
   
   If you are creating a work information note in a Known Error, you must also supply the target date.

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

6. From the Locked list, select Yes or No to lock the log.
   
   **Note**
   
   If you select Yes, you cannot modify the work log after you save it.

7. From the View Access list, select Internal or Public.
   
   - **Internal**—Users within your organization can see the entry.
   - **Public**—Everyone with access to BMC Remedy Problem Management can see the entry, including users from the Requester console.

8. Click Save.
   
   **Note**
   
   To see a report of selected work information entries, select one or more entries, and click Report. In the Best Practice view, you see an overview of the Work Detail entries by clicking History.

To add work information entries—Best Practice view

Use these procedures if you are using the Best Practice view.

**Note**

If you use Best Practice view and are adding work details to a solution record, use the procedure described for Classic View.

1. Open the problem investigation or Known Error record.
2 On the Work Details tab, click the Create icon.

3 Type the information in the Notes field at the bottom of the tab.

   **Note**
   If you want to add an attachment to the work information note, perform step 4 to step 6.

4 Click the button to the right of the Attachment filed.

   The Add Attachment dialog box opens.

5 Click Browse and then navigate to the file you want to attach.

6 Select the file, click Open, and then click OK.

   The file name appears in the Attachment field.

   **Note**
   You can attach a maximum of three files to a work info record. If you want to add more files, see the following Note. To view the attachment, click the spectacles icon. To remove the attachment, click the eraser icon.

   **Note**
   By default, the Work Info Type is General Information (the Work Info Type let's you categorize the type or source of the work info entry); the Locked status is Yes (the work note cannot be edited after you save it); the View Access is Internal (your customers cannot view the entry). If you want to change these settings, click the arrow beside More Details to reveal these fields and then update them appropriately. You can also make additional attachments in this area. Clicking the arrow again hides the fields.

7 Click Add.

   The note text appears in the Work Details table.

---

**Viewing work information notes**

Use the information in this section any time that you must view a work information note that you or someone else created previously. For example, if you are performing an analysis review, you must view the notes left by the assigned specialist to determine if the work performed was adequate.
To view work information notes

1. Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2. Click the Work Detail tab (Work Info tab, when using the Classic view).

3. View the information note.

<table>
<thead>
<tr>
<th>When using the Best Practice view</th>
<th>When using the Classic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the History icon.</td>
<td>Select the note from the Work Info History table.</td>
</tr>
<tr>
<td>The system displays a pop-up window with the Notes field entries arranged with the most recent entry at the top (a date and time stamp is also visible with each entry)</td>
<td>Click View.</td>
</tr>
<tr>
<td></td>
<td>To view another work information note, click the note that you want to view in the table at the bottom of the Investigation Work Info dialog box.</td>
</tr>
</tbody>
</table>

Modifying work information entries

You can also modify a work information entry.

To modify a work information entry—Classic view

1. With the problem investigation, known error, or solution record open, click the Work Info tab.

2. Select the work information entry that you want to update.

3. Edit the fields as required.

To modify a work information entry—Best Practice view

1. Open the problem investigation or known error record.

   **Note**
   
   If you want to modify a work detail entry for a solution record, use the procedure described for Classic view.

2. On the Work Details tab, select the work information entry that you want to update.

   The Notes field updates to contain the work info text and the More Details area expands to reveal the hidden fields.

3. Make the required changes.
Note
If you need to remove an attachment, click the Eraser icon beside the associated Attachment field.

4 Click Save.

Recording effort spent on an investigation

Recording effort spent on an investigation is performed in the Classic view.

