

BMC Remedy IT Service Management 7.5.00
Configuration Guide



January 2009

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- Operating system and environment information
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 - Operating system type, version, and service pack
 - System hardware configuration
 - Serial numbers
 - Related software (database, application, and communication) including type, version, and service pack or maintenance level
- Sequence of events leading to the problem
- Commands and options that you used
- Messages received (and the time and date that you received them)
 - Product error messages
 - Messages from the operating system, such as `file system full`
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- Submit a new issue at http://www.bmc.com/support_home.

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Preface

The *BMC Remedy IT Service Management Configuration Guide* describes how to configure the following applications in the BMC Remedy IT Service Management Suite (BMC Remedy ITSM Suite):

- The BMC Remedy Asset Management application
- The BMC Remedy Change Management application (which includes the Release Management module)
- The BMC Remedy Service Desk solution (which includes the BMC Remedy Incident Management application and the BMC Remedy Problem Management application)



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

NOTE

This guide does not contain information about configuring the BMC Service Level Management application or the BMC Task Management module of the BMC Remedy Change Management application. For information about configuring these applications, see the *BMC Service Level Management Configuration Guide* and the *BMC Remedy Task Management Administrator's Guide*.

Best Practice and New icons

Documentation for the BMC Remedy ITSM Suite contains the following icons.

Icon	Description
	<p>The New icon identifies features or products that are new or enhanced with version 7.5.00.</p>
	<p>The Best Practice icon highlights processes or approaches that BMC has identified as the most effective way to use certain features.</p>

Audience

This guide is intended for administrators who configure BMC Remedy ITSM applications. Many administrator tasks overlap, and one individual might perform many or all of the tasks.

BMC Remedy ITSM Suite documents

The following table lists the documents available for BMC Remedy AR System 7.5.00 and the BMC Remedy ITSM 7.5.00 Suite.

Unless otherwise noted, online documentation is available with the product and on the Support website at http://www.bmc.com/support_home

NOTE

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

You can access online help by clicking on Help links within the applications.

Title	Document provides
BMC Remedy ITSM 7.5.00 Suite	
<i>BMC Remedy IT Service Management Installation Guide</i>	Procedures for installing the BMC Remedy ITSM applications and the BMC Remedy Data Management tool.
<i>BMC Remedy IT Service Management Release Notes</i>	Information about new features and known issues in BMC Remedy ITSM Suite.
<i>BMC Remedy IT Service Management Configuration Guide</i>	Procedures for configuring the BMC Remedy ITSM applications.
<i>BMC Remedy Asset Management User's Guide</i>	Procedures for using the BMC Remedy Asset Management application.
<i>BMC Remedy Change Management User's Guide</i>	Procedures for using the BMC Remedy Change Management application.
<i>BMC Remedy Service Desk: Incident Management User's Guide</i>	Procedures for using the BMC Remedy Incident Management application.
<i>BMC Remedy Service Desk: Problem Management User's Guide</i>	Procedures for using the BMC Remedy Problem Management application.
<i>BMC Remedy ITSM Guide to Multi-tenancy</i>	Procedures for using multi-tenancy in the BMC Remedy ITSM Suite.
Products related to BMC Remedy IT Service Management 7.5.00 Suite	
<i>BMC Remedy Action Request System BMC Remedy Approval Server Guide</i>	Instructions for using BMC Remedy Approval Server to automate approval and signature processes in your organization.
<i>BMC Remedy Task Management System Administrator's Guide</i>	Procedures for configuring the BMC Remedy Task Management application. Also includes steps to configure seamless authentication between the BMC Remedy Change Management application and its other components and BMC Configuration Automation for Servers, Clients, and Networks.
<i>Configuring the ITSM 7.x Suite for Distributed Server Option Environments White Paper</i>	Describes how to configure records to use unique prefixes in a distributed server environment.
BMC Atrium CMDB 7.5.00	
<i>BMC Atrium CMDB Administrator's Guide</i>	Information about configuring the BMC Atrium CMDB application to manage data about your IT environment.
<i>BMC Atrium Core Release Notes</i>	Information about new features, open issues, and resolved issues.
<i>BMC Atrium Core Installation Guide</i>	Information about installing and configuring BMC Atrium Core features, including BMC Atrium CMDB, BMC Atrium Integration Engine, Product Catalog, and BMC Atrium Impact Simulator.

Title	Document provides
<i>BMC Atrium CMDB User's Guide</i>	Information about using BMC Atrium CMDB, including searching for and comparing CIs and relationships, relating CIs, viewing history, and launching federated data.
<i>BMC Atrium Core Troubleshooting Guide</i>	Information about resolving issues with BMC Atrium CMDB components, including API, filter, and console error messages and their solutions.
<i>BMC Atrium CMDB CDM Common Data Model Diagram</i>	Hierarchical diagram of all classes in the Common Data Model (CDM), including unique attributes and applicable relationships.
<i>BMC Atrium Core Concepts & Planning Guide</i>	Information about BMC Atrium CMDB concepts and best practices for planning your BMC Atrium CMDB implementation.
<i>BMC Atrium CMDB Developer's Reference Guide</i>	Information about creating API programs using C and web services API functions and data structures.
<i>BMC Atrium CMDB Normalization and Reconciliation Guide</i>	Information about normalizing data in BMC Atrium CMDB and reconciling CIs from different data providers into a single production dataset.
<i>BMC Atrium CMDB Data Modeling Guide</i>	Best practices for using the classes that BMC provides for BMC Atrium CMDB (both the CDM and extensions) to model complex business entities, focusing on the use of multiple related CIs to model an entity rather than on general information about a class or attribute.
BMC Remedy Action Request System 7.5.00	
<i>BMC Remedy Action Request System Concepts Guide</i>	Overview of AR System architecture and features; includes information about add-on products that extend AR System functionality and a comprehensive glossary for the entire AR System documentation set.
<i>BMC Remedy Action Request System Installation Guide</i>	Instructions for installing BMC Remedy AR System.
<i>BMC Remedy Action Request System Configuration Guide</i>	Information about configuring AR System servers and clients, localizing, importing and exporting data, and archiving data.
<i>BMC Remedy Action Request System BMC Remedy Distributed Server Option Guide</i>	Information about implementing a distributed AR System server environment with BMC Remedy Distributed Server Option (DSO).
BMC Service Level Management 7.5.00	
<i>BMC Service Level Management Release Notes</i>	Information about known issues in each release of BMC Service Level Management. Also provides a list of new features included with the application.
<i>BMC Service Level Management Installation Guide</i>	Procedures for installing the BMC Service Level Management application.
<i>BMC Service Level Management User's Guide</i>	Procedures for using the BMC Service Level Management application. It includes new features and an overview.

Title	Document provides
<i>BMC Service Level Management Configuration Guide</i>	Procedures for configuring the BMC Service Level Management application.
Online help for BMC Remedy IT Service Management 7.5.00 and related products	
BMC Atrium CMDB Common Data Model Help	Description and details of superclasses, subclasses, attributes, and relationships for each class.
BMC Atrium CMDB Javadoc™ API Help	Information about Java™ classes, methods, and variables that integrate with BMC Atrium CMDB.
BMC Remedy Asset Management Help	Help for the BMC Remedy Asset Management application.
BMC Atrium CMDB Help	Help for using and configuring BMC Atrium CMDB.
BMC Remedy Change Management Help	Help for the BMC Remedy Change Management application.
BMC Remedy Service Desk: Incident Management Help	Help for the BMC Remedy Incident Management application.
BMC Remedy Service Desk: Problem Management Help	Help for the BMC Remedy Problem Management application.
BMC Service Level Management Configuration Help	Help for configuring BMC Remedy Service Level Management.
BMC Service Level Management User Help	Help for BMC Remedy Service Level Management.

Getting Started

The following chapters are provided:

- Chapter 1, “Introducing BMC Remedy ITSM”
- Chapter 2, “Getting started”

Introducing BMC Remedy ITSM

This section provides an overview of the BMC Remedy IT Service Management Suite (BMC Remedy ITSM Suite).

The following topics are provided:

- BMC Remedy ITSM Suite applications (page 22)
- BMC Remedy ITSM Suite architecture (page 22)

BMC Remedy ITSM Suite applications

The BMC Remedy ITSM Suite helps you manage your IT organization's assets and activities.

The BMC Remedy ITSM Suite consists of four applications:

- **BMC Remedy Service Desk**, 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 includes the Task Management module and Release Management module.

For more information about these applications, see "BMC Remedy ITSM Suite documents" on page 14.

NOTE

For information about configuring the Task Management module of BMC Remedy Change Management application, see the *BMC Task Management Administrator's Guide*.

BMC Remedy ITSM Suite architecture

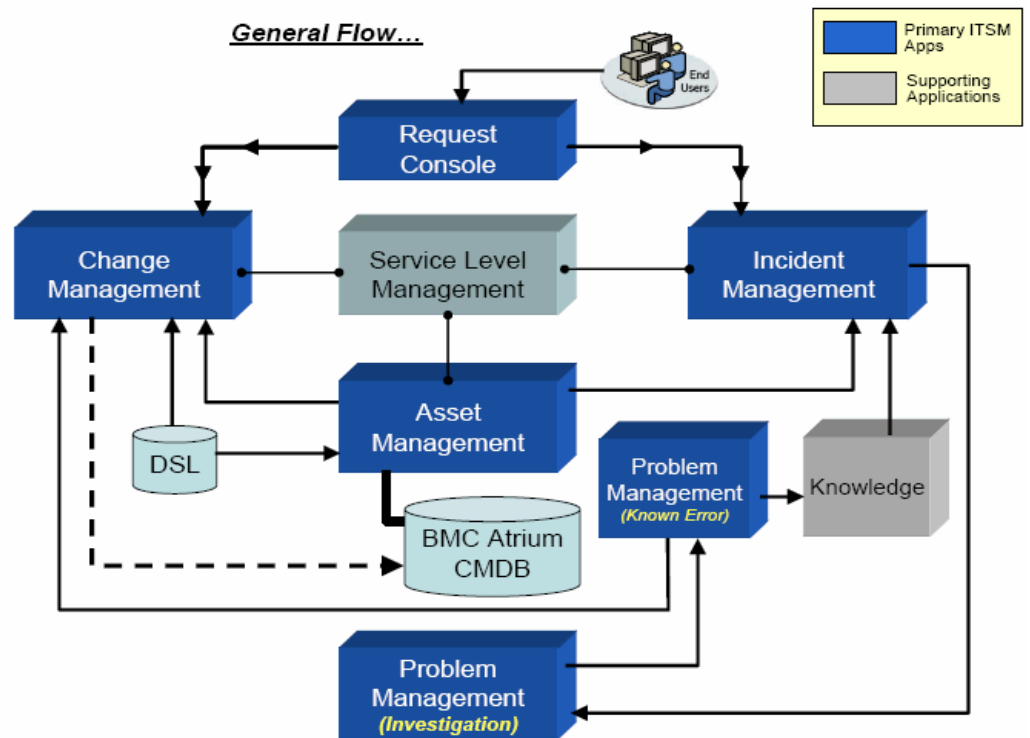
The BMC Remedy ITSM suite is designed with an overall architecture in mind. Each application in the suite must work as a stand-alone application, and also must integrate seamlessly and provide additional value when other products in the suite are installed. Each application has a defined process flow:

- **BMC Remedy Service Desk process:** The BMC Remedy Service Desk process includes the process flows required to resolve outages and keep the customer working at the appropriate level, as defined by the company's Service Level Agreements (SLAs). Two processes support the BMC Remedy Service Desk: BMC Remedy Incident Management application and BMC Remedy Problem Management application. BMC Remedy Knowledge Management (which must be ordered separately) supports BMC Remedy Incident Management and BMC Remedy Problem Management by facilitating the organization and cataloguing of solutions to past incidents and problems.
- **BMC Remedy Change Management process:** This process manages changes in the infrastructure. They can be large scale changes such as upgrading a set of vital systems, or smaller changes such as setting up new employees. The change management process is designed to be open to handle the many different types of processes that an organization might have.

- BMC Remedy Asset Management process:** The combination of the BMC Atrium CMDB and the BMC Remedy Asset Management application provides the model for doing asset and configuration management within the BMC Remedy ITSM Suite. BMC Remedy Asset Management processes provide mechanisms to manage schedules, contracts, procurement, depreciation, and charge-backs.

Figure 1-1 describes the BMC Remedy ITSM Suite applications and the general process flow.

Figure 1-1: BMC Remedy ITSM Suite process flow



For detailed information about the BMC Remedy ITSM Suite architecture, see the *BMC Remedy IT Service Management Suite Architecture* white paper.

2 Getting started

This section describes what you need to do before you can configure BMC Remedy ITSM Suite.

The following topics are provided:

- Configuration overview (page 26)
- BMC Remedy ITSM Suite configuration prerequisites (page 26)
- Defining an application administrator (page 27)
- Activating application licenses (page 29)
- Using the Application Administration Console (page 34)
- Customizing BMC Remedy ITSM Suite (page 41)

Configuration overview

This section describes the high level steps that you follow to configure your BMC Remedy ITSM Suite. Each step references the section that describes how to complete the step.

- Step 1** Make sure that you have completed the prerequisites as described in “BMC Remedy ITSM Suite configuration prerequisites.”
- Step 2** Activate your application licenses. For more information, see “Activating application licenses” on page 29.
- Step 3** Set up an application administrator ID from the default to make sure the security of your BMC Remedy ITSM Suite. For more information, see “Defining an application administrator” on page 27.
- Step 4** Familiarize yourself with how to use the Application Administration Console, which is the interface that you use to complete each area of configuration. For more information, see “Using the Application Administration Console” on page 34.
- Step 5** Configure BMC Remedy ITSM Suite. There are two types of configuration: standard and custom. Complete the configuration in the order specified. For more information, see “Customizing BMC Remedy ITSM Suite” on page 41.
- Step 6** Optionally, you can also customize BMC Remedy ITSM Suite. For more information, see “Standard configuration overview” on page 35 and “Customizing BMC Remedy ITSM Suite” on page 41.

BMC Remedy ITSM Suite configuration prerequisites

Before you can use the BMC Remedy ITSM Suite applications to manage your IT organization, you must add information about the various people, groups, skills, responsibilities, and geographic locations associated with your organization to the applications.

To add information to the BMC Remedy ITSM Suite applications, you must have the following prerequisites:

- Basic knowledge of BMC Remedy Action Request System (BMC Remedy AR System) administration tasks.

- You must configure the following information in the BMC Atrium CMDB before you can configure the BMC Remedy ITSM Suite. This information is required before you can add people.
 - Companies
 - Product Categorization (optional)
 - Site information

For more information about configuring Atrium, see the *BMC Atrium Core Installation Guide* and the *BMC Atrium CMDB Administrator's Guide*.

Defining an application administrator

The application administrator is the person responsible for configuring BMC Remedy ITSM applications. BMC Remedy ITSM Suite applications are installed with a default application administrator login ID, which you can use to start configuring the applications (see the *BMC Remedy ITSM Configuration Quick Start* reference card).

You can assign application administration permissions to a new or existing user account. For more information about BMC Remedy AR System users, see the *BMC Remedy Action Request System Form and Application Objects* guide.

The following procedure sets the minimum information required to enable the application administrator to configure applications. When you configure users, you should modify this application administrator login ID to make it secure. For more information about configuring users, see “People information” on page 107.

— **IMPORTANT** —

Always configure people by opening the BMC Remedy ITSM Suite People form from the Application Administration Console. Changes in that form are automatically made in the BMC Remedy AR System User form, but changes in the User form are not made in the People form.

► **To define the application administrator**

— **NOTE** —

The application administrator must have an BMC Remedy AR System license.

