



**Numara® Track-It!®
Self Service User's Guide
8.5.2**

Numara® Track-It!® 8.5.2 Self Service User's Guide

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Track-It! 8.5 Self Service Guide

Welcome to Numara® Track-It!® Self Service

Numara® Track-It!® Self Service is a Web-based application that enables you to submit your own service requests and check the status of your requests. You can also search internal Track-It! solutions, find answers to popular business applications, and more.

To Access Self Service Web:

1. Go to the URL provided by your Track-It! Administrator (typically `http://servername/TIWEB8/` where "servername" is the name of the server).
2. Enter your user name and password and click the **Sign In** button.
If your Track-It! Administrator has enabled NT Authentication, Self Service will automatically open, and you won't need to log in.
3. To access FlashHelp, click the **Help** button on the menu bar.

The FlashHelp® Interface

Track-It's online help system uses FlashHelp®, a Web-based help format that uses a combination of XML, HTML, and Flash®. When you access a help topic in the Track-It! application, either from the Help menu or from Help buttons, the help topics are delivered from Track-It's Web server to your Web browser (such as Internet Explorer). Advantages of FlashHelp® include fast load time (even over low-bandwidth connections), up-to-date help documentation, docked help pane, and less screen space used with its vertical layout.

The FlashHelp® requires a Web browser with the [Adobe Flash® Player](#), such as Internet Explorer 6.0 and above.

Note: You can also print PDF versions of the entire help system for our products (by version number). See our [support Web page](#). Track-It's FlashHelp® opens in a vertical layout, with FlashHelp® icons and navigation component icons at the top, and the selected topic displayed in the pane below.

FlashHelp® Icons	Function	How to Use
Book	Table of Contents	Click the Contents icon to view the chapters and topics.
Page	Index	Click the Index icon to view an index of topics by subject. To find an index term by keyword, type the keyword in the text box.
Magnifying Glass	Search	Click the Search icon to conduct a full-text search, then type the words you are searching for in the text box. Search results will include the equivalent to a Boolean search "AND". So if you search for "technician password", the search results will display a list of help topics with the words "technician" and "password" on the same page. To search within a topic, click anywhere on the topic text, then press the CTRL + F keys. In your browser's Find dialog, enter the search term, then follow the instructions on the dialog (such as "Next").
Printer	Print	Click the Print icon to display the Print dialog for your printer.
Navigation Components		
Reverse Arrow	Previous Topic	Click the Previous Topic icon to go to the previous topic in the Table of Contents.
Forward Arrow	Next Topic	Click the Next Topic icon to go to the next topic in the Table of Contents.
Book	Synchronize table of contents	Click the Contents icon to view where a selected topic is located within the Table of Contents.
X	Hide navigation components	Click the Hide button to hide Navigation Components. To view the Navigation Components, click the Contents, Index, or Print icons.
Copyright and Contact Information for Numara Software		
"i"	About FlashHelp®	Click the FlashHelp® icon to see copyright information.

FlashHelp® is a registered trademark of Adobe Systems Incorporated in the United States and/or other countries.

Submitting a New Request for Service

With Track-It! Self Service, you can submit requests for services from your organization's help desk such as problems, installations, and requests for training. You can also view any of your outstanding requests. If you have Numara® Track-It!® Self Service Plus, you can search for solutions before adding a work order.

To Submit a Request:

1. Go to the URL provided by your Track-It! Administrator (typically `http://servername/TIWEB8/` where "servername" is the name of the server).
2. Enter your user name and password and click the **Sign In** button.

If your Track-It! Administrator has enabled NT Authentication, Self Service will automatically open, and you won't need to log in.

3. Click **Work Orders** in the menu bar.
4. Click **Add a New Work Order** to open a new work order.
5. Enter a short summary of the problem in the **Summary** field.

You can add more details (if necessary) in the **Description** box at the bottom of the form.

6. Enter a phone number that the technician can reach you at during business hours.
7. Select the **Priority, Work Order Type, Sub-Type, and Category** from the options in the drop-down lists based on the type of action required.
8. Describe the problem or request in the **Description** field.
9. If you want to include a screen capture, document, or anything else that may help explain your issue, click the **Browse** button to locate the file that you want to attach.
10. Click the **Submit** button to create a new work order in the system.

A Request Confirmation displays to confirm receipt of the work order and provide the work order number.

Viewing Previous Requests

To View a Previously Submitted Work Order:

1. Go to the URL provided by your Track-It! Administrator (typically `http://servername/TIWEB8/` where "servername" is the name of the server).
2. Enter your user name and password and click the **Sign In** button.

If your Track-It! Administrator has enabled NT Authentication, Self Service will automatically open, and you won't need to log in.
3. Click **Work Orders** in the menu bar.
4. Click the **Open Work Orders**, **Closed**, or **All** tab to view your work orders in one of these groups.
5. Click a Work Order Number to view the details of the request. Notice that you can add to the description of the work order, print the work order, add an attachment to the work order.
6. Click **Back to Your Work Orders** to close the detail view of a previous request and return to the list view.

The table below provides a description of each of the fields contained in a work order.