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

To record effort spent on an investigation

1 Open the relevant problem investigation as described in Viewing problem investigations on page 66.

2 In the Navigation pane, choose Advanced Functions > Track Effort.

3 Complete the Investigation Effort Log dialog box as appropriate.

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

Note
The time values in the Effort Duration Hours and Minutes fields are not filled in by the system. You must type these values manually. Also, if you are updating the Effort Duration, you must make the calculations manually and then type the new values in the Hours and Minutes fields. For example, if you previously logged 10 minutes on a problem investigation and then spent an additional 90 minutes on the investigation (for a new total of 1 hour and 40 minutes), you type 1 in the Hours field and 40 in the Minutes field.

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

5 Click Close to close the dialog box.
Creating reminders

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

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

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

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

- **Problem Investigation form** — You can view all reminders associated with that investigation. This includes reminders created by other users of BMC Remedy Problem Management.

- **Known Error form** — You can view all reminders associated with that known error. This includes reminders created by other users of BMC Remedy Problem Management.

- **Solution Database form** — You can view all reminders associated with that Solution Database entry. This includes reminders created by other users of BMC Remedy Problem Management.

**To create a reminder**

1. From the Navigation pane in either the Problem Management console or the Problem Investigation form, choose **Functions => Reminders**.

   **Note**
   If you create a reminder from the main BMC Remedy Problem Management console, the reminder is general in nature. If you open a record and create a reminder, the reminder is specific to the open record.

2. Click the **Create Reminder** tab.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

9 Click **Save**.

A confirmation message appears.

10 Click **Close** to close the Reminders dialog box.
The reminder is sent at the time you specified.

Broadcasting messages

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

Creating broadcast messages

To create a broadcast, you must have the functional role of Broadcast Submitter. See the *BMC Remedy IT Service Management Administration Guide* for details.

You can create either a general broadcast message to distribute general information, or you can create a broadcast message about a specific problem investigation.

**To create a broadcast message**

1. From the Problem Management console, open the New/Modify Broadcasts dialog box.

<table>
<thead>
<tr>
<th>To send a general broadcast</th>
<th>To send a broadcast about a specific problem investigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 At the top of the Navigation page, click either New Broadcasts or View Broadcasts.</td>
<td>1 Open the relevant problem investigation.</td>
</tr>
<tr>
<td>2 Click Create.</td>
<td>2 Do one of the following actions:</td>
</tr>
<tr>
<td></td>
<td>■ Best Practice view, in the Quick Actions area of the Navigation pane, click Broadcast Problem.</td>
</tr>
<tr>
<td></td>
<td>■ Classic view, in the Functions area of the Navigation pane, click Broadcast Problem.</td>
</tr>
</tbody>
</table>

2. Enter information in the required fields.
### Table 20: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company</strong></td>
<td>Select the company to which this broadcast pertains. Only users with access to this company can see the broadcast. If you select Global from the Company list, the broadcast is sent to everyone. Note: Of the various Location fields, only Company is mandatory. The other Location fields: Region, Site Group, Site, Organization, and Department, are informational fields that allow you to specify the physical location, and so on, to which the broadcast applies. These fields otherwise do not restrict who can see the broadcast. All people assigned to the specified company can see the broadcast.</td>
</tr>
<tr>
<td><strong>Subject</strong></td>
<td>A short description of what the broadcast is about.</td>
</tr>
<tr>
<td><strong>Broadcast Message</strong></td>
<td>The text of your message.</td>
</tr>
<tr>
<td><strong>Broadcast Type</strong></td>
<td>Select a broadcast type from the list.</td>
</tr>
<tr>
<td><strong>Broadcast Start Date</strong></td>
<td>To start the broadcast now, click inside the Broadcast Start Date field, and press <strong>ENTER</strong>. To select a date from the calendar, click the <strong>Browse</strong> button next to the field, then use the calendar that appears to select the date on which the broadcast is to start and the date on which you want it to end. You can also specify times of the day using the Time feature at the bottom of the calendar.</td>
</tr>
<tr>
<td><strong>Broadcast End Date</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Broadcast Originated From</strong></td>
<td>This field is completed by the system. The contents depend on where you are creating the broadcast. If you broadcast from an problem investigation, this is set to Problem Investigation.</td>
</tr>
<tr>
<td><strong>Broadcast Originated From ID</strong></td>
<td>This field is filled in by the system, but only when you create a broadcast from within a record. If you create a broadcast from the main console, the field appears dimmed.</td>
</tr>
<tr>
<td><strong>View Access</strong></td>
<td>Select <strong>Internal</strong> if you want the broadcast enabled only for members of your organization. If you also want the broadcast enabled from the Requester console, select <strong>Public</strong>.</td>
</tr>
<tr>
<td><strong>Notify</strong></td>
<td>To automatically send a broadcast notification to an individual or group, select <strong>Yes</strong>. If you select Yes, the Manual Email button and the Notify Support area appear. Use the Manual Email button to manually send an email about the broadcast to a person or group. When the Email System form appears, enter the recipient’s email address in the Internet email field, and then click <strong>Send Email Now</strong>. Use the Notify Support area to indicate the group you want to notify of the broadcast. You must complete all of the fields: Support Company, Support Organization, and Support Group. The notification is sent at the time and on the date specified in the Broadcast Start Date field.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Select a priority level for the broadcast. The choices are Low, Medium, and High.</td>
</tr>
</tbody>
</table>
3 To add an attachment to the Broadcast, right-click inside the table and select Add from the menu.