- 1 Open BMC Remedy User by choosing Start > Programs > BMC Software > AR System > BMC Remedy User.

— **TIP** —

Depending on the version of Windows you are running, you need to choose Start > Programs or Start > All Programs.

- 2 Log on as appadmin.
- 3 Open the Application Administration Console.

- 4 On the Standard Configuration tab, select the appropriate company.
- 5 To use a new user as the administrator, create a record for the new user. For more information about creating new users, see “Creating people records using templates” on page 108.
- 6 To use an existing user as the administrator, find the user as follows:
 - a Click the View link next to Step 4 People.
 - b In the People form, search for the user.
 - c Select the user to define as the application administrator.
Information for the selected user appears in the People form.
- 7 Click the Login/ Access Details tab.
 - a In the Unrestricted Access field, select Yes. This is the default.
 - b In the Application Permission area, click Update Permission Groups.
 - c In the Permission Group field of the Permission Group dialog box, select each appropriate permission group.
 - d If licensing applies to a permission group, select a license type.
 - For the Asset Config and Cost Manager permission groups, the license is optional.
 - For the Asset Admin and Asset User permission groups, a license is optional to create and modify configuration items but is required to access additional BMC Remedy Asset Management functionality.
 - e Click Add/Modify for each permission group.

Application	Permission group
All	AR System > Administrator
	Financial > Cost Manager
	Foundation > Config Categorization Admin
	Foundation > Config Group Mapping Admin
	Foundation > Contact Location Admin
	Foundation > Contact Organization Admin
	Foundation > Licensing
	Foundation > Notification Admin
BMC Remedy Asset Management application	Asset > Asset Config
BMC Remedy Asset Management application using BMC Remedy Approval Server	Foundation > Approval Admin

Application	Permission group
BMC Remedy Change Management application	Change > Infrastructure Change Config
	Release > Release Config
	Request > Requester Console Config
	Task > Task Application Config
	Task > Task Process Config
BMC Remedy Change Management application using BMC Remedy Approval Server	Foundation > Approval Admin
BMC Remedy Incident Management application	Incident > Incident Config
	Request > Requester Console Config
	Task > Task Application Config
	Task > Task Process Config
BMC Remedy Problem Management application	Problem > Problem Config
	Task > Task Application Config
	Task > Task Process Config

For more information, see “Permissions” on page 480.

8 Click Close.

The application administrator’s information is stored in the BMC Remedy AR System User form and the BMC Remedy ITSM People form.

Activating application licenses

To add information to the BMC Remedy ITSM Suite applications, you must have a BMC Remedy AR System write license (fixed or floating). You must also have the appropriate application licenses to create or modify entries in the Application Administration Console. A *license key* is a value that enables you to activate a license. Licensing requirements vary, depending on which version of BMC Remedy AR System you use.

- In BMC Remedy AR System 7.0.01, you must have a license key for BMC Remedy AR System Server and for each supporting application on your server. After you obtain the key, you use it to activate your product license.
- In BMC Remedy AR System 7.1.00 and later, you must have a license key for BMC Remedy AR System Server only. You can activate licenses for supporting applications without a license key.

NOTE

In all versions of BMC Remedy AR System, you must activate the licenses *before* installing the applications.

NOTE

The license type of a user cannot be changed to Fixed more than three times in one week.

The BMC:SR Mgmt Application license and BMC:Financial Management Application license are required to install the BMC Remedy IT Service Management application.

If you have questions about licensing requirements, contact Customer Support.

For information about activating licenses, see the version of *BMC Remedy Action Request System Configuration Guide* that supports the version of BMC Remedy AR System on which you are installing the applications.

Obtaining license keys for BMC Remedy ITSM Suite

You can obtain license keys for applications that you are installing from the BMC Remedy ITSM Suite from the Customer Support site at http://www.bmc.com/support_home. You must know the host ID of the system running the applications when you request a license key.

► **To determine the host ID**

- 1 Open BMC Remedy User tool for the server to which you want to add licenses.
- 2 Open the BMC Remedy AR System Administration Console.
- 3 In the navigation pane, select System > General > Add or Remove Licenses.

The Add or Remove Licenses form appears as shown in Figure 2-1.

Figure 2-1: Add or Remove Licenses Form with host ID highlighted

BMC - Remedy AR System bmcsoftware

Add or Remove Licenses Current Host ID: 0019B9B1C8CB

License Type	Number of Licenses	Expiration Date	Key
BMC:Service Level Mgmt Application	1		
BMC:Service Level Mgmt User Fixed	333		
AR Server	1		THH-900534
AR Migrator	1		
AR User Fixed	9999		
BMC:Financial Mgmt Application	1		
BMC:Asset Mgmt Application	1		
BMC:Asset Mgmt User Fixed	9999		
BMC:Incident Mgmt Application	1		
BMC:Problem Mgmt Application	1		
BMC:Change Mgmt Application	1		
BMC:Incident Mgmt User Fixed	9999		
BMC:Problem Mgmt User Fixed	9999		
BMC:Change Mgmt User Fixed	9999		
BMC Atrium Integration Engine	1		
AR Reserved1 Server	1		

License Type* Number of Licenses*

License Qualifier Key

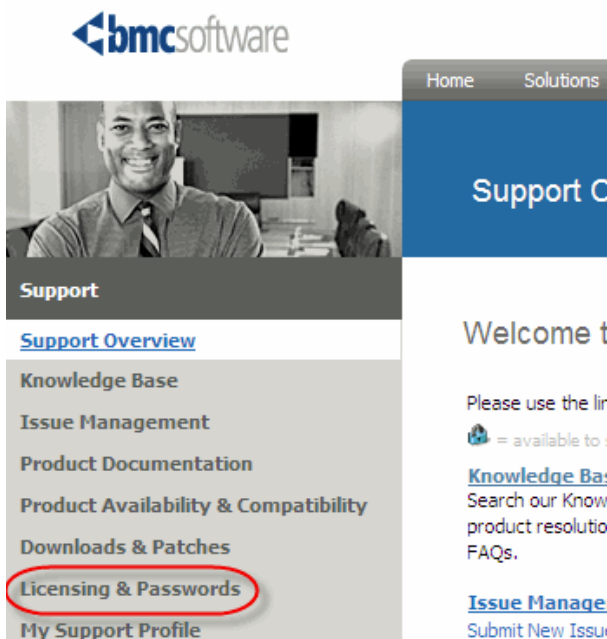
Expiration Date

- 4 Copy the host ID.
- 5 Open a browser and go to the BMC Support Site at:

http://www.bmc.com/info_center_support/overview/0,3252,19097_45424060,00.html

- 6 Log in and click Licensing and Passwords as shown in Figure 2-2.

Figure 2-2: Support Site home page



- 7 Click Request a New License.
- 8 Click I Agree.
- 9 Enter the purchase order number and quantity of each license required.
- 10 Select the BMC Remedy AR Server version.
- 11 Paste the host ID that you copied from the Add or Remove Licenses page into the Host ID field and click Request License.
- 12 Copy the License Key.
- 13 Go back to the Add or Remove Licenses window.
- 14 Click Add New.
- 15 From the License Type field, select AR Server.
- 16 Enter 1 as the number of licenses.
- 17 Enter the license key in the License Key field.
- 18 Click Save.

- 19 Now you can add licenses whenever you need them from the Add or Remove Licenses page.

TIP

You only need to add 1 per application, but add enough user licenses for the various BMC Remedy ITSM applications you are using.

- a From the list displayed, select the type of license you want to add.
The License Type field is updated with the license type you selected.
 - b Select the number of licenses and enter the license key, if applicable.
 - c Click Add New.
- 20 Click Generate License Usage Report to communicate license usage to you support and account representatives.

Adding application licenses to BMC Remedy AR System 7.0.01

To add licenses to BMC Remedy AR System Server 7.0.01 or later, you can manually apply the license keys or import the license key information. Licenses are active as soon as they are added to the server. You add or import license keys from the Add or Remove Licenses page in the BMC Remedy AR System Administration Console, which you access with BMC Remedy User or a browser.

For more information about adding licenses to BMC Remedy AR System 7.0.01, see the *BMC Remedy Action Request System Configuration Guide* guide.

NOTE

The BMC:SR Mgmt Application license is not available from the Product Feature list in the BMC Remedy AR System Administration Console. You must manually enter the BMC:SR Mgmt Application license information into the appropriate license fields and then click the Add License button.

Obtaining license keys for BMC Remedy AR System applications 7.1.00 and later

BMC Remedy AR System versions 7.1.00 and later do not require keys for application licenses; keys are required only for BMC Remedy AR System Server licenses. For more information, see the *BMC Remedy Action Request System Configuration Guide* guide.

Adding application licenses to BMC Remedy AR System 7.1.00 and later

To add licenses to BMC Remedy AR System Server 7.1.00 or later, you can enter them into a form or import them from a file. Licenses are active as soon as they are added to the server. You can add or import licenses from the BMC Remedy AR System Administration Console in BMC Remedy User. See the procedure in “Obtaining license keys for BMC Remedy ITSM Suite” on page 30 for more information.

For more information about adding licenses to BMC Remedy AR System 7.1.00 or later, see the *BMC Remedy Action Request System Configuration Guide* guide.

Using the Application Administration Console

You use the Application Administration Console to configure BMC Remedy ITSM Suite applications. The console provides access to the forms that you use to configure the applications that you installed. Only BMC Remedy AR System administrators and BMC Remedy ITSM Suite application administrators have access to these configuration forms.

— **IMPORTANT** —

Always open forms from the console. If you open forms from the object list in BMC Remedy User, you might not see all the information that you need, or you might get unexpected results.

The Application Administration Console has two tabs:

- **Standard Configuration** provides steps that walk you through the standard process for configuring your organization's information.
- **Custom Configuration** provides access to all BMC Remedy ITSM Suite configuration forms. Use this tab to extend the standard configuration.

Opening the Application Administration Console

You can open the Application Administration Console from BMC Remedy User or from a browser. If you installed the Application Administration Console shortcut on your desktop, you can also click the icon to open it. For information about installing shortcuts, see the *BMC Remedy IT Service Management Installation Guide*.

► **To open the console from a browser**

- 1 Type the following URL into your browser:

`http://webServer:port/arsys/forms/arsystemServer/Home Page`

where:

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

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

arsystemServer is the name of the BMC Remedy AR System Server that contains the application.

— **NOTE** —

If the BMC Remedy Mid Tier system and the application are on the same server, you can omit the BMC Remedy AR System Server name.

- 2 In the User Name and Password fields of the Welcome page, enter your user name and password.
- 3 Click Login.
- 4 On the IT Home page, click the Application Administration Console link.
The Application Administration Console appears.

► **To open the console from BMC Remedy User**

- 1 Choose Start > Programs > BMC Software > User Tool > BMC Remedy User.
- 2 In the Login dialog box, enter the following information:
 - a In the User Name field, enter the application administrator's user name.
 - b In the Password field, enter the application administrator's password.
 - c In the Preference Server field, specify the name of the preference server if you use BMC Remedy AR System centralized preferences.

NOTE

For information about creating an application administrator, see "Defining an application administrator" on page 27.

- 3 Click OK.
If the IT Home page does not open, perform the following steps:
 - a In BMC Remedy User, choose Tools > Options.
 - b In the Options dialog box, click the Home Page tab.
 - c Select the Open Home Page Automatically option.
- 4 On the IT Home page, click the Application Administration Console link.
The Application Administration Console appears.

Standard configuration overview

BMC recommends that you add information about your IT organization to your BMC Remedy ITSM Suite applications in a specific order. The following table lists the recommended sequence for configuring the BMC Remedy ITSM Suite applications. The order is especially crucial when you create relationships among different types of information. See Chapter 3, "Standard configuration tasks."

Working with the Standard Configuration tab

The Standard Configuration tab on the Administration Console walks you through the steps required to set up a standard configuration. Even if you plan to customize your configuration, you start by first performing a standard configuration.

NOTE

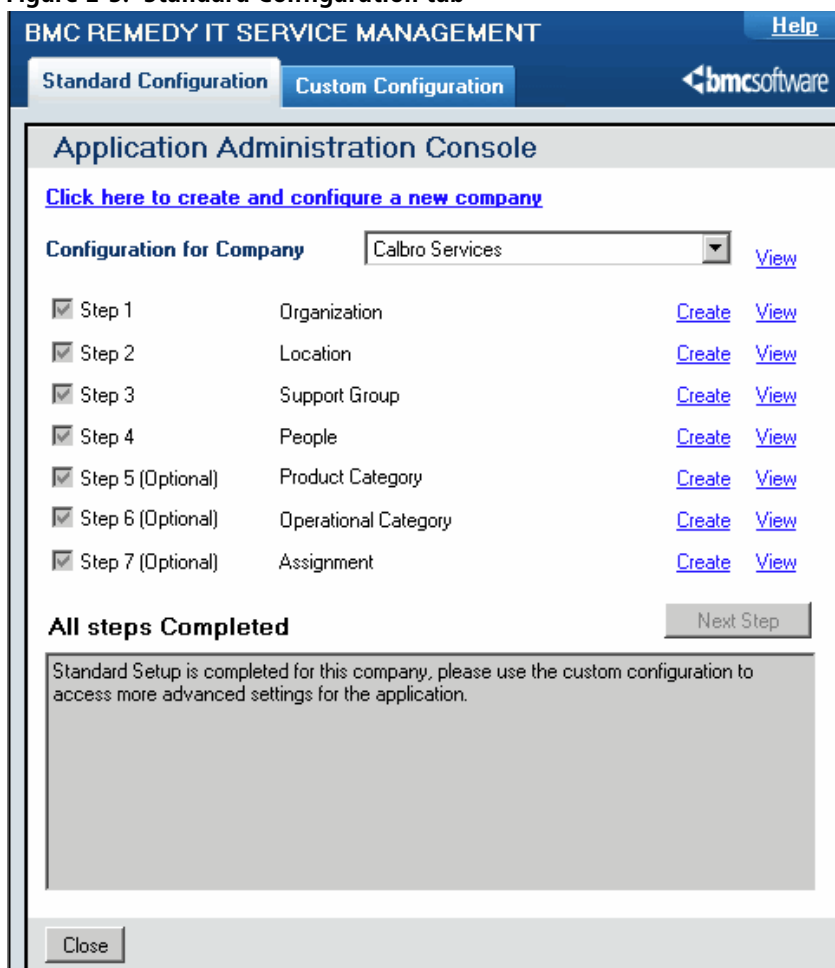
To configure companies, you need an administrative account (see “Defining an application administrator” on page 27). If your account is missing a required permission, you will be prompted to grant yourself that permission.

► **To work with the Standard Configuration tab**

- 1 Open the Application Administration Console.

On the Standard Configuration tab, the Configuration for Company field appears the company currently selected for configuration. Check marks appear next to each configuration step completed for that company. The next step to perform is described at the bottom of the tab.

Figure 2-3: Standard Configuration tab



- 2 Select a company to configure:
 - To configure a new company, click the link [Click here to create and configure a new company](#). For more information about configuring companies, see Chapter 4, “Configuring companies and organizational structures.”

- To configure an existing company, select the appropriate company in the Configuration for Company field.
- 3 To create company components, click Next Step.

The dialog box for the next configuration task appears.

NOTE

Alternatively, click Create next to the appropriate step.

Complete the steps in the order that they are listed on the tab. If you skip a step, you might be unable to complete a subsequent step.

- 4 To view and modify items, click View next to the appropriate item type. See “Viewing and modifying standard configuration data” on page 68.
- 5 If you make changes, click Save.

Custom configuration overview

After you have configured your system for standard operation, you can continue to customize your configuration. Table 2-1 describes the steps for a custom configuration. Depending on the applications that you have installed, all steps may not be applicable or required.