Work Order Fields	Description
Field Name	
Summary	A brief statement of the problem, issue, or request.
Type	General identifier for the request (e.g., hardware, software, configuration, training, etc.)
Subtype	More detailed identifier for the request (e.g., failure, upgrade, etc.)
Category	Greatest level of detail for the request (e.g., PC, Macintosh, hard drive, memory, monitor, etc.)
Requestor	Name of the user submitting the work order.
Date Entered	That date that the request is received is recorded here.
Priority	Set a priority code based on your company's business rules and Service Level Agreements (SLA) commitments.
Date Due	Enter or edit the date that the request should be completed.
Technician Assigned	The name of the technician assigned to resolve the work order.
Date Assigned	The date and time that the request was assigned to a technician or specialist for resolution.
Completed Date	The date and time that a resolution was reached.
Description	Text entered by requestor to describe the problem or request in more detail.
Resolution	A short description of what was done to resolve the issue. This field may include the requested completion date.
Status	The current condition of your work order (e.g., unassigned, assigned, completed, etc.)
Asset ID	A unique identifier for your specific asset.

Service Level Agreements (SLAs) are a **Track-It! Enterprise** only feature.

Closing Your Own Self Service Work Orders

Closing your own work orders is useful if you've found your own solution or want to cancel your work order.

To Close Your Own Self Service Work Orders:

1. Go to the URL provided by your Track-It! Administrator (typically `http://servername/TIWEB8/` where "servername" is the name of the server).
2. Enter your user name and password and click the **Sign In** button.

If your Track-It! Administrator has enabled NT Authentication, Self Service will automatically open, and you won't need to log in.

3. To find the work order you want to complete, click the **Work Orders** tab.
4. Click the **Work Order** number.

The Work Order details display.

5. Click the **Close** link.
6. Enter a short description in the text box describing how you resolved the problem.
7. Click the **Close** button.

A confirmation messages displays that your work order was closed.

8. Click the **OK** button.

The work order will be removed from your **Open Work Orders** list. You can click the **Closed** or **All** links to view the closed work order.

Installing Mac Audit Files on Macintosh Computers

In order for your Track-It! technician to audit your Macintosh computer, you will need to install the Mac Audit files they send you via e-mail or from a shared network folder.

To Install Track-It! Mac Audit Files on Your Macintosh Computer:

1. Save the **OSXAuditInstaller.pkg.tgz** file that you receive from your Track-It! administrator to your desktop.
2. Double click the installation package (**OSXAuditInstaller.pkg**) to extract the installer to your desktop.
3. Double click the installer package (.pkg) to launch the installation.

The **Install Mac Audit** dialog displays.

4. Click the **Continue** button.
5. Select a location in your file directory to save your file.
6. Click the **Restart** button when prompted.

Your computer will be rebooted and the installation will be complete.

Mac Audit can be installed as an Add-on for Track-It! **Professional** or **Enterprise**.

Running a Workstation Audit

You can audit your computer from Track-It! Self Service. Auditing your computer provides your Track-It! Technician with information about your hardware and software. You can audit your computer even if you are running remotely from a different machine.

To Audit Your Workstation:

1. Go to the URL provided by your Track-It! Administrator (typically `http://servername/TIWEB8/` where "servername" is the name of the server).
2. Enter your user name and password and click the **Sign In** button.

If your Track-It! Administrator has enabled NT Authentication, Self Service will automatically open, and you won't need to log in.

3. Click **Run Audit** icon to start the Audit wizard.
4. Click the **Next** button on the Track-It! Audit dialog.
5. Enter the information requested on the **Enter Workstation Information** screen, then click the **Next** button.

If your Track-It! Administrator requires you to enter information about your computer, the fields will be indicated by an asterisk (*).

- Full Name
- Employee ID
- Title
- Phone
- E-mail
- Phone
- E-mail
- Alternate
- Department
- Department #
- Location
- Custom fields #1 and #2

6. Enter the following information as requested on the **Enter Workstation Information (Continued)** screen, then click the **Next** button.
 - Network
 - ID #s 1-6
 - Notes

The **Audit in Progress** screen displays with the status of the audit.

7. Click the **Next** button after reviewing the hardware audit results for your computer.
8. Click the **Next** button the software audit results.
9. Click the **Finish** button to return to Self Service.

Searching the Solutions Database

Numara® Track-It!® Self Service enables you to search the Solutions database for work order resolutions.

To Search for Solutions:

1. Go to the URL provided by your Track-It! Administrator (typically `http://servername/TIWEB8/` where "servername" is the name of the server).
2. Enter your user name and password and click the **Sign In** button.

If your Track-It! Administrator has enabled NT Authentication, Self Service will automatically open, and you won't need to log in.

3. Click **Solutions** in the menu bar.
4. If they aren't automatically checked, click the **Summary** and **Details** check boxes.
5. Enter a word or phrase in the "Search For" field.
6. Click the **Search** icon.
7. Click the results for details.
8. Click **Cancel** to return to the main view.

Changing Your Password

If your Track-It! Administrator has given you permissions or requested you to change your password, a Change Password link will be available on the User Account page.

To Change Your Password:

1. Go to the URL provided by your Track-It! Administrator (typically `http://servername/TIWEB8/` where "servername" is the name of the server).
2. Enter your user name and password and click the **Sign In** button.

If your Track-It! Administrator has enabled NT Authentication, Self Service will automatically open, and you won't need to log in.

3. Click **User Account** in the menu bar.
4. Click **Change Password** and enter your old password.
5. Enter your new password, and enter it again for confirmation, then click the **OK** button.

You can now access Self Service using your new password.

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