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

4 To allow members of another group to modify the message, follow these steps:

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

The Authoring Group dialog box appears.

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

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

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

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

Viewing broadcasts

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

To view broadcasts

1 At the top of the Navigation pane, click either New Broadcasts or View Broadcasts.

2 From the Broadcast table, select the broadcast that you want to view and click View.

Note
When viewing broadcast messages from the current record, you are looking at all the broadcast messages, not just the ones related to the current record. If the broadcast table contains a large number of messages, use the Broadcast Search Criteria tab to limit the number of messages. For information about how to do this, see Limiting the number of messages on page 134.
3 To view another message, click Close to close the broadcast.

4 From the Broadcast table, select the next broadcast and click View.

Modifying a broadcast message

You can edit the fields in a broadcast message.

To modify a broadcast message

1 Open the View Broadcast window, as described in Viewing broadcasts on page 133, click Modify.

2 Edit the fields according to the changes you want to make.

3 Click Close, to save the change and close the View Broadcast window.

Limiting the number of messages

Note
Limiting the number of messages is available when using the Classic view.

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

To limit the number of messages

1 With a problem investigation record open, go to the Navigation pane and select Quick Actions => View Broadcasts.

2 Click the Broadcast Search Criteria tab.

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

3 Complete the fields in the tab.

4 Click Search.
The broadcast messages that meet the criteria appear in the table at the top of the View Broadcasts window.

## Sending pages and email messages

BMC Remedy Problem Management provides the following methods of sending messages to either individuals or organizations:

- Pages (when using the Classic view)
- Email

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

### Note

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

## Paging a person or on-call group

### Note

You can access the Paging System feature from the Classic view.

You can use the BMC Remedy Problem Management Paging System feature to individuals or the on-call member of a group about the current record.

### To page a person or an on-call group

1. With the problem investigation from which you want to send the page open, go to the Navigation pane and select **Functions => Paging System**.

2. In the Paging System dialog box, select either:
   - **Page By Person** — To page an individual.
   - **Page By On-Call Group** — To page the on-call member of a specified group.

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

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

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

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

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

- **Pager Type**—The system fills in this field automatically, using information about the recipient already in the system.

- **Pager Number**—The system automatically completes this field with the pager’s telephone number, when possible. If the pager number is unavailable to the system, you must enter the pager number manually. For information about entering the pager number manually, see Manual Pager Number, which is described in this list.

- **Pager Email**—If the pager has an email address, type it here. If you are sending the page to a person, this information is available on the Notifications tab, as described previously.

- **Manual Pager Number**—If the pager’s telephone number is not available automatically from the paging system, type the pager’s telephone number here.