Table 2-1: Custom configuration steps

Step	Information to configure	See
1	Complete standard configuration	“Custom configuration overview” on page 37
2	Configure BMC Remedy Asset Management: <ul style="list-style-type: none"> ■ BMC Remedy Approval Server ■ Reconciliation Engine 	Chapter 15, “Configuring BMC Remedy Asset Management”
3	Configure BMC Remedy Change Management: <ul style="list-style-type: none"> ■ BMC Remedy Approval Server. 	Chapter 10, “Configuring BMC Remedy Change Management”
4	Configure Foundation options: <ul style="list-style-type: none"> ■ Command Automation ■ Chargeback ■ Costing ■ Data Management 	Chapter 8, “Configuring additional Foundation options” Chapter 9, “Configuring advanced options”
5	BMC Remedy Incident Management application	Chapter 13, “Configuring BMC Remedy Incident Management”
6	BMC Remedy Problem Management application	Chapter 14, “Configuring BMC Remedy Problem Management”
7	Release Management module	Chapter 11, “Configuring Release Management”
8	Configure activities and rules	Chapter 11, “Configuring Release Management”

Table 2-1: Custom configuration steps (Continued)

Step	Information to configure	See
9	Requester Console module	Chapter 16, "Configuring the Requester Console application"
10	Approvals	Chapter 12, "Configuring approvals"
11	Tasks: <ul style="list-style-type: none"> ■ Assignment configuration ■ Integration, including applications and return codes ■ Task groups and templates 	<i>BMC Remedy Task Management System Administrator's Guide</i>
12	Applications that integrate with BMC Configuration Automation for Server, Client, and Network	See the documentation for that module.

Working with the Custom Configuration tab

NOTE

Some of the custom configuration information depends on other existing information already being in place. For this reason, BMC recommends that you use the Standard Configuration tab to perform as much of the configuration as you can. For more information about using the Standard Configuration tab, see "Working with the Standard Configuration tab" on page 35 and Chapter 3, "Standard configuration tasks."

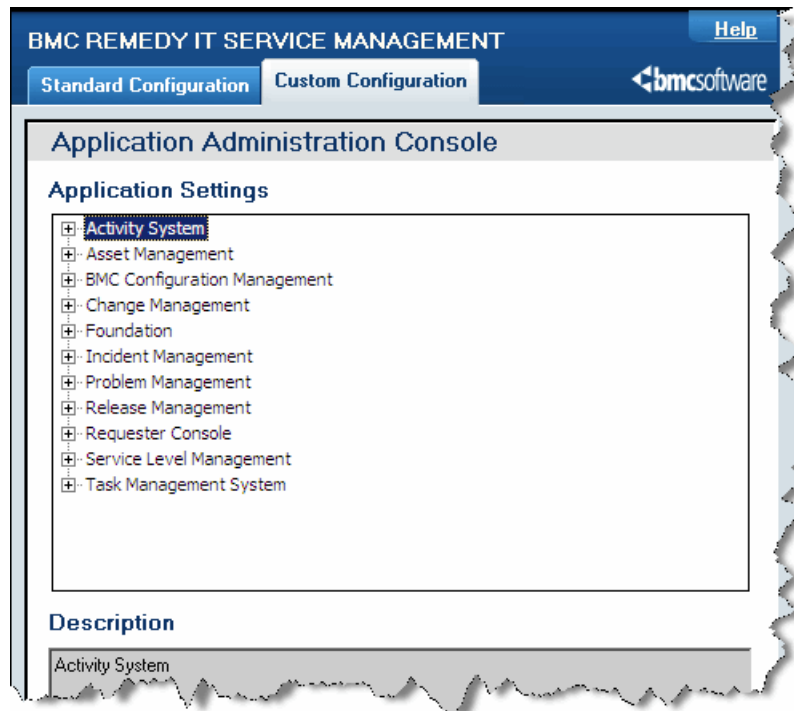
Then use the Custom Configuration tab described in this section to complete configuration tasks you cannot complete within the Standard Configuration tab, such as providing configuration information for the BMC Remedy ITSM Suite applications.

The Custom Configuration tab on the Application Administration Console provides access to all of the forms that you can use to configure BMC Remedy ITSM Suite.

► To work with the Custom Configuration tab

- 1 Open the Application Administration Console.
- 2 Click the Custom Configuration tab. Most of the configuration tasks in this book see this tab.

Figure 2-4: Application Administration Console—Custom Configuration tab



- 3 Expand an option in the Application Settings list to view the available options.
- 4 To open configuration forms, perform either of the following tasks:
 - Double-click an option in the list.
 - Select an option in the list and click Open.
- 5 To perform custom configuration, follow the tasks in the order that they are presented in Table 2-1 on page 37.

Common tasks

This section describes the tasks that are common across all the BMC Remedy ITSM Suite functionality:

- Searching for information
- Modifying information
- Deleting information

Searching for information

Use the following procedure to search for information by using the Application Administration Console. You can search for information already configured in the system by using any of the forms.

► To search for information

- 1 Open the form that contains the information that you want to find.

For example, to open the Company form:

- a On the Custom Configuration tab of the Application Administration Console, choose Foundation > Organizational Structures > Companies and Organizations.

- b Click Open.

The form appears in New mode.

- 2 Change to Search mode by performing either of the following tasks:

- In BMC Remedy User, click the New Search toolbar icon.
- In a browser, click the Search button on the form.

- 3 Enter the search criteria.

TIP

Keep your search as narrow as possible. For example, if you perform a search by city name alone, the search might take a long time and degrade performance on the BMC Remedy AR System Server.

- 4 Click Search.

The records returned by the search are displayed in the results list at the top of the form.

Modifying information

Use the following procedure to modify information by using the Application Administration Console. You can make modifications to information already configured in the system by using any of the forms.

► To modify information

- 1 Open the form that contains the information to modify.

- 2 Search for the information to modify.

See "Searching for information" on page 40.

- 3 Select the item to modify from the search results list.

The information for the selected entry appears in the form.

- 4 Make the modifications, and then click Save.

Deleting information

Use the following procedure to delete information by using the Administration Console. You can delete information already configured in the system by using any of the forms. To delete information, you must be a member of the Administrator permission group.

WARNING

The information is permanently deleted.

► To delete information

- 1 Open the form that contains the information to delete.
- 2 Search for the information to delete.
See “Searching for information” on page 40.
- 3 Select the item to delete from the search results list.
The information for the selected entry appears in the form.
- 4 If the form contains Status options, select the Delete option, and click Save.
For example, on the Company form, the Status options are in the lower, right corner of the form.
- 5 Perform either of the following tasks:
 - In BMC Remedy User, choose Actions > Delete.
 - In a browser, click the Delete button below the results list.

Customizing BMC Remedy ITSM Suite

Application administrators and workflow developers can customize the BMC Remedy ITSM Suite of applications to meet the needs of their organization. For example, they can modify the following workflow elements:

- **Field lists**—Many BMC Remedy ITSM Suite character fields provide lists from which users can select options. BMC Remedy ITSM Suite uses configurable field lists to provide the following benefits:
 - Data consistency
 - Simplified presentation of options within application forms
 - Multitiered categories for classifying assets, changes, incidents, and problems
 - Convenient access to predefined reports
- **Filters**—A filter is a mechanism that causes a set of actions to occur when specific conditions are met. Filters can also establish rules for valid data entry. For example, if certain fields must be filled in before a request can be submitted, a filter can activate a message indicating which fields need to be filled in.

- **Active links**—BMC Remedy ITSM Suite uses predefined active links to retrieve and update information.
- **Escalations**—An escalation is a mechanism for checking a set of conditions on a regular basis and performing one or more actions when those conditions are met.
- **Table fields**—Table fields enable users to view specific fields and requests from another (supporting) form or from the original form in a spreadsheet format. Each column title in the table field represents a field in the supporting form, and each row represents an entry in the supporting form. If new entries are made to the supporting form, the user sees them when the table is refreshed.

For more information about workflow elements, see the following guides:

- *BMC Remedy Action Request System Form and Application Objects*
- *BMC Remedy Action Request System Workflow Objects*

BMC Remedy Asset Management, BMC Remedy Change Management, and BMC Remedy Service Desk are shipped with predefined processes and rules that support the business model described in this guide. You can customize these applications further as follows:

- BMC Remedy Approval Server forms enable advanced users to define custom processes and rules.
- You can use BMC Remedy Asset Management as shipped, or you can customize it to meet your needs. Typical customizations include adding BMC Remedy AR System filters and active links to enhance workflow.
- If you customize BMC Remedy Asset Management, you might also need to extend BMC Atrium CMDB. For information about extending the functionality of these applications, see *BMC Atrium CMDB CDM Common Data Model Diagram* and *BMC Atrium CMDB User's Guide* and visit the Support website at http://www.bmc.com/support_home.



Standard Configuration

The following chapter is provided:

- Chapter 3, “Standard configuration tasks”

Standard configuration tasks

This section describes how to configure BMC Remedy IT Service Management Suite (BMC Remedy ITSM Suite) with the information required for a basic standard configuration. It contains the procedures required to get your system operational.

The following topics are provided:

- Configuring companies (page 46)
- Creating organizations (page 47)
- Creating locations (page 48)
- Creating support groups (page 50)
- Adding people information (page 51)
- Creating product categories (optional) (page 62)
- Creating operational categories (optional) (page 64)
- Creating assignment routing in a standard configuration (optional) (page 66)
- Viewing and modifying standard configuration data (page 68)

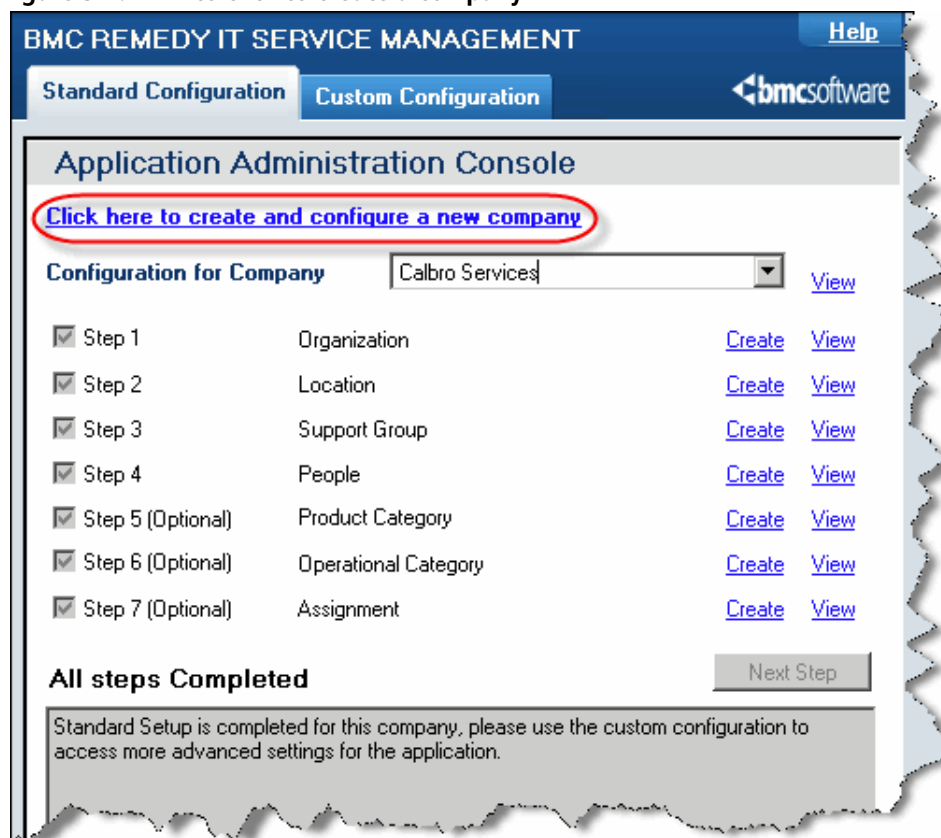
Configuring companies

The first step in standard configuration is to configure a company. Everything else that you configure belongs to this company. You can configure multiple companies if your company is made up of smaller companies that are separate entities.

► **To configure a company**

- 1 On the Standard tab of the Application Administration Console, click [Click here to create and configure a new company](#) to create and configure a new company as shown in Figure 3-1.

Figure 3-1: Link to click to create a company



- 2 In the Company dialog box, select or enter a Company name.
- 3 Select or enter a Company Type.
- 4 Click Add.

Figure 3-2 shows a company being added.

Figure 3-2: Example of a Company being configured

- 5 Repeat step 2 through step 4 until you have added all the companies you want.
- 6 When you are finished adding companies, click Close.

Creating organizations

Organization structure is defined as Company > Organization > Department, which represents how a company is represented from a business perspective.

► To create the company and organizations

- 1 From the Standard Configuration tab of the Application Administration Console, click the Create link next to Organization.
The Organization form appears with the company you are configuring displayed.
- 2 Enter or select the organization.
Enter the name of the organization to create it. After you add the first department to the organization, you can select the organization when you add another department.
- 3 Enter the department.
- 4 Click Add.

You can continue to add organizations and departments. Figure 3-3 shows an example of an organization being created.

Figure 3-3: Example of an organization being added

- 5 Repeat step 2 through step 4 to add the organizations that you require.
- 6 When you are finished configuring organizations and departments for the company, click Close.

Creating locations

The Location structure is defined as Company > Region > Site Group and Site, which represents locations of sites. The location structure can be used in group assignment and other mapping functions such as approvals. Sites represent a physical location (such as a building) for a company.

► To create locations

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.
- 2 Click the Create link next to Location.
- 3 Optionally, enter or select information in the Region and Site Group fields.

You can use the Region and Site Group fields to create a location structure with two or three levels.

- **Region**—Geographic areas can be divided into regions. A company can have several regions, depending on how many sites it has and where the sites are located. Examples of company regions are Northwest, Atlantic, and Pacific. Creating regions under a company is done only for reporting in BMC Remedy ITSM.

Enter the name of a region to create it. After you add the first site group or site to the region, you can select the region when you add another site or site group.

- **Site Group**—Geographic areas can be subdivided into *site groups*, which are collections of individual locations. A company can have any number of site groups, depending on how many locations it has and where they are. An example of a company site group is ABC Europe Region.

Enter the name of the site group to create it. After you add the first site to the site group, you can select the site group when you add another site.

- 4 Enter the site designation in the Site field.
- 5 Enter or select the site address information.
- 6 Click Add.

You can continue to add regions, site groups, and sites. Figure 3-4 shows a location being added.

Figure 3-4: Example of a Location being added

- 7 Repeat step 3 through step 6 to add the locations that you require.
- 8 When you are finished configuring the company locations, click Close.

Creating support groups

The Support Group structure is defined as Company > Support Organization > Support Group, which represents how a company is structured from a support perspective. Support groups are typically used to assign work in BMC Remedy ITSM applications.

► To create support groups

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.
- 2 Click the Create link next to Support Group.
- 3 Enter or select information in the Support Organization field.

Enter the name of the support organization to create it. After you add the first support group to the organization, you can select the organization when you add the next support group.

- 4 Enter or select information in the Support Group Name field.
- 5 Enter or select the support group role.

The Support Group Role field describes the role that the support group has in the organization. For example, the support group named Internal Support might provide the Help Desk function, while another support group provides Tier 2 support.

- 6 Click Add. Figure 3-5 shows a support group being added.

Figure 3-5: Example of a Support Group being added

- 7 Repeat step 3 through step 6 to add all the support groups that you require.
- 8 When you are finished configuring support organizations and groups for the company, click Close.

Adding people information

You can create records for both support and non-support staff. Non-support staff members include anyone who is not a member of the IT organization, or does not create or modify records in BMC Remedy ITSM.