- **Alphanumeric Pager Message** or **Numeric Pager Message**—Type your message in this field. Be aware that only one of these fields is enabled, depending on the type of pager the recipient carries.

### Sending email

You can send messages about the current record using the Email System.
You can use this function to send email to any valid email address. This might include an SMS recipient or wireless PDA user, if you can send email to the device.

**To send an email message**

1. With the problem investigation from which you want to send the email open, go to the Navigation pane and select **Functions => Email System**.

2. In the Email System dialog box, indicate the recipient by selecting one of the following options:

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

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

3. To select another recipient, follow these steps:
   
   a. Complete the fields in the People Search Criteria area.
   
   b. Click **Search**.
   
   c. When the search finishes, select the recipient’s name in the search results table.

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

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

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

   When you select the email recipient, as described in steps **List item. on page 137** and **List item. on page 137**, the internet email address updates from the people record.

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

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

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

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

5 Click Send Email Now.

6 Click Close to close the Email System window.

Working with reports

BMC Remedy ITSM provides a variety of predefined reports to give you quick and easy access to information about your system. Use the Report console to generate these reports. If the predefined reports return more information than you need, you can manage the scope of the report using qualifications.

This release of BMC Remedy ITSM integrates the Crystal reports from version 7.6.00 and Web reports from version 7.6.01. On the web interface, a number of reports are available in the Web format. Additional Crystal reports are available only if users have a valid Crystal license and have chosen to install them for the web at the time of installation.

Note
If you modify the prepared reports supplied Customer Support can only provide limited assistance if you should have a reporting problem. In addition, there is no guarantee that BMC Customer Support can solve problems that result from these modifications. The standard reports included with the BMC Remedy ITSM application are designed to be used without modification.
WARNING

If your database does not support the Not Equal To argument in this format: "!=",
format the content of your reports can be affected. Reports that have additional
qualifications that filter out Group By fields (for example, ‘Department’ !=
"Engineering") also filter out the specified conditions and records that have Group
By fields set to Unspecified or Null. Check with your system administrator to
determine whether your database supports this form of the Not Equal To argument.

Generating a report

Use this procedure to generate a standard report without qualifications by using the
BMC Remedy web console.

For information about generating reports with qualifications, see Using
qualifications to generate a report on page 140 or Using qualifications to generate a
report on page 140.

To generate a report by using the Remedy web console

1 In the navigation pane on the application console, choose Functions => Reports.

2 On the Reporting console, select one of the options under Show:
   
   All Reports Displays all available reports
   
   Created by me Displays reports that you created

3 Under Category, select applicationName => reportCategory => reportName.
   
   A list of available reports is displayed. Reports are organized by category, some
   of which contain subcategories. The reports that you see vary according to which
   applications are installed.

4 Select the report that you want to run.

5 Click Run.
   
   If you select a report that requires additional parameters, you are prompted to
   enter the required parameters. For example, if the selected report requires a date
   range, the date range field appears.

6 Enter the required parameters, and click OK.
If the report displayed is a web report, you can specify the following additional options:

- **Display the table of contents for the current report**
- **Export the report to a file of the specified format**

To export the report, select one of the following formats from the Export Format list:

- Excel
- PostScript
- PDF
- Word
- PowerPoint

Select the appropriate page options, and click **OK**.

- **Print the report to HTML or PDF format**

### Using qualifications to generate a report

You can manage the scope of a report by adding qualifications to the criteria that the report engine uses to generate the report content. You can tell the report to search only certain specified fields for particular values, or you can build advanced qualifications by using field names, keywords, and operators.

This procedure describes how to generate basic qualifications by using the **Show Additional Filter** option. To generate a report by using advanced qualifications, see **Using advanced qualifications to generate a report on page 142**.

### To use qualifications to generate a report

1. From the navigation pane in the application console, choose **Functions => Reports**.

2. On the Reporting console, select one of the options under **Show**.
All Reports  Displays all available reports
Created by me  Displays reports that you created

3 Under Category, select applicationName => reportCategory => reportName.

A list of available reports is displayed. Reports are organized by category, some
of which contain subcategories. The reports that you see vary according to which
applications are installed.

4 Select the Show Additional Filter option.

Along with a list of available fields, two sections are displayed—the simple query
builder and the advanced query builder. You use the simple query builder to
quickly construct a simple query. Alternatively, advanced users can use the
advanced query builder to build the query by using BMC Remedy AR System
query syntax.

For additional information about the BMC Remedy AR System Reporting console,
see the BMC Remedy Mid Tier Guide.

5 Select a field name from the Available Fields list, and click Add next to the
simple query builder.

   Note

Click to remove a qualification.

6 Click the down arrow next to the field name listed in the qualification box, and
select the appropriate operator.

7 Enter or select a value for the field in the right column.

   Example

If you want to enter the qualification Cost Center = 001, select the Cost Center
field, click the down arrow next to the field and select =, and then enter 001 in the
right column.

8 Repeat steps 5 through 7 for each field that you want to include in the report.

9 When you finish defining your additional qualifications, click Run.

10 If the report displayed is a web report, you can specify the following additional
options:
Using advanced qualifications to generate a report

You can manage the scope of a report by adding qualifications to the criteria that the report engine uses to generate the report content. You can tell the report to search only specified fields for particular values, or you can build advanced qualifications by using field names, keywords, and operators.

To generate a report by using advanced qualifications

1. From the Navigation pane in the application console, choose Functions => Reports.

2. On the Reporting Console, select one of the options under Show:
   - All Reports: Displays all available reports
   - Created by me: Displays reports that you created

3. Under Category, select applicationName => reportCategory => reportName.
A list of available reports is displayed. Reports are organized by category, some of which contain subcategories. The reports that you see vary according to which applications are installed.

4 Select the Show Additional Filter option.

Along with a list of available fields, two sections are displayed—the simple query builder and the advanced query builder. You use the simple query builder to quickly construct a simple query. Alternatively, advanced users can use the advanced query builder to build the query by using BMC Remedy AR System query syntax.

For additional information about the BMC Remedy AR System Reporting console, see the BMC Remedy Mid Tier Guide.

5 Select a field name from the Available Fields list, and click Add next to the advanced query builder. Use the BMC Remedy AR System query syntax to build your qualification.

6 Construct your qualification by using the various operators provided by the qualification builder.

7 Repeat steps 5 and 6 for each field that you want to include in the report.

Note
Select the qualification and press Delete to remove a qualification.

8 When you finish defining your advanced qualification, click Run to view the updated report.

**BMC Remedy Problem Management predefined reports**

This section lists the predefined Web reports and Crystal Reports available for BMC Remedy Problem Management. It provides a brief description of each report and shows you where to find it.

You first select the type of report that you want to run. The report type pulls information from the appropriate BMC Remedy ITSM application form. After you select a report type, you select the individual report that you want to run.

Table 21 on page 144 describes the predefined Web reports and Table 22 on page 144 describes the predefined Crystal Reports included, organized by the type of report.
### Table 21: Web reports—names and descriptions

<table>
<thead>
<tr>
<th>Report name</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Problem Investigation => All** | All Problem Investigations by Coordinator Group  
Lists all problem investigations, based on the problem coordinator’s group |
| **Problem Investigation => Open by Service** | Open Problem Investigations by Service  
Lists open problem investigation records grouped by service |
| **Problem Investigation => Resolved by Product Categorization** | Resolved Problem volume by Product Categorization  
Lists resolved and closed problem investigation records grouped by product category |
| **Known Error => All by Coordinator Group** | All Known Errors by Coordinator Group  
Lists all known errors, based on the problem coordinator’s group |