You must set up a login ID and password for anyone with access to BMC Remedy ITSM Suite, aside from guest access. People information also includes each person's company, organization, business and home addresses, desk location, support groups, and selected additional information.

This section includes the following topics:

- "Adding people records from a template" on page 51
- "Adding non-support staff" on page 54
- "Adding support staff" on page 55

Adding people records from a template

When you create people records from a template, part of the record is filled with standard information. The BMC Remedy ITSM installation includes standard people templates, as described in the *BMC Remedy ITSM Configuration Quick Start* reference card.

► To create a people record from a template

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.

- 2 Click the Create link next to People.
The People form appears as shown in Figure 3-6.

Figure 3-6: People form

The screenshot shows the 'People' form in the BMC Remedy IT Service Management interface. The form is divided into several sections:

- Personal Information:** Fields for First Name* (Allen), Middle Name, Last Name* (Allbrook), Client Type* (Office-Based Employee), and Contact Type.
- Support Staff:** Support Staff* (No), Phone Number*+, and Email Address.
- Organization Information:** Company*+ (Calbro Services), Organization (Human Resources), and Department (Payroll).
- Location Information:** Site*+ and Site Address.
- Login/Access Details:** Login ID and Password section with Login ID (Allen) and Password (masked).
- Licensing Preferences:** License Type and Full Text License Type.
- Application Permissions:** A list box for Permission Group with a 'Click to Refresh' prompt and an 'Update Permission Groups' button.
- Access Restrictions:** A list box for Access Restriction with a 'Click to Refresh' prompt, an 'Update Access Restrictions' button, and an 'Unrestricted Access' checkbox checked 'Yes'.

At the bottom of the form are 'Add' and 'Close' buttons. A 'Select Template' button is circled in red in the top left corner of the form area.

3 Click Select Template.

The Person Template dialog box appears as shown in Figure 3-7.

Figure 3-7: Person Template dialog box

Template Name	Support Staff	Template Status
CAL-Asset Manager	Yes	Enabled
CAL-Change Assignee	Yes	Enabled
CAL-Change Manager	Yes	Enabled
CAL-Customer/End User	No	Enabled
CAL-Problem Assignee	Yes	Enabled
CAL-Problem Manager	Yes	Enabled
CAL-Support Administrator	Yes	Enabled
CAL-Support Manager	Yes	Enabled
CAL-Support Staff	Yes	Enabled
TEMP SEL007	Yes	Enabled
Support Group 1	Yes	Enabled
PM User 1	Yes	Enabled

Selecting a Template: You may be required to enter a person's First Name, Last Name and Login ID, in the fields above, depending on the template you are selecting. All other fields are optional.

4 Enter the person's first name, middle name, last name, and login ID.

5 Enter the person's phone number. Click in the phone field and press Enter.

You can select a Country Code for a phone number from the list or you can enter one manually. If you omit the phone number, it is set as unknown.

6 Optionally, enter the email address.

NOTE

An email address is required to receive email notifications.

7 From the list select the appropriate template, and then click Select.

TIP

Some templates come with the sample data, if you chose to install it. You may also want to create your own templates before adding People records using templates. See "Creating a people template" on page 109 for more information.

The dialog box closes. A message describes which other fields in the People form are required, based on the template. The People form reappears.

- 8 Complete the required fields in the People form.
For more information about the People form, see the sections that follow this one in the guide.
- 9 On the People form, click Add.
- 10 To add more people records, repeat steps 3 through 9.
- 11 When you are finished adding people records, click Close.

Adding non-support staff

You can create non-support staff records for employees, customers, and vendors. Support staff can use these records to complete forms, such as to indicate a customer who called the help desk to report an incident. If non-support staff have a login ID and password, they can record their own requests on the Requester console.

► To add non-support staff

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.
- 2 Click the Create link next to People.
The People form appears. The People form is shown in Figure 3-6 on page 52.
- 3 Enter the person’s first name and last name.
- 4 Select the client type. Table 3-1 lists the client types available for selection.

Table 3-1: Client types

Client type	Information required
<ul style="list-style-type: none"> ■ Office-Based Employee ■ Field-Based Employee ■ Contractor 	Select or enter a site in the Site field.
<ul style="list-style-type: none"> ■ Customer ■ Prospect ■ Vendor 	Site information is optional.
Home-Based Employee	You must enter home information in addition to the site information.

- 5 Optionally, you can select a contact type, such as Sales or Technical Support.
- 6 Set Support Staff to No.
- 7 Enter the phone number. Click in the phone field and press Enter.
You can select a Country Code for a phone number from the list or you can enter one manually. If you omit the phone number, it is set as unknown.

- 8 Optionally, enter the email address.

NOTE

An email address is required to receive email notifications.

- 9 If this person is a home-based employee, enter the home address and phone number.
- 10 In the Organization Information area, select the company and, optionally, select the organization and department.
- 11 In the Location Information area, select the site.
You must select a site for employees, but it is optional for customers and vendors.
- 12 To allow this person to log in to the system, perform the following steps:
 - a Enter a login ID and password.
People who have access to the People form can change their password. For more information about changing passwords, see “Resetting a person’s password or login ID” on page 133.
 - b If this person needs access to applications, see the instructions in “Adding support staff” on page 55.
Non-support staff typically do not need access to applications. They can create and modify requests from the Requester console. From the Requester console they can access only their own records. If you grant them access to applications and you have multiple companies, however, you might want to restrict their access, as described in “Adding support staff” on page 55.
 - c If required, select a license type of Fixed or Floating.
 - d If you have the BMC Remedy AR System full text search option, select the appropriate Full Text License Type.
- 13 Click Add.
- 14 If you entered a login ID and password for this person, you must confirm the password.
- 15 To add more non-support staff records, repeat steps 3 through 13.
- 16 When you are finished adding people records, click Close.

Adding support staff

You can create people records with standard settings for support staff from the Standard Configuration tab of the Application Administration Console. If you are using templates or want to perform custom configuration, however, complete the People form from the Custom Configuration tab, as described in “Adding a support staff person” on page 117.

► **To add support staff**

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.
- 2 Click the Create link next to People.

The People form appears.

- 3 Complete the fields as described in “Adding non-support staff” on page 54 with the following exception: for Support Staff, select Yes.

When you set Support Staff to Yes, the Support Groups tab appears. For support staff, you must complete the Login/ Access Details tab *and* the Support Groups tab.

NOTE

For more information about setting passwords, see “Resetting a person’s password or login ID” on page 133.

Figure 3-8: People form completed for support staff

The screenshot shows the 'People' form in the BMC Remedy ITSM application. The form is titled 'People' and includes a 'Select Template' button. The 'Personal Information' section contains fields for First Name (Sally), Middle Name, Last Name (Support), Client Type (Home-Based Employee), and Contact Type (Tech Support). The 'Support Staff' checkbox is checked. The 'Phone Number' is 1 713 555-1234, and the 'Home Phone Number' is 1 713 555-6045. The 'Email Address' is SallyS@MyCompany.com. The 'Organization Information' section includes Company (My Company), Organization (IT Operations), and Department (Customer Support). The 'Location Information' section includes Site (Headquarters) and Site Address (2101 City West Blvd, Houston, Texas 77042-2827, United States). The 'Login/Access Details' section includes Login ID (sallys) and Password (xxxx). The 'Support Groups' section includes License Type (Floating) and Full Text License Type (None). The 'Application Permissions' section shows a list of permission groups: Asset Viewer, Incident User, Problem User, and Task User. The 'Access Restrictions' section has a 'Click to Refresh' button and an 'Unrestricted Access' checkbox checked. The form has 'Add' and 'Close' buttons at the bottom.

- 4 Give the person the appropriate BMC Remedy ITSM application permissions.
 - a In the Application Permissions area on the Login/ Access Details tab, click Update Permissions Groups.

The Permission Group dialog box is displayed.

- b In the Permission Group field, select a permission group to add.
For information about permissions, see Appendix A, “Permissions and functional roles.”
 - c If required, select a license type of Fixed or Floating.
 - d Click Add/Modify.
 - e Repeat step b through step d to add additional permission groups, if required.
 - f You can delete permission groups by selecting them from the list and clicking Delete.
 - g When you finish adding permission groups, click Close.
- 5 If you are restricting the access of support staff to certain companies, continue with the steps that follow. Otherwise, select Yes in the Unrestricted Access field.

IMPORTANT

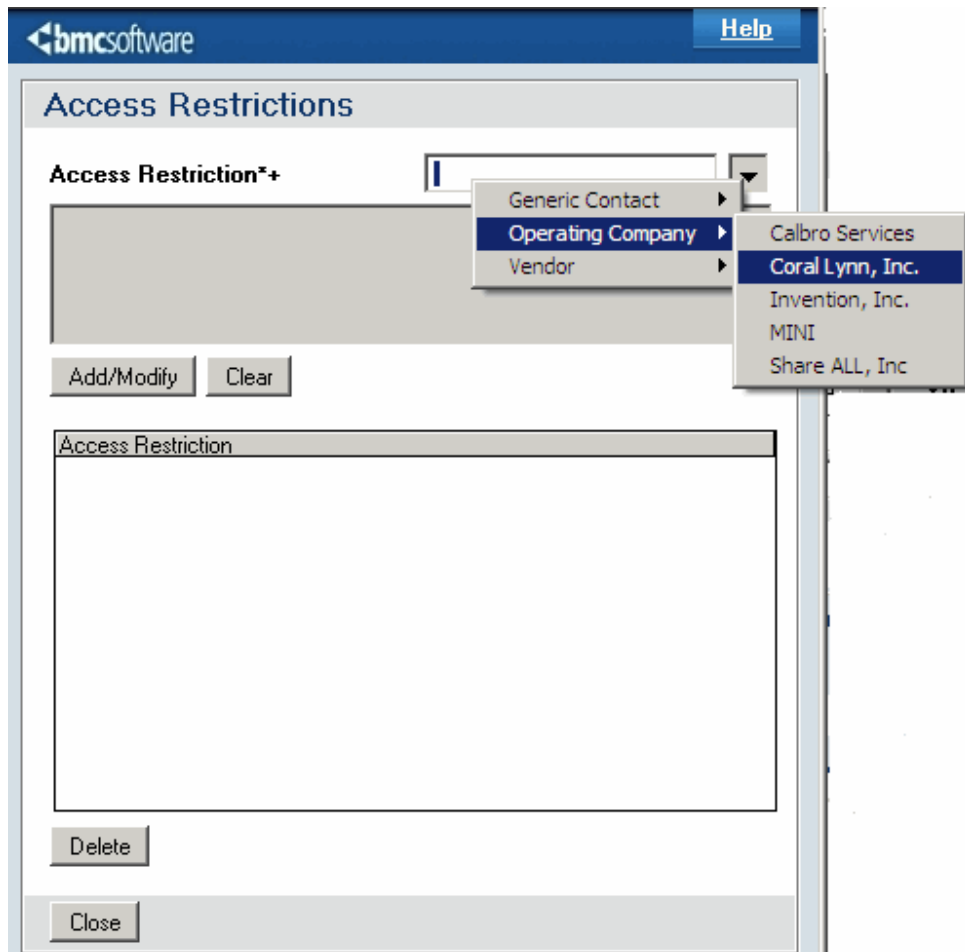
To give an individual access to information in BMC Remedy ITSM, you must give the individual access to specified companies or select Yes for the Unrestricted Access field. If you specify both companies and unrestricted access, unrestricted access overrides the specific companies specified.

To restrict access to specific companies:

- a In the Access Restrictions area, click Update Access Restrictions.

The Access Restrictions dialog box appears as shown in Figure 3-9.

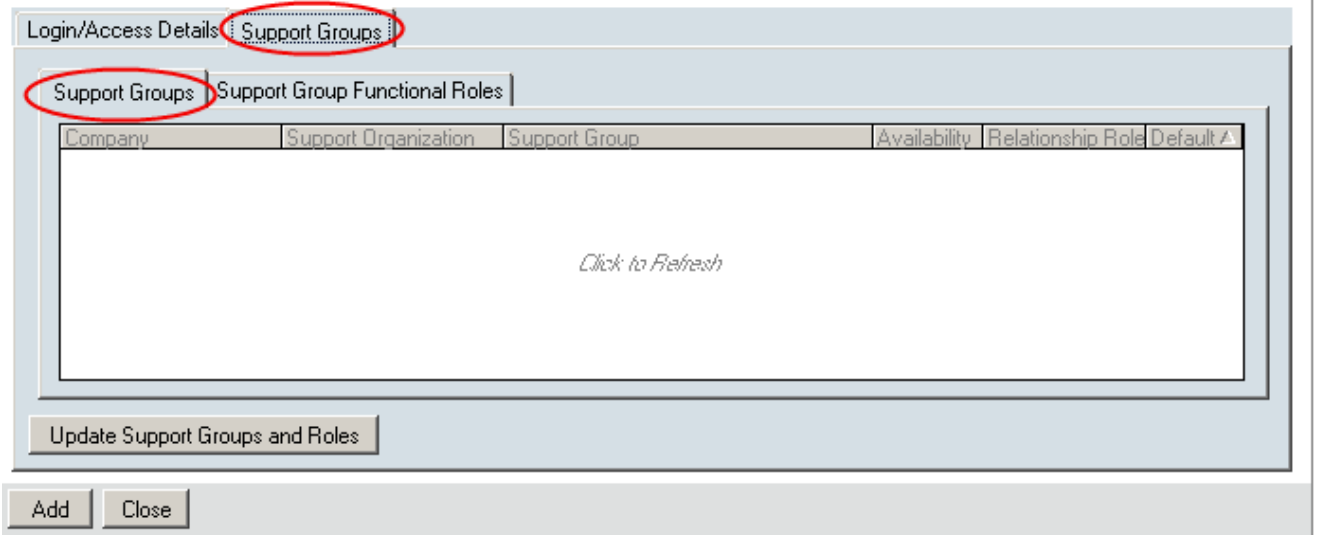
Figure 3-9: Access Restrictions dialog box



- b In the Access Restriction field, select a company to which you want the person to have access.
- c Click Add/Modify.
- d If you want the person to have access to multiple companies, repeat step b through step c.
- e Click Close.

- 6 Relate the person to at least one support group:
 - a Click the Support Groups tab as shown in Figure 3-10. By default, the Support Groups sub-tab is also selected.

Figure 3-10: Support Groups tab selected



- b Click Update Support Groups and Roles.

The Update Support Group Memberships and Roles form appears as shown in Figure 3-11.

Figure 3-11: Update Support Group Memberships and Roles dialog box

- c In the Add Support Group Relationship area, select the Company, Support Organization, Support Group, and Relationship Role.

The relationship roles are informational only:

- **Member**—The person belongs to the support group.
- **Associate Member**—The person has access to modify requests assigned to that support group.

- d Click Add.

TIP

To change the relationship role, select the relationship from the Current Support Group Relationship(s) list and click Make Associate Member or Make Member.

- e If the person belongs to multiple support groups, select the primary support group record from the Current Support Group Relationship(s) list and then click Set to Default.
 - f To make the person unavailable for assigning to requests or incidents, select each related support group from the Current Support Group Relationship(s) and click Mark Unavailable.
- 7 To add support group functional roles, click the Functional Role Update tab shown in Figure 3-12.

Figure 3-12: Functional Role Update tab selected

The screenshot shows the 'Update Support Group Memberships and Roles' window with the 'Functional Role Update' tab selected. The 'Support Group Update' dropdown is also visible. The 'Add Support Group Functional Role' section contains four input fields: 'Company', 'Support Organization', 'Support Group Name', and 'Functional Role', each with a dropdown arrow. Below these fields are 'Add' and 'Clear' buttons. The 'Current Support Group Functional Role(s)' section contains a table with the following columns: 'Company', 'Support Organization', 'Support Group Name', 'Functional Role', and 'Availability'. The table is currently empty. Below the table are 'Mark Unavailable' and 'Delete' buttons. At the bottom of the window is a 'Close' button.