### Table 22: Crystal reports—names and descriptions

<table>
<thead>
<tr>
<th>Report name</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Known Error => Resolved => Resolved Known Errors by Coordinator Group** | Resolved Known Errors by Coordinator Group  
Lists resolved known errors, which includes known errors with a status of canceled, closed, and corrected. The listing is grouped by status and problem coordinator group |
| **Known Error => Open => Open Known Errors by Coordinator Group** | Open Known Errors by Coordinator Group  
Lists open known errors records grouped by status and problem coordinator group |
| **Problem Investigation => Open** | Open Problem Investigations by Coordinator Group  
Lists open problem investigation records grouped by status and problem coordinator group |
| **Problem Investigation => Resolved** | Resolved Problem Investigations by Coordinator Group  
Lists resolved and closed problem investigation records grouped by status and problem coordinator group |
| **Problem Investigation => Root Cause** | Problem Investigations by Root Cause  
Lists problem investigations grouped by root cause  
Resolved Problem Investigations by Root Cause  
Lists all resolved problem investigations, grouped by the root cause of the problem |
Managing configuration items

A configuration item (CI) is a physical, logical, or conceptual entity that is part of your IT environment and has configurable attributes.

Some CI types are virtual, while others are physical. The Service CI type is an example of a virtual CI. In this context, a service can be provided from one business or organization within a business to another. Service CIs can include customer support, employee provisioning, web farms, storage, and so on.

Other CI types are physical and include hardware and software.

You can use the information in CIs to diagnose user problems and to determine if a change to a CI or the IT infrastructure must be made. For example, if a user calls in with a printing problem, you can check the printer’s CI to see whether the printer is down.

To record information against CIs, such as CI unavailability, or to relate an problem investigation to a CI, the CI must be recorded in the BMC Atrium Configuration Management Database (BMC Atrium CMDB). If you do not have BMC Remedy Asset Management, then BMC Remedy Problem Management provides limited ability to manage CIs and inventory.

Note

You can manage configuration items even if your environment does not run BMC Remedy Asset Management. To manage configuration items, including creating and modifying CIs and managing inventory for bulk and non bulk CI’s, you do not need a BMC Remedy Asset management license. However, if you are running BMC Remedy Asset Management, then you have access to additional functionality, as described in the BMC Remedy Asset Management User Guide. To make use of this additional functionality, you will need either Asset Admin or User permissions and an AR System fixed or floating license.
Creating a CI

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

There are many different types of CIs that you can create. While the general procedure for creating each CI type is similar, only the specific fields on the CI form change depending on the CI type.

This section provides several examples of how to create CIs.

To create a Service CI

Note
Step List item. on page 146 to List item. on page 82 creates the service CI. Step List item. on page 97 to List item. on page 67 relates the service CI to a company. This is necessary to make sure the service CI appears in the Service field menu on the Classification tab, when relating the problem investigation to a company.

1. From the Navigation pane of the console, choose Functions > Manage CIs.

2. From the CI Type list, select Logical Entity > Business Service and then click Create.

3. On the Business Service form, type the CI name in the CI Name field.

When creating a CI name, BMC recommends that you follow a consistent naming convention. According to ITIL guidelines, identifiers should be short but meaningful. For example, Payroll” or Network.” The name can be followed by a numeric code, such as NETWORK100.

4. Complete the optional fields that appear on the form in a way that is appropriate for the service you are creating.

Table 23: Optional fields when creating a Service CI

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI ID</td>
<td>A customer specified identifier. You can use this to augment the CI Name.</td>
</tr>
<tr>
<td>Company</td>
<td>The company that owns the service.</td>
</tr>
<tr>
<td>Impact, Urgency, and Priority</td>
<td>Used to determine service levels when assigning support.</td>
</tr>
<tr>
<td>Supported</td>
<td>Indicates whether the service currently is supported.</td>
</tr>
</tbody>
</table>
**Creating a CI**

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Role</td>
<td>A description of the role the service fulfills in the organization.</td>
</tr>
<tr>
<td>Additional Information</td>
<td>A place to record any additional information about the service.</td>
</tr>
<tr>
<td>Users Affected</td>
<td>The number of users who use this service.</td>
</tr>
<tr>
<td>Product Categorization</td>
<td>Use this file to categorize the business service through multiple tiers. This hierarchy is used to drive assignment routing.</td>
</tr>
<tr>
<td>Location</td>
<td>The location of the support group that supports the service.</td>
</tr>
<tr>
<td>Lifecycle</td>
<td>The date on which the service became active.</td>
</tr>
</tbody>
</table>

5 Click Save.

**Note**

Depending on how your application is configured, after you click Save to create a Service CI, the Service CI form might be redisplayed in a Modify window.

6 Open the People tab and click Add.

7 From the Type list in the CI Person Type, select People Organization and then click OK.

8 From the Company list in the Organization Search window, select the company to which you are relating the service and then click Search.

**Note**

If you are relating the service to the entire company, then skip List item. on page 67.

9 If you must relate the service either to an organization within the company or to a department within the organization, select the organization and, if necessary, the department from the Organization and Department lists.

- **Organization** — If you choose Organization, the service is related to the specified organization within the specified company.
To create a computer system CI

1. From the Navigation pane of the console, choose Functions > Manage CIs.

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

3. Click Create.

4. In the CI Name field of the Computer System form, type a name for the CI. When creating a CI name, BMC recommends that you follow a consistent naming convention. According to ITIL guidelines, identifiers should be short but meaningful, and for hardware they should not be based on supplier device names. For example, the name can include an indicator of the CI’s function (such as “Workstation” or “Monitor”) followed by a numeric code, such as MONITOR100.

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

6. Select the company to which this CI belongs.

7. From the Primary Capability and Capability lists, select the roles this CI performs in your company’s topology.

8. Select a status from the Status list. The default value is Deployed. You can select one of the following options.
Table 24: Computer system CI status options

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

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

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

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

12 Complete the other fields in this area.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag Number</td>
<td>The CI tag number. This is the number usually placed on the product by a member of your IT department to track the CI.</td>
</tr>
<tr>
<td>Serial Number</td>
<td>The CI serial number.</td>
</tr>
<tr>
<td>Part Number</td>
<td>The CI part number.</td>
</tr>
<tr>
<td>System Role</td>
<td>The role this CI plays in your company.</td>
</tr>
<tr>
<td>Status Reason</td>
<td>The reason this CI has the status it does.</td>
</tr>
</tbody>
</table>
13 Click the General tab.

14 Categorize your CI using the lists and fields in the Product Categorization area.

15 Specify the place of the CI using the lists and fields in the Location area.

16 Enter the dates of the CI in the lifecycle area.

17 Click the Specifications tab.

18 Add more information about the CI.

19 Click Save.

**To create a bulk inventory CI**

*Note*

Bulk inventory items are not tracked by an separate record for each item. Instead, bulk items are tracked by quantities of an item type. For example, cables used to connect desktop computers to the network do not require individual records but rather, one record for a bulk quantity of the specific cable type.

1 From the Navigation pane of the console, choose Functions > Manage CIs.

2 From the CI Type list of the Manage CI Information dialog box, select Bulk Inventory > Bulk Inventory, and click Create.

3 In the Bulk Inventory form, complete the following required fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI Name</td>
<td>Enter the name of the bulk inventory item, for example, Microsoft Windows XP.</td>
</tr>
<tr>
<td>Tier 1, Tier 2, and Tier 3</td>
<td>Categorize the item.</td>
</tr>
<tr>
<td>Received Quantity</td>
<td>Enter the number of items received.</td>
</tr>
</tbody>
</table>

4 Click Save.

**To create an inventory location CI**

*Note*

You can use inventory location CIs to indicate where bulk inventory and other CIs are located.