You can use this tab to assign functional roles to people within support groups. Functional roles extend access granted by permissions groups, but only for specific support groups that are used within BMC Remedy ITSM. For example, someone might be a member of two support groups but is a support group manager for only one.

However, the individual could also be a support group manager for all of the support groups to which the individual is assigned. For example, one individual could be assigned all of the following functional roles:

- Infrastructure Change Manager for the Change Management support group
- Incident Manager for the Incident Management support group

- Problem Manager for the Problem Management support group
- 8 To assign the person to a functional role in a support group:
 - a Select the Company, Support Organization, and Support Group Name.

TIP

Items in these lists appear only if support groups were related to the person on the Support Group Update tab.

- b Select a Functional Role for update.
 - c Click Add.

The functional role appears in the table at the bottom of the dialog box.
 - d Repeat steps step a through step c until you have added all of the functional roles.
- 9 Click Close.
 - 10 In the People form, click Add.
 - 11 Confirm this person's password.
 - 12 To add more support staff records, repeat steps 3–10.
 - 13 When you are finished adding support group memberships and roles, click Close.

Creating product categories (optional)

You can create product categories for use in various BMC Remedy ITSM forms. Product categories represent all of a company's products that a help desk will be supporting.

Each product category must be unique. You might find it helpful to view existing categories before creating new categories. For more information about viewing categories, see "Viewing and modifying standard configuration data" on page 68.

► To create product categories

- 1 From the Standard Configuration tab in the Application Administration Console, select the appropriate company.
- 2 Click the Create link next to Product Category.

The Product Category dialog box is displayed as shown in Figure 3-13.

Figure 3-13: Product Category dialog box showing product being added

- 3 In the Product Category dialog box, optionally select the Product Type.
- 4 Select the configuration item (CI) type for which you are creating the product category.
- 5 Select or enter values for the Product Categorization Tier 1, Tier 2, and Tier 3 fields. As you populate each field, values become available in the subsequent fields.

TIP

If the product category requires only one tier to sufficiently group it, enter None for the other two tiers.

- 6 (Optional) Enter a product name.
- 7 If you specify a product name, you must specify a manufacturer. Select a manufacturer, or click New to add a manufacturer.

If you click New:

- a In the New Manufacturer dialog box, enter a company.
- b In the Status field, select Enabled.
- c Click Save.

- 8 In the Product Category dialog box, select Enabled for the status.

TIP

To temporarily prevent the category from being selected in an application, set the status to Proposed.

- 9 Leave the Origin default as Custom.
- 10 Select whether this definition is to be available across all applications in the BMC Remedy ITSM suite.
- 11 Select whether this product definition is just for the current company or is to be used by all companies configured.
- 12 Click Add.
The product category is automatically related to the selected company and, is available on other forms in the selected applications, such as the Incident form.
- 13 To add more product categories, repeat steps 3–12.
- 14 Click Close.

Creating operational categories (optional)

Operational categories list all the operational services that a typical help desk provides, such as adding a user account and changing a server password. It can also contain items that represent symptoms of incidents or problems, such as application failure and network failure. You can create operational categories of services for use in various BMC Remedy ITSM forms.

Each operational category must be unique. You might find it helpful to view existing categories before creating new categories. For more information about viewing categories, see “Viewing and modifying standard configuration data” on page 68.

► To create operational categories

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.
- 2 Click the Create link next to Operational Category.

The Operational Catalog dialog box appears as shown in Figure 3-14.

Figure 3-14: Operational Catalog dialog box

- 3 Select or enter the operational categorization tiers.

After you create an operational category with a particular tier 1 and tier 2, you can select those tiers when creating additional operational categories. For example, if you create an operational category for Add > User > Account, you might first enter all three categories, but when you create an operational category for Add > User > Web Page, you can select both Add and User.

- 4 Select Enabled for the status.

NOTE

You can set the status to Proposed to temporarily prevent the category from being selected from an application.

- 5 Select whether the category is available for the company that you are configuring, or whether it is available for all companies.

- 6 Click Add.

When you save the operational category, it is automatically related to the Global company. This makes the operational category available on other forms, such as the Incident form, for all operating and customer companies. The product category is also available to all BMC Remedy ITSM applications.

- 7 To add more operational categories, repeat steps 3 through 6.

- 8 When you are finished adding operational categories, click Close.

Creating assignment routing in a standard configuration (optional)

You can configure assignment routing so that the system automatically assigns records, such as investigations or change requests, to the appropriate support group. When an BMC Remedy ITSM application uses the routing order, which is a feature of many of the main ticketing forms, it uses information from the form to find an assignment entry and select the support group for assignment.

IMPORTANT

These procedures are for standard assignment processing and do not include instructions for configuring application-specific assignment. For more detailed information about assignments, see “Configuring assignments” on page 198.

IMPORTANT

Configure BMC Remedy ITSM Suite assignments solely from the Application Administration Console. Do *not* configure BMC Remedy ITSM Suite assignments from either the BMC Remedy Assignment Engine Console or from “back-end” forms, because this will cause problems.

► To create assignment routing

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.
- 2 Click the Create link next to Assignment.

The Assignment dialog box appears as shown in Figure 3-15.

Figure 3-15: Assignment dialog box

- 3 In the Event field, select the type of assignment entry.
For example, Incident Owner is used by the BMC Remedy Incident Management application to assign someone to work on the incident. For more information, see the sections on assignments in Chapter 8, “Configuring additional Foundation options.”
- 4 Optionally enter a description.
- 5 In the Assigned Group field, select the support group to assign.
- 6 In the Routing Order area, specify when this assignment entry should be used for the automated assignment.
 - **Company**—Select the location of the incident or request. If this routing applies to all companies, select Global.

- **Operational Categorization**—You can route assignments by operational services.
- **Product Categorization**—You can route assignments by product categorization.

NOTE

Operational Categorization is not used in BMC Remedy Asset Management.

- 7 Click Add.
- 8 Repeat step 3 through step 7 to add more assignment routings.

TIP

You should create all event assignments for your company and groups. Otherwise, you could encounter problems when creating tickets.

- 9 When you are finished adding assignment routings, click Close.

Viewing and modifying standard configuration data

After you configure BMC Remedy ITSM as a standard configuration, you can view the configuration data. When you view the data, a form appears in which you can perform additional custom configuration. For example, if you view support groups, you can use the Support Group form to modify the data already entered or add additional information, such as the business hours for a support group.

► To view or modify standard configuration data

- 1 On the Standard Configuration tab of the Application Administration Console, select the correct company.
- 2 Click the View link next to the category of standard configuration data that you want to view or modify.

The corresponding form appears with search results that display all records for the selected company. If appropriate, records applicable to all companies also appear. For example, if you click the View link next to Support Group, the Support Group form appears, displaying all matching support groups, as shown in Figure 3-16.

The top part of the form displays the search results, and the bottom part displays the selected record.

Figure 3-16: Support Group form displaying the company's support groups

Support Group ID	Support Company*	Support Organization*	Support Group Name*	Status*
SGP000000000028	My Company - MM	IT Support Org.	Backoffice Applications	Enabled
SGP000000000029	My Company - MM	IT Support Org.	Change Management	Enabled
SGP000000000030	My Company - MM	IT Support Org.	Customer Support	Enabled
SGP000000000027	My Company - MM	IT Support Org.	Internal Support	Enabled

Support Group SGP000000000028 (Modify)

BMC REMEDY IT SERVICE MANAGEMENT

Support Group

Support Group | People Display | Roles Display | Business Hours and Holidays

Support Group

Support Group ID: SGP000000000028

Support Company*: My Company - MM

Support Organization*: IT Support Org.

Support Group Name*: Backoffice Applications

Support Group Role*: Tier 2

Description: [Text Area]

Vendor Group*: Yes No

On-Call Group*: Yes No

Group Aliases | Favorite Groups | On-Call

Support Group Alias: [List Box]

Update

3 Select the appropriate record to view the data or make changes.

For additional information about the available forms and making changes in them, see “Standard configuration overview” on page 35 and “Custom configuration overview” on page 37.

4 If you make changes to the form, click Save.

5 Close the form.



Custom Configuration

The following chapters are provided:

- Chapter 4, “Configuring companies and organizational structures”
- Chapter 5, “Configuring people information”
- Chapter 6, “Configuring product and operational catalogs”
- Chapter 7, “Configuring notifications”
- Chapter 8, “Configuring additional Foundation options”
- Chapter 9, “Configuring advanced options”
- Chapter 10, “Configuring BMC Remedy Change Management”
- Chapter 11, “Configuring Release Management”
- Chapter 12, “Configuring approvals”
- Chapter 13, “Configuring BMC Remedy Incident Management”
- Chapter 14, “Configuring BMC Remedy Problem Management”
- Chapter 15, “Configuring BMC Remedy Asset Management”
- Chapter 16, “Configuring the Requester Console application”

4 Configuring companies and organizational structures

This section describes how to configure your organization's structural information such as country, geography, and sites.

The following topics are provided:

- Access point for Company and Organizational Structures custom configuration (page 74)
- Updating company information (page 74)
- Adding geographic information (page 87)
- Configuring support groups (page 90)
- Setting a time zone (page 103)

TIP

The procedures in this section require you to search for information. For more information about searching for information, see "Searching for information" on page 40.

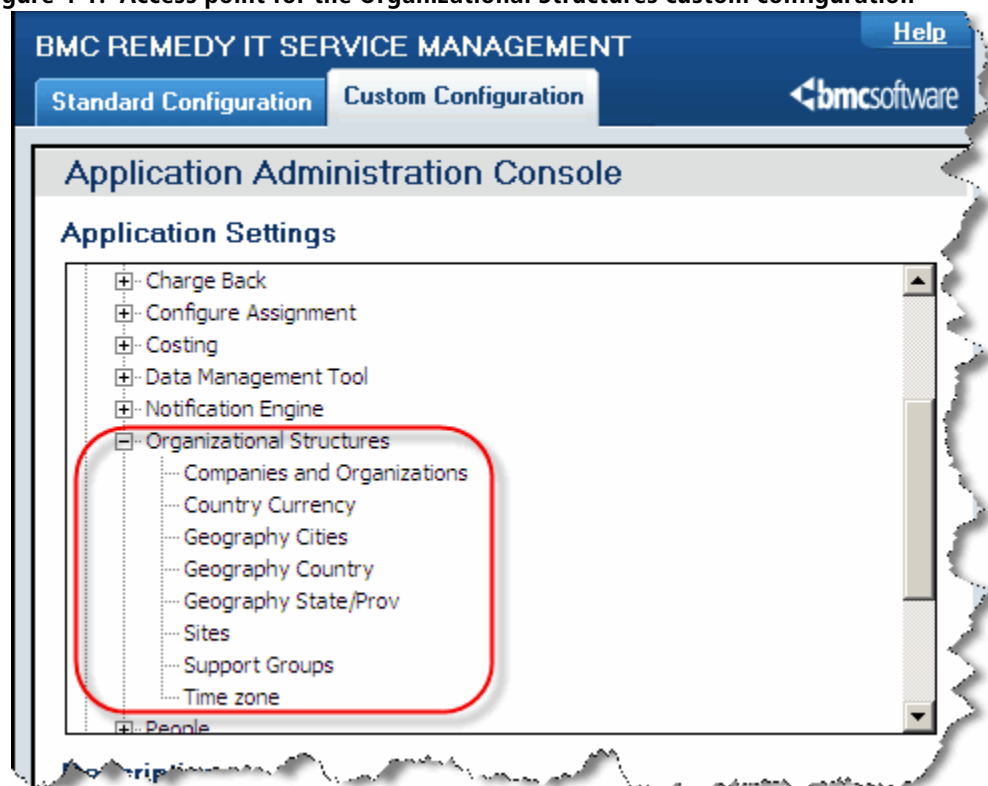
Access point for Company and Organizational Structures custom configuration

The custom configuration for companies and organizational structures described in this section is accessed from the Foundation > Organizational Structures expandable command list on the Custom tab of the Application Administration Console as shown in Figure 4-1.

TIP

Carefully read the instructions for configuring organizational structures in the rest of this section before using the configuration commands in the Foundation > Organizational Structures expandable list.

Figure 4-1: Access point for the Organizational Structures custom configuration



Updating company information

During the standard configuration steps, you add basic company information. You can further customize your company by adding:

- Company aliases
- Location information

- Miscellaneous information, such as hours of operation, time zones, cost centers, budget codes, and website URLs
- Multi-tiered menu structure for a company

Adding a company alias

Company aliases can be used to provide a short name for a company or to group different companies under a common name.

► To add a company alias

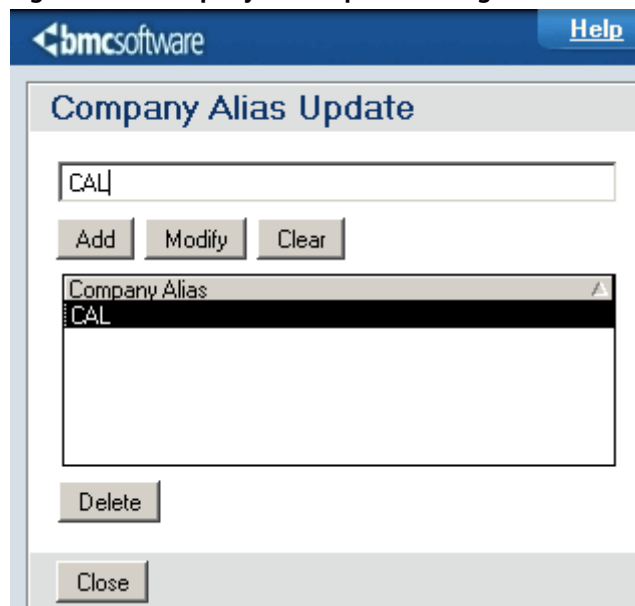
- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, and then click Open.

The Company form appears.

- 3 Search for the company.
- 4 Select the company from the list returned, and select the Alias tab.
- 5 Click Update Alias.

The Company Alias Update dialog box appears as shown in Figure 4-2.

Figure 4-2: Company Alias Update dialog box



- 6 Enter the company alias and click Add.

— TIP —

You can modify or delete a company alias by selecting it from the list and clicking Modify or Delete.

- 7 Click Close.

Adding company locations

Some companies can have multiple locations. The location information includes the region, site name, and site address information.

► To add a company location

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, and then click Open.

The Company form appears.

- 3 Search for the company.
- 4 Select the company from the list, and click the Locations tab.
- 5 Click Update Locations.

TIP

Alternatively, you can view location information by selecting a location from the list and clicking View Site Information.

The Location Update form appears as shown in Figure 4-3.

The company name that you previously selected appears by default.

Figure 4-3: Location Update form

Location Update

Company* Calbro Services

Region

Site Group

Site*

Site Address Information

Street

Country*+

State/Province+

City*+

Zip/Postal Code

Time Zone

Add Clear

Region	Site Group	Site
Americas	United States	Boston Support Center
Americas	United States	Headquarters, Building 1.31
Americas	United States	Headquarters, Building 1.32
Americas	United States	Headquarters, Building 1.33
Americas	United States	Headquarters, Building 1.34
Asia Pacific	Hong Kong	Hong Kong Support Center
Asia Pacific	Japan	Tokyo Support Center
Europe	Amsterdam	Amsterdam Support Center

Remove Removal of the records in the table above will result in the deletion on the Site relationship to this Company. The Site record will not be deleted.