1 From the Navigation pane of the console, choose Functions > Manage CIs.
2 From the Type list of the Manage CI Information dialog box, select System > Inventory Location, and click Create.

3 In the CI Name field of the Inventory Location form, enter the location name.

4 Complete the optional fields.

5 Click Save.

Inventory management

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

Before you can track inventory, you must:

- Create bulk inventory CIs, or other CIs to be tracked as inventory. For information about how to do this, see To modify your profile on page 114 or To create a computer system CI on page 148.

- Create inventory location CIs. For information about how to do this, see To create an inventory location CI on page 150.

- For bulk inventory, specify the received quantity and the inventory locations. For information about how to do this, see To place bulk CIs in inventory on page 151.

- For non-bulk inventory CIs, set the inventory status to In Inventory, and select a location. For information about how to do this, see To place non-bulk CIs in inventory on page 152.

Placing bulk CIs in inventory

To place bulk CIs in inventory, you must specify the location or locations for them.

Tip

If you do not see a location, make sure that the CI has a CI type of inventory location, and not physical location. For information about creating inventory locations, see To create an inventory location CI on page 150.

To place bulk CIs in inventory

1 Open a bulk CI, as described in To search for CIs from the console on page 153.
2 On the Inventory Location tab, click Add.

3 In the Search Inventory Locations dialog box, specify the search criteria and click Search.

4 Select a location, and click Relate.

5 In the message about the relationship, click OK.

6 If the inventory is stored in multiple locations, for each location, repeat List item on page 74 and List item on page 74.

7 Click Close.

On the Bulk Inventory form, the Inventory Location tab lists each of the related locations.

8 Click in the Quantity Per Location field for a location, and type the quantity in that location.

9 Continue to enter the quantity for each location, until all the quantity in stock for the bulk CI is accounted for.

10 Click Save.

After items are in inventory, you can use the Manage Inventory function to:

- view
- relocate
- reserve and use CIs and bulk inventory items

### Placing non-bulk CIs in inventory

You can place non-bulk CIs that you want to manage in inventory by changing the status of the CI to In Inventory, and then designating a location for that CI.

#### To place non-bulk CIs in inventory

1 Open a CI, as described in To search for CIs from the console on page 153.

2 From the Status list, select In Inventory.

3 Click OK in the confirmation message that appears.
4 In the Search Inventory Locations dialog box, from the Location list, select a location, make sure other values are correct, and click Search.

5 Select a location and click Return.

Managing inventory

This section describes how to perform inventory management tasks that you most commonly use.

To search for CIs from the console

1 From the Functions area of the console Navigation pane, click the Manage CIs link.

2 From the CI Type list on the Manage CI Information window, select the type of CI you are looking for and click Search.

3 On the form that appears, provide as much information about the CI you are searching for as possible and click Search.

4 From the search results list at the top of the window, select the CI.

The details appear in the CI form below the search results.

To view inventory locations

1 From the Navigation pane of console, choose Functions > Manage Inventory.

2 Enter your search criteria in the Manage Inventory dialog box, and click Search.

Results matching your search criteria appear in the table.

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

4 View the CIs in the inventory listed in the Inventory Location form.

5 Click Close.

To relocate CIs

1 From the Navigation pane of the console, choose Functions > Manage Inventory.

2 Search for inventory in the current location using the Manage Inventory dialog box.
3 Select the CI or bulk inventory item you want to relocate, and click Relocate CIs.

4 For the location where you want to relocate the CI, specify search criteria, and click Search in the Search Inventory Locations dialog box.

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

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

7 Click Relocate.

**To reserve and use inventory**

1 From the Navigation pane of console, choose Functions > Manage Inventory.

2 From the CI Type menu in the Manage Inventory dialog box, select the CI or bulk inventory item you want to reserve and use.

3 Click Search.

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

5 Click Reserve/Use Inventory.

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