Close

- 6 Enter a region or to add more site or address information to an existing region, select the existing region from the Region list. Examples of regions are Americas, Europe, or Asia Pacific.
- 7 Enter a site group or select one that has been previously defined for the selected region. Examples of site groups are Amsterdam or Paris for the Europe region.
- 8 Enter a site name.
- 9 Enter address information. The Country and City fields are required.
- 10 Select a time zone.

- 11 Click Add.

TIP

You can delete regions by selecting them from the list and clicking Remove.

- 12 Click Close.

Adding and modifying organizations

The organizational structure represents the organizations and departments within a company. You can use the Company, Organization, and Department fields. Sales and Marketing are examples of organizations; Widget Sales is an example of a department.

► To add an organization

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, and then click Open.
The Company form appears.
- 3 Either select the company from the Company list, or search for the company and select it.
- 4 Click the Organizations tab.
- 5 Click Update Organizations.

The Organization Update dialog box appears.

Figure 4-4: Organization Update dialog box

Organization	Department
Human Resources	Benefits
Human Resources	Payroll
Information Technology	Application Development
Information Technology	Customer Service

6 Enter an organization and a department.

7 Click Add.

The organization appears in the lists of organizations in BMC Remedy ITSM.

8 Click Close.

► To modify an organization

1 From the Application Administration Console, click the Custom Configuration tab.

2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, and then click Open.

The Company form appears.

3 Search for the company.

See “Searching for information” on page 40.

4 Select the company, and then click the Organizations tab.

5 Click Update Organizations.

The Organization Update dialog box appears as shown in Figure 4-4.

- 6 Select the organization to modify.

The organization and department for the selected organization appear in the fields at the top of the dialog box.

- 7 Perform either of the following tasks:

- Modify the organization, and then click Modify Organization.
- Modify the department, and then click Modify Department.

All entries of the selected organizations are modified.

- 8 Click Close.

TIP

To delete an organization, select the organization in the Organization Update dialog box, and then click Delete.

Configuring people and support groups

People and support groups can also be configured from the Company form.

► To configure people and support groups from the Company form

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, and then click Open.
The Company form appears.
- 3 Either select the company from the Company list, or search for the company and select it.
- 4 Depending on whether you are adding people or support groups, click the People or the Support Groups tab and refer to:
 - "Support groups"
 - "People" on page 81

Support groups

The Support Groups tab lists the support groups in the company. From this tab you can perform the following tasks:

- Add support groups for the company.
- View or modify support groups for the company.

For more information, see "Working with support staff" on page 117. More detailed support group characteristics can be configured from the Support Groups form, which is described in "Configuring support groups" on page 90.

People

The People tab lists the people in the company. From this tab you can perform the following tasks:

- Add people to the company.
- View or modify the record of anyone in the company.

For more information, see Chapter 5, “Configuring people information.”

Adding miscellaneous company information

Other miscellaneous company information can be added. This information includes time zones, cost centers, budget codes, currencies, and web page URL.

► To add miscellaneous company information

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, and then click Open.

The Company form appears.

- 3 Search for the company.

See “Searching for information” on page 40.

- 4 Select the company from the list, and click the Miscellaneous tab.

The Miscellaneous tab is shown in Figure 4-5.

Figure 4-5: Miscellaneous company information tab

Alias	Locations	Organizations	Support Groups	People	Miscellaneous	Advanced Configuration	
Hours of Operation		M-F 8:00AM - 5:00PM				Hot Line	1-800-HOT-LINE
Time Zone		(GMT-05:00) Eastern Time (US &				Email	info@calbroservices.com
Cost Center		225276				Web Page	http://www.calbroservices.com
Budget Code						Notes	
Currency		USD					

- 5 Update the miscellaneous information as needed.

This information is optional, but it is important to document with the rest of the company information.

NOTE

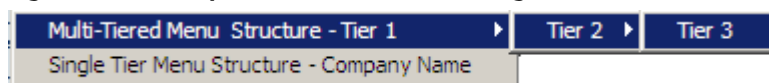
The time zone field is for information only and does not update the system time zone value for the company. To update the system time zone value for a company, follow the instructions in “Setting a time zone” on page 103.

The currency field is for information only and does not update the system currency value for the company. To update the system currency value for a company, follow the instructions in “Adding a country currency” on page 85.

Configuring a multi-tiered company menu structure

Optionally, you can use the Menu Structure Tier fields on the Advanced Configuration tab to create a two-tiered or three-tiered menu structure for selecting the Company value in other forms. The default is a single-tier menu structure. Figure 4-6 shows an example of the multi-tiered and single-tiered company menu structure. This example is also available on the Advanced Configuration tab.

Figure 4-6: Example of multi-tiered and single-tiered menu structure



NOTE

When you save the record, the company is automatically entered in the Menu Structure Tier 1 field on the Advanced Configuration tab.

► To configure a multi-tiered company menu structure

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, and then click Open.

The Company form appears.

- 3 Search for the company.
See “Searching for information” on page 40.
- 4 Select the company from the list and click the Advanced Configuration tab.

The Advanced Configuration tab is shown in Figure 4-7.

Figure 4-7: Advanced Configuration tab for multi-tiered company menu structure

Company Multi-tiered Menu Structure

Menu Structure Tier 1: ...

Menu Structure Tier 2: ...

Menu Structure Tier 3: ...

The Company Multi-tiered Menu Structure is used to simulate a two or three tiered menu structure that will return the Company name. By default, Menu Structure Tier 1 will be set to the Company name for a single tiered Company menu selection.

Example Company Menu: ▼

Regions

Region	Status
Americas	Enabled
Asia Pacific	Enabled
Europe	Enabled
R1	Enabled

Site Groups

Site Group	Region	Status
Amsterdam	Europe	Enabled
Hong Kong	Asia Pacific	Enabled
Japan	Asia Pacific	Enabled
Paris	Europe	Enabled
SiteGrip-1	R1	Enabled

By default the company name appears in the Menu Structure Tier 1 field as the base for a multi-tiered menu structure or as the only company name for a single-tiered menu structure.

- 5 Fill out the Menu Structure Tier 2 and Menu Structure Tier 3 fields with the company structure to be used for the tiered menus.
- 6 Click Save and then Close.

Modifying a region

You can modify and delete regions from the Advanced Configuration tab of the Company form.

► To modify a region

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, then click Open.

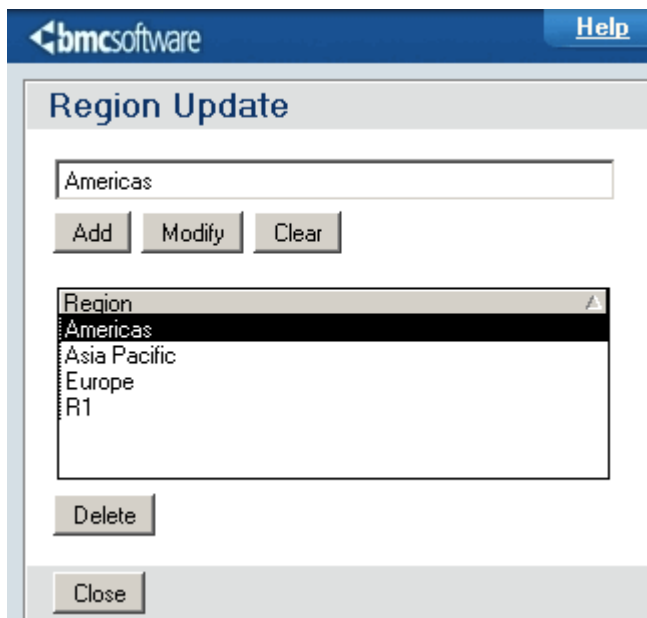
The Company form appears.

- 3 Search for the company.

See “Searching for information” on page 40.
- 4 Select the company, and then click the Advanced Configuration tab.
- 5 Click Update Regions.

The Region Update dialog box appears. Figure 4-8 shows the Region Update dialog box.

Figure 4-8: Region Update dialog box



- 6 Select the region to modify.

The selected region appears in the field at the top of the dialog box.

- 7 Modify the information, and then click Modify.
- 8 Click Close.

TIP

To delete a region, select the region in the Region Update dialog box, and then click Delete.

Modifying a site group

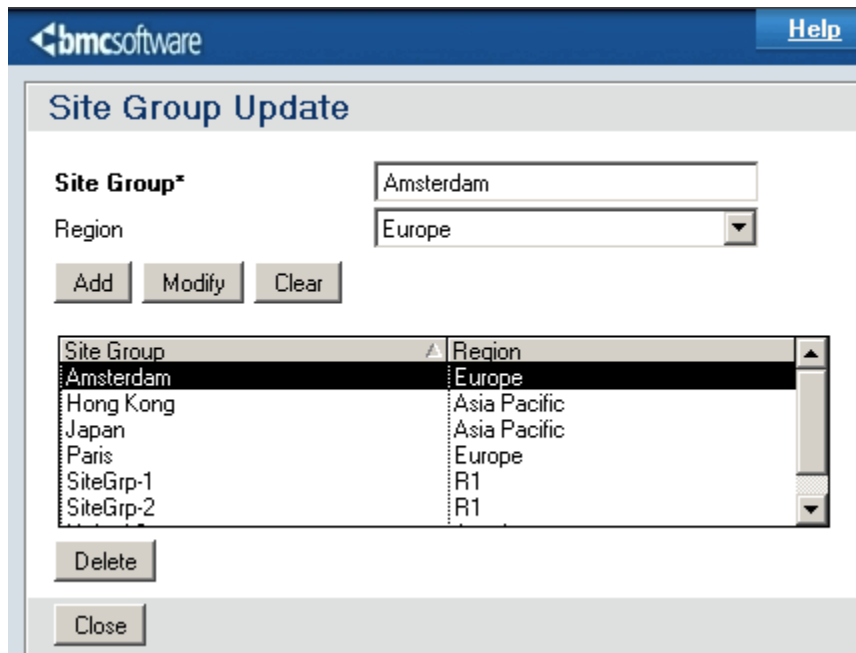
You can modify and delete site groups from the Advanced Configuration tab of the Company form.

► To modify a site group

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Companies and Organizations, then click Open.
The Company form appears.
- 3 Search for the company.
See “Searching for information” on page 40.

- 4 Select the company, and then click the Advanced Configuration tab.
- 5 Click Update Site Groups.
The Site Group Update dialog box appears.

Figure 4-9: Site Group Update dialog box



- 6 Select the site group to modify.
The selected site group appears in the field at the top of the dialog box.
- 7 Modify the information, and then click Modify.
- 8 Click Close.

TIP

To delete a site group, select the site group in the Site Group Update dialog box, and then click Delete.

Adding a country currency

You can add or modify currency information for a country.

► **To add a country currency**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Country Currency, and then click Open.

The Country Currency form appears as shown in Figure 4-10.

Figure 4-10: Country Currency form

- 3 Click the New Request toolbar icon in BMC Remedy User or the New button in your browser.
- 4 Select the country.
- 5 In the Country Code (ISO) field, select a country name. The country code is entered in this field automatically when you select the country name.
- 6 In the Currency field, enter the currency, such as Euro for France, and optionally enter a description.
- 7 In the Multi-Currency field, select a currency number to map to the currency definition that you are making for the selected country. You can enter five different currencies for a country.
- 8 In the Currency ISO Alpha field, enter the three-character ISO 4217 currency code. For currencies defined by supra-national entities, use the two-letter entity codes preceded by an X, such as XCD for the Central Caribbean Dollar.
- 9 Enter any optional currency information.
- 10 Select the status.
- 11 Click Save.

TIP

To modify a country currency, select it, make the modifications, and then click Save.

TIP

To delete a country currency, select it, select Delete for the Status, and click Save. Then choose Actions > Delete in BMC Remedy User, or click the Delete button below the results list in a browser.

Adding geographic information

First you must add a country. The country is used by the miscellaneous country information to define information that depends on country, such as currency. The geographic information further defines the location of your company by identifying the state, province, and city.

NOTE

Because of the amount of such information in the database, narrow a query as much as possible. If you perform a search by city name alone, the search might take a long time and degrade performance on the BMC Remedy AR System server.

► To add a country

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Geography Country, and then click Open.

The Geography Country form appears as shown in Figure 4-11.

Figure 4-11: Geography Country form

The screenshot shows the 'Geography Country' form in the BMC Remedy IT Service Management interface. The form is divided into several sections:

- Country Information:** Fields for 'Country**' (with a dropdown arrow) and 'Country Code (ISO)*' (with a dropdown arrow). A 'Description' field is located below these.
- International Dialing Codes:** Fields for 'Country Code*' (with a dropdown arrow), 'IDD Prefix', and 'IDD Prefix Information' (with a dropdown arrow). A 'Numbering Plan' section includes a radio button for 'North America (NANP)'. To the right of these fields are 'NOTES' and instructions: 'From U.S. and Canada: dial 1 + code + phone number' and 'From other countries: dial IDD + 1 + code + phone number'. A tilde symbol indicates to 'Await a second tone at this stage'.
- International Currency Information:** A table with columns: 'Currency Type', 'Currency ISO Alpha', 'Currency ISO Numeric', and 'Currency Minor Unit'. Below the table is a 'Click to Refresh' button.

- 3 Click the New Request toolbar icon in BMC Remedy User or the New button in your browser.
- 4 Enter or select the country name and two-character ISO 3166 country code, such as Argentina and country code AR.
- 5 In the International Dialing Codes area, select the country to populate the field with the country code, such as 54 for Argentina.
- 6 Enter any optional dialing information.
- 7 Select the status.
- 8 Click Save.

TIP
To modify a country, select it, make the modifications, and then click Save.

TIP
To delete a country, select it, select Delete for the Status, and click Save. Then choose Actions > Delete in BMC Remedy User, or click the Delete button below the results list in a browser.

► To add a state or province

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Geography State/Prov, and then click Open.

The Geography State/Province form appears as shown in Figure 4-12.

Figure 4-12: Geography State/Province form

The screenshot shows the 'Geography State/Province' form in the BMC Remedy IT Service Management interface. The form has a blue header with 'BMC REMEDY IT SERVICE MANAGEMENT' and 'Help' and 'bmcsoftware' logos. The main form area contains several input fields and a status selection area. The 'Country*+' and 'State/Province*+' fields are dropdown menus. The 'Description' field is a large text area. The 'Submitter*' and 'Last Modified By' fields are text boxes. The 'Submit Date' and 'Last Modified Date' fields are also text boxes. The 'Status*' field has six radio button options: Proposed, Enabled, Offline, Obsolete, Archive, and Delete. At the bottom of the form, there are 'Search' and 'Close' buttons.

- 3 Click the New Request toolbar icon in BMC Remedy User or the New button in your browser.
- 4 Select the country.
- 5 Enter the new state or province.
- 6 Select the status.
- 7 Click Save.

— TIP —

To modify a state or province, select it, make the modifications, and then click Save.

— TIP —

To delete a state or province, select it, select Delete for the Status, and click Save. Then choose Actions > Delete in BMC Remedy User, or click the Delete button below the results list in a browser.

► To add a city

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Geography Cities, and then click Open.

The Geography City form appears as shown in Figure 4-13.

Figure 4-13: Geography City form

- 3 Click the New Request toolbar icon in BMC Remedy User or the New button in your browser.
- 4 Select the country.
- 5 Select the state or province.
- 6 Enter the city to add.
- 7 Select the status.
- 8 Click Save.

TIP

To modify a city, select it, make the modifications, and then click Save.

TIP

To delete a city, select it, select Delete for the Status, and click Save. Then choose Actions > Delete in BMC Remedy User, or click the Delete button below the results list in a browser.

Configuring support groups

Support groups are used to group people so that they can be assigned different permissions based on their role within the company. There are several different places where support group information has to be configured before you can create support groups as described in this section:

- The Support Groups structure is defined as Company > Support Organization > Support Group, which represents how a company is structured from a support perspective.

- Data that is used to create support groups is defined in the Support Groups tab of the People or Company form. See “Adding a support staff person” on page 117.

Creating support groups

When you create a support group, a permission group is automatically added to the Group form in BMC Remedy AR System, which can be used to control access to configuration items (CIs) in BMC Remedy Asset Management.

NOTE

To create a support group on the Support Group form, you must complete the information about the Support Group tab and save the form before you can add information to the other tabs.

WARNING

To avoid BMC Remedy AR System server performance issues, add support groups during non-peak hours.

► To add a support group

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Support Groups, and then click Open.

The Support Group form appears as shown in Figure 4-14.

Figure 4-14: Support Group form

- 3 On the Support Group tab, enter or select information in the Support Company, Support Organization, Support Group Name, and Support Group Role fields.

NOTE

The Support Group Role field describes the role that the support group has in the organization, such as the Help Desk function or Tier 2 support.

4 Click Save.

The Support Group is created. You can modify the support group to change On-Call options and add more information.

- **Vendor Group**—Select Yes to indicate that the support group is an external support group or No for an internal support group. Vendor groups are used in BMC Remedy Incident Management for defining underpinning contracts with external vendors. You can also select Vendor Groups on the Vendor tab of the Incident form in BMC Remedy Incident Management.
- **On-Call Group**—Select Yes to indicate that the support group has an on-call schedule that can be used for assignment after normal business hours.

For information about modifying or deleting support groups, see “Modifying information” on page 40.

Group alias

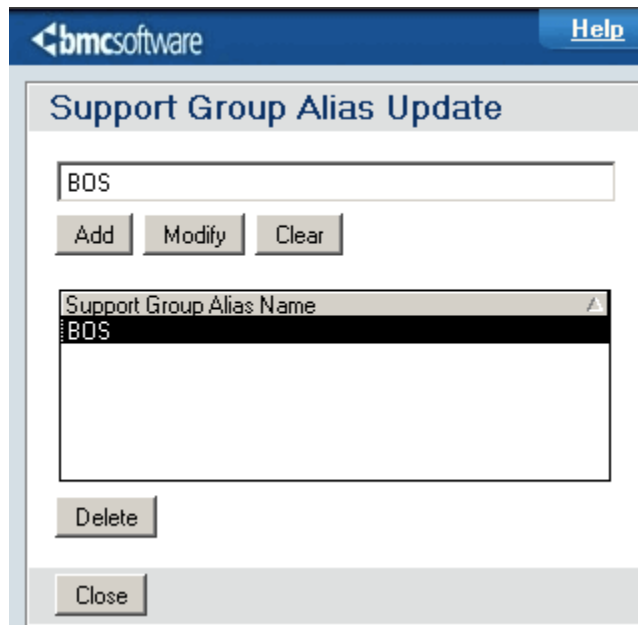
A *group alias* is another term or abbreviation that you can use to reference a support group. Aliases are used in the type-ahead searches on the Support Group field. You can add information to a Support Group field by entering a partial or complete support group or support group alias name and pressing Enter to add the complete support group name. A Support Group entry can have one or more Group Alias entries defined for it.

► To add a group alias

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Support Groups, and then click Open.
The Support Group form appears.
- 3 Search for the support group.
See “Searching for information” on page 40.
- 4 Select the support group, and then click the Group Aliases tab as shown in Figure 4-14 on page 91.
- 5 Click Update.

The Support Group Alias Update dialog box appears as shown in Figure 4-15.

Figure 4-15: Support Group Alias Update dialog box



- 6 Type a support group alias into the field at the top of the dialog box, and then click Add.
- 7 Click Close.

► To modify a group alias

- 1 Search for the support group.
See “Searching for information” on page 40.
- 2 Select the support group, and then click the Group Aliases tab.
- 3 Click Update.

The Support Group Alias Update dialog box appears as shown in Figure 4-15.

- 4 From the list, select the support group alias to modify.
The selected support group alias appears in the field at the top of the dialog box.
- 5 Modify the information, and then click Modify.
- 6 Click Close.

— TIP —

To delete a support group alias, select the support group alias in the Support Group Alias Update dialog box, and then click Delete.

Favorite groups

Favorite groups are support groups that are routinely assigned or reassigned incidents. Favorite groups are used in the Set Assignment Using field on the Assignment tab on BMC Remedy ITSM forms as a quick method of selecting a group.

NOTE

Favorite groups work only for your default group, which is set in the People form.

► **To add a favorite group**

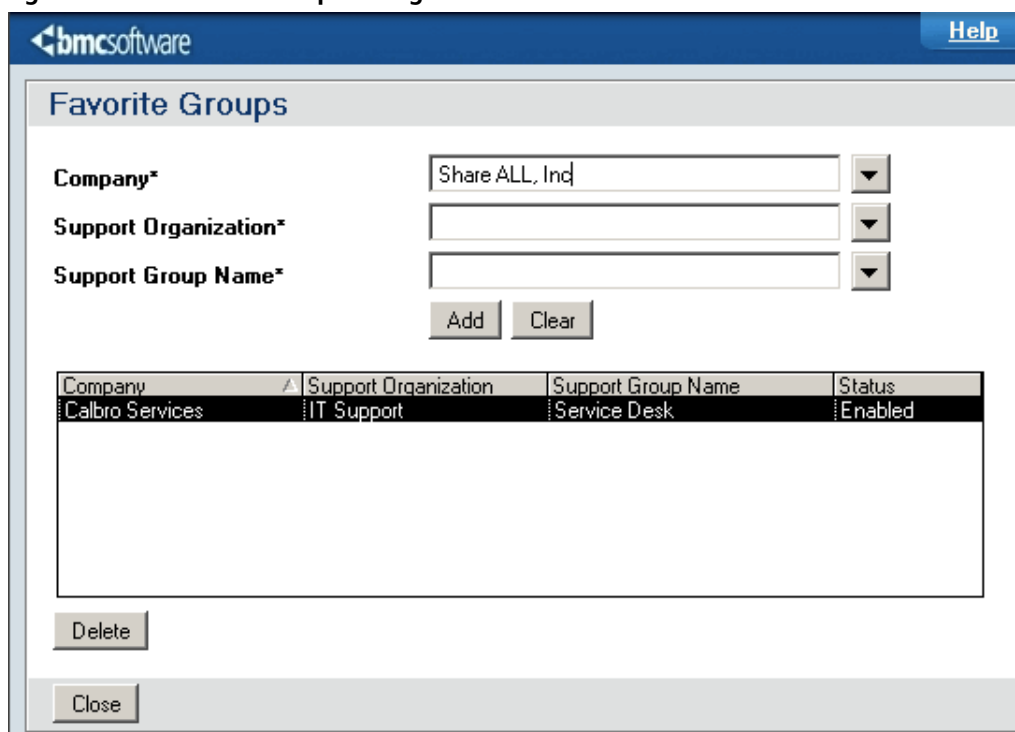
- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Support Groups, and then click Open.

The Support Group form appears.

- 3 Search for the support group.
See “Searching for information” on page 40.
- 4 Select the support group, and then click the Favorite Groups tab.
- 5 Click Update.

The Favorite Groups dialog box appears as shown in Figure 4-16.

Figure 4-16: Favorite Groups dialog box



- 6 Select the Company, Support Organization, and the Support Group Name.

- 7 Click Add, and then click Close.

TIP

To delete a Favorite Group, select the Favorite Group in the Favorite Groups dialog box, and then click Delete.

On-call schedules

Support groups that are responsible for critical items can be scheduled to be available, or *on-call*, for certain hours of the day. The on-call feature enables you to set up support schedules for paging notifications. On-call functionality works with your third-party paging software to send page notifications. When a support group is specified as an on-call group, assignment to the support group will notify the appropriate people using the on-call schedule.

► To add an on-call schedule

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Support Groups, and then click Open.
The Support Group form appears.
- 3 Search for the support group.
See “Searching for information” on page 40.
- 4 Select the support group, and then click the On-Call tab.

5 Click Add.

The On-Call Support Update form appears as shown in Figure 4-17.

Figure 4-17: On-Call Support Update form

The screenshot shows the 'On-Call Support Update' form in the BMC Remedy interface. At the top, the 'Support Group Name' is 'Backoffice Support'. The 'On-Call Paging Type' is set to 'Generic'. The 'Generic Pager' section includes fields for 'Pager Service Provider', 'Notification Pager+', 'Pager E-mail+', and 'Notification Language'. The 'Individual Pager' section includes a 'Remedy Login ID' field and a 'Profile' button. Below these are three settings sections: 'Incident Management Settings', 'Change Management Settings', and 'Request Management Settings'. Each has an 'Active' checkbox checked 'Yes' and a 'Send if' dropdown menu. A note explains the 'Active' flag and the 'Send if' dropdown. The 'Paging Times' section has a table for setting start and end times for each day of the week. At the bottom, there are 'Save' and 'Close' buttons.

6 Select the On-Call Paging Type option.

- Select Generic if the support group shares a pager for on-call.

NOTE

If you select Generic as the On-Call Paging Type, you must complete the Generic Pager section of the form. Also, you must set up pager service provider information in the Pager Service Provider Configuration form. See “Configuring pager service” on page 180.

- Select Individual if each support group member has a different pager. If you select Individual, you must define paging parameters in each individual’s people profile entry in the People form.

NOTE

If you set the On-Call Paging Type option to Individual, you must complete the Individual Pager section of the form.

- 7 Select Enabled for the Status of the on-call schedule.
Do either step 8 or step 9.
- 8 If you selected the on-call paging type Generic and the pager service provider requires a phone number, perform the following steps:
 - a Select the pager service provider.
 - b Click in the Notification Pager field and press Enter.

The Phone details dialog box appears as shown in Figure 4-18.

Figure 4-18: Phone details dialog box

- c In the Phone details dialog box, enter the pager phone number, including the Personal Identification Number (PIN), if there is one, and then click OK.
 - d If you selected the Pager Service Provider supports email pages option, enter the Pager Email address.
 - e Select the language in which the pager message is to be received.
- 9 If you selected the on-call paging type Individual, perform the following steps:
 - a Enter the Remedy Login ID.
 - b If you want to work with the People record associated with the login ID entered, click Profile.
- 10 To specify the applications in which this on-call schedule profile is used, select Yes for the Active option in the Incident Management Settings, Change Management settings, and Request Management Settings areas, as appropriate.

- 11 Select Priority and Risk values to determine when an on-call page is sent.

For example, if Send if Priority >= is set to High within the Incident Management Settings area, on-call pages are sent only for incidents where the priority is High or Critical. Leave this field blank if you want on-call pages to be sent independent of priority and risk.

TIP

Under Change Management Settings, Risk Level 5 is the highest even though 1 is indicated as the highest under the field. This is being fixed for a later release of BMC Remedy ITSM Suite.

- 12 Click Update in the Paging Times area to set up the on-call schedule.

The Define Business Hours form appears as shown in Figure 4-19.

Figure 4-19: Define Business Hours form

- 13 Click the Server Time Zone button to fill the Time Zone field.
- 14 Select the hours or click the 7 X 24 or Default button, and then click Save.
- 15 In the On-Call Support Update dialog box, click Save.

► Modifying an on-call schedule

- 1 Search for the support group.
- 2 Select the support group, and then click the On-Call tab.
- 3 Select the on-call schedule, and then click View.

The selected on-call schedule appears.

- 4 Modify the information, and then click Save.

NOTE

To delete an on-call schedule, select the schedule, and then click Delete.

Setting up group notifications



Use the Group Notification Settings tab to set group notifications. Using group notifications, you can configure the system to send notifications to a support group list, instead of just to individuals within a group, which is the result when you set the Group Notifications field in the Notifications Preferences form. Using this feature can improve notification performance if you are sending notifications to a group of more than 25 people. For more information about configuring group notifications on this tab, see “Setting up group notifications” on page 175.

Adding members to a support group

From the People Display tab, you can add individuals to and remove them from a support group.

► To add members to a support group

- 1 Make sure that the people have been added in the People form and are designated as Support Staff.
- 2 From the Application Administration Console, click the Custom Configuration tab.
- 3 From the Application Settings list, choose Foundation > Organizational Structures > Support Groups, and then click Open.
The Support Group form appears.
- 4 Search for the support group.
See “Searching for information” on page 40.
- 5 Select the support group, and then click the People Display tab.
- 6 Click Add.

TIP

The People Display and Roles Display tabs on the Support Group form show important information about support staff individuals. **People Display** shows the individuals who belong to the support group. **Roles Display** shows the roles for each individual within a group.

The Support Staff Search dialog box appears as shown in Figure 4-20.

Figure 4-20: Support Staff Search dialog box

Support Staff Search

Search Criteria

Company+ ▼

First Name+

Last Name+

Phone Number+

First Name	Middle Name	Last Name	Business Phone Number	Company
<i>Click to Refresh</i>				

Relationship Role ▼

Assignment Availability Yes No

- 7 Search for the support staff to add using the search criteria fields provided.
- 8 From the list select the individuals to relate to the support group.
- 9 Click Add, and then click Close.

Business hours and holidays

You can view and modify the hours of operation for each support group on the Business Hours and Holidays tab of the Support Group form. Support group business hours and holidays are used to determine when group notifications are sent and they are also used in effort log tracking, which uses actual and business hours to calculate the effort for the people to which incidents are assigned.

► To add business hours and holidays

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Support Groups, and then click Open.

The Support Group form appears.

- 3 Search for the support group.
See “Searching for information” on page 40.
- 4 Select the support group, and then click the Business Hours and Holidays tab.
- 5 In the Business Hours area, click Update.
The Define Business Hours form appears.
- 6 To select the time zone for the BMC Remedy AR System server, click the Server Time Zone button.

NOTE

To set the server time zone, you must first specify the time zone by using the Time Zone form. See “Setting a time zone” on page 103.

- 7 Enter the start and end times or click the 7 X 24 or Default button, and then click Save.

The business hours that you specified appear on the Business Hours and Holidays tab as shown in Figure 4-21.

Figure 4-21: Business Hours and Holidays tab showing business hours added

The screenshot shows the BMC Remedy IT Service Management interface. At the top, there is a blue header with the text "BMC REMEDY IT SERVICE MANAGEMENT" and a "Help" link. Below the header, the "Support Group" section is visible, with tabs for "Support Group", "People Display", "Roles Display", and "Business Hours and Holidays". The "Business Hours" section contains two tables:

Sunday Start	Monday Start	Tuesday Start	Wednesday Start	Thursday Start	Friday Start	Saturday Start
10:00:00 AM	12:00:00 AM	12:00:00 AM	12:00:00 AM	12:00:00 AM	12:00:00 AM	10:00:00 AM

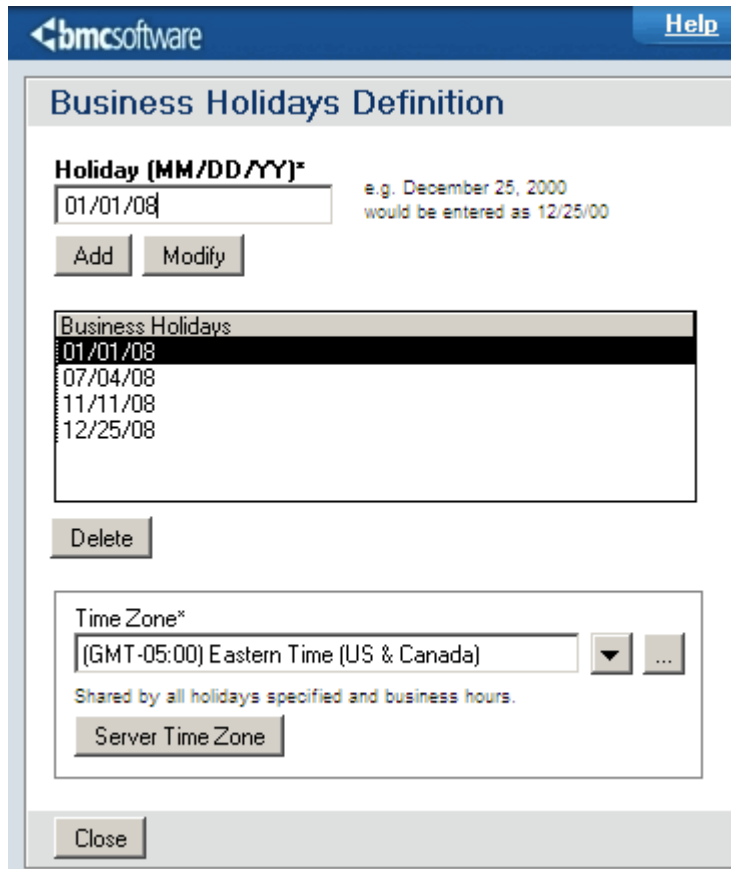
Sunday End	Monday End	Tuesday End	Wednesday End	Thursday End	Friday End	Saturday End
10:00:00 PM	11:59:00 PM	11:59:00 PM	11:59:00 PM	11:59:00 PM	11:59:00 PM	10:00:00 PM

Below the tables is an "Update" button. The "Business Holidays" section contains a list of dates: 01/01/08, 07/04/08, 11/11/08, and 12/25/08. To the right of the list is a text box explaining that Business Hours & Holidays are used by the system for notifications, service level management actions, and time duration calculations. Below the text box is a "Delete Business Hrs & Holidays" button. At the bottom left of the Business Holidays section is another "Update" button.

- 8 Click the Update button in the Business Holidays section of the tab.

The Business Holidays Definition dialog box is displayed as shown in Figure 4-22.

Figure 4-22: Business Holidays Definition dialog box



- 9 On the Business Holidays Definition dialog box, click the Server Time Zone button to select the time zone for the BMC Remedy AR System server.
- 10 In the Holiday field, enter a holiday date.
- 11 Click Add, and then enter the remaining holidays.
- 12 When you have entered all holidays, click Close.
- 13 On the Business Hours and Holidays tab of the Support Group form, click Save and then click Close.

Setting a time zone

The default time zone for your server is indicated by a Yes value in the Server Time Zone field. If your server is in a different time zone, you must change the default for the BMC Remedy ITSM applications to function properly.

► To specify a time zone

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structures > Time zone, and then click Open.

The Time Zone form appears as shown in Figure 4-23.

Figure 4-23: Time Zone form

The screenshot shows the 'Time Zone' configuration form in the BMC Remedy IT Service Management console. The form is titled 'Time Zone' and contains several input fields and a dropdown menu. The 'Server Time Zone*' field is circled in red. At the bottom of the form, there are fields for 'Submitter*', 'Last Modified By', 'Submit Date', and 'Last Modified Date', each with a search icon. The 'Search' and 'Close' buttons are located at the bottom left of the form.

- 3 Click Search to find the time zone in which your application server is located.
- 4 Select your time zone from the results list.
- 5 To make the selected time zone the default, select Yes in the Server Time Zone field.
- 6 Click Save and then click Close.

5 Configuring people information

This section describes how to configure information for people in the BMC Remedy ITSM Suite, including each person's company, organization, business and home addresses, desk location, support groups, and other information.

The following topics are provided:

- Access point for the People custom configuration (page 106)
- People information (page 107)
- Tenancy mode (page 107)
- Setting the VIP and Sensitivity fields on People records (page 108)
- Creating people records using templates (page 108)
- Adding people without using templates (page 113)
- Adding additional contact information for support and non-support people (page 123)
- Adding people attributes (page 125)
- Adding additional work information (page 126)
- Relating CIs to people (page 127)
- Adding cost centers (page 130)
- Adding login IDs and access rights (page 130)
- Providing access to people records of other companies (page 130)
- Resetting a person's password or login ID (page 133)
- Adding notification information (page 140)
- Adding alternate approver information (page 140)
- Deleting people records (page 141)

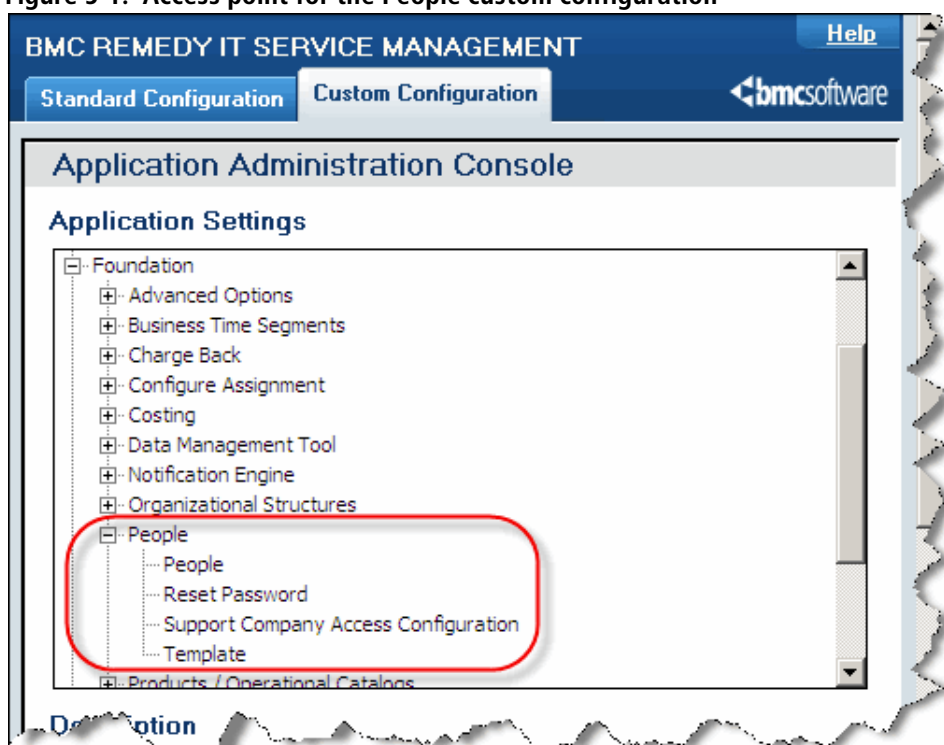
Access point for the People custom configuration

The custom configuration for people described in this section is accessed from the Foundation > People expandable command list on the Custom tab of the Application Administration Console as shown in Figure 5-1.

TIP

Carefully read the instructions for configuring people in the rest of this section before using the configuration commands in the Foundation > People expandable list.

Figure 5-1: Access point for the People custom configuration



People information

People can be defined as support and non-support staff. Support Staff are typical users of the application. They require a login ID, application permissions, and BMC Remedy AR System licenses, and they must belong to at least one support group. Non-support users are all other people that work for your company who would require services from your support groups.

Permissions and functional roles determine what people information can be viewed or modified by different users. For example, if you have the permission of People Contact Admin, you can change a person's company or contact information, but not that person's support group association. For information about permissions, see "Permissions" on page 480. An individual can have one or many permission sets.

Certain selections that you make on the People form determine whether you need to complete additional information. For example, if you are creating a record for a support person, you must enter a login ID before saving the entry. Also, when creating a record for a new person, you must enter a site for an office-based employee and a home address for a home-based employee.

IMPORTANT

Always configure people records by opening the BMC Remedy ITSM People form from the Application Administration Console. Information that you add or modify on the BMC Remedy ITSM People form is automatically updated to the BMC Remedy AR System User form, but information updated on the User form is not updated to the People form.

TIP

The procedures in this section require you to search for information. For more information about searching for information, see "Searching for information" on page 40.

Tenancy mode

If you are using the multi-tenancy feature of BMC Remedy ITSM Suite, you can use the Company field to control access when configuring people. In multi-tenancy mode, people who are granted unrestricted access have access to data either from all companies or the companies that you specify, and can submit and manage records, such as investigations and change requests, for those companies.

For more information about setting the tenancy mode, see "System settings" on page 218. For information about configuring the BMC Remedy ITSM Requester Console for unknown users, see "Granting users access to the Requester Console" on page 467.

Set the Tenancy Mode for individuals' company access as follows:

- If you require unknown users to access the BMC Remedy ITSM Requester Console, set Tenancy Mode to Single-Tenancy.
- To allow an individual access to a single company, just set Tenancy Mode to Single-Tenancy.
- To allow people access to *all* companies, set Tenancy Mode to Multi-Tenancy.

To allow people access to more than one company, in addition to setting Tenancy Mode to Multi-Tenancy, you also need to select which companies these are, as described in "Providing access to people records of other companies" on page 130.

Setting the VIP and Sensitivity fields on People records

VIP is used to identify an important individual within the organization. The Client Sensitivity field is used to designate the level of attention that individuals require. The VIP designation appears when a profile for a person marked as VIP is retrieved on the Incident Request form.

Figure 5-2 shows a customer flagged as VIP.

Figure 5-2: Customer flagged as VIP

The screenshot shows a web form titled "Customer Information" with a red "VIP" label in the top right corner. The form has several tabs at the top: "Customer", "Contact", "Classification", "Work Info", "Assignment", "Vendor", and "F". The "Customer" tab is selected. The form contains the following fields:

- First Name*+:** kelly
- Middle Name:** (empty)
- Last Name*+:** marks
- Phone Number*+:** 416 229 (3546)

At the bottom of the form, there are four buttons: "Create", "Modify", "Search", and "Clear Customer Information".

Creating people records using templates

You can create records for both support and non-support staff. Non-support staff members include anyone who is not a member of the IT organization or who does not create or modify records in BMC Remedy ITSM.

This section includes the following topics:

- "Creating a people template" on page 109
- "Creating people records from a template" on page 112

Creating a people template

To simplify the process of adding people, you can create people templates that contain standard information for different types of people.

► To add a people template

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > Template, and then click Open.

The Configure Person Template dialog box appears.

- 3 Click Create.

The Configure Person Template form appears as shown in Figure 5-3.

Figure 5-3: Configure Person Template form

- 4 Enter a name for the template and select a status.
- 5 On the Person Details tab, enter information for the template.
 - a In the Details area, select a profile status.
 - b Select the client type and enter the job title.

- c Select values for the VIP and Client Sensitivity fields. For more information about these fields, see “Setting the VIP and Sensitivity fields on People records” on page 108.

NOTE

If these fields are left blank, the default values (Standard and No) are used.

- d In the Support Staff field, select Yes if the template is for adding support staff.

NOTE

If you select Yes, the Support Groups tabs is available. If you select No, this tab is not available.

- e Select whether the person is available for assignment.

TIP

By default, when you create a support record this field is set to Yes if the Support Staff field is set to Yes. Then when you modify the record you can change the value. At this time, the field name turns red if you select No and green if you select Yes. You can also set assignment availability for the support groups to which the individual belongs from the Support Groups tab. For more information about the Support Groups tab, see step 19 on page 120.

- f Optionally, select the graphic icon below the Person’s Image field to add a picture of the support person.
- g In the Organization Information area, optionally select the company, organization, and department.
- h In the Location Information area, optionally select the region, site group, and site. Site information is required when you add an office-based employee.

NOTE

If you select a site without first selecting a region or a site group, the region and site group fields are automatically filled if the site has been related to the company using these fields.

- i In the Contact Information area, optionally enter the mobile phone, fax, or pager number.

NOTE

You can select a Country Code for a phone number from the list in the dialog box that is displayed, or you can enter one manually.

- j Optionally enter a desk location and mail station.

- 6 Select the Login/Access Details tab as shown in Figure 5-4.

Figure 5-4: Login / Access Details tab

The screenshot shows the 'Login/Access Details' tab of a software interface. It features three tabs at the top: 'Person Details', 'Login/Access Details', and 'Support Groups'. The 'Login/Access Details' tab is selected. The interface is divided into two main sections: 'License Types' and 'Application Permissions Group List'.
 In the 'License Types' section, there are two dropdown menus for 'License Type' and 'Full Text License Type'. To the right, there is a 'Default Notify Mechanism' dropdown menu. Below this dropdown is a text box stating: 'The Default Notify Mechanism is used only as a backup notification method. It is required when creating a User. The actual notification mechanism used is defined in the 'Notification Preferences' page on this form.'
 The 'Application Permissions Group List' section contains two dropdown menus for 'Permission Group+' and 'License Type', along with 'Add/Modify' and 'Clear' buttons. Below this section is a table with two columns: 'Permission Group' and 'License Type'. The table is currently empty. At the bottom left of the interface is a 'Delete' button.

- 7 To supply license information for this template, select the license types:
- In the License Type field in the License Types area, select the BMC Remedy AR System license type to assign.
 - If you have the BMC Remedy AR System full text search option, select a Full Text License Type.

NOTE

These fields are required for a template for a support staff person.

- 8 In the Application Permissions Group List area, optionally add the appropriate BMC Remedy ITSM permission groups:
- In the Permission Group field, select a permission group to add.
For information about permissions, see “Permissions” on page 480.
 - If required, select a license type of Fixed or Floating.
 - Click Add/Modify.
- 9 Select the default notify mechanism for notifications. For more information about notifications, see Appendix 7, “Configuring notifications.”
- 10 If you are defining a support staff person template, relate the person template to at least one support group:

NOTE

This relationship is required for a template for a support staff person.

- 11 Select the Support Groups tab as shown in Figure 5-5.

Figure 5-5: Support Groups tab

- 12 Select the support company, organization, and group name, and then click Add.

TIP
If you are adding more than one support group to the template, you can make one the default by selecting it from the list and clicking Set to Default.

- 13 Click Save.

NOTE
To add information from the template that you just created to the People form, choose Quick Links > Select Template in the navigation pane of the form.

Creating people records from a template

When you create a people record from a template, part of the record is filled with standard information from the template. The BMC Remedy ITSM Suite installation includes standard people templates (see the *BMC Remedy ITSM Configuration Quick Start* reference card, and you can create custom templates).

For instructions for creating People records from a template, see “Adding people records from a template” on page 51.

Adding people without using templates

This section includes the following topics:

- “Adding non-support staff” on page 113
- “Working with support staff” on page 117

Adding non-support staff

This section describes how to:

- Create non-support staff records.
Support staff records can be used in BMC Remedy ITSM Suite forms, but a non-support staff person needs a profile to log on to the system.
- Create a non-support staff profile.

Creating non-support staff records

Use non-support staff records for employees, customers, and vendors. Support staff can use these records to complete forms, such as to indicate a customer who called the help desk to report an incident. Non-support staff with a login ID and password can record their own requests in the Requester Console.

Records differ from profiles. Records contain information used to complete forms, whereas profiles give someone access to BMC Remedy ITSM with specified permissions.

For the procedure to create non-support staff records, see “Adding non-support staff” on page 54.

Creating a non-support person profile

Non-support staff members include anyone who is not a member of the IT organization or does not create or modify requests in BMC Remedy ITSM. The following procedure shows how to configure the minimum information required to add a profile for a non-support staff person. For information about modifying or deleting people information, see “Modifying information” on page 40.

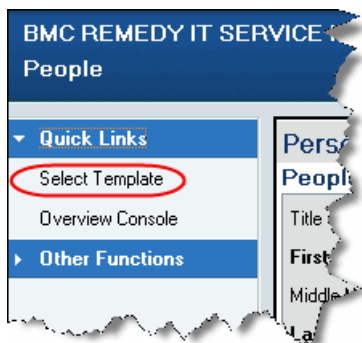
► To add a non-support person profile

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

TIP

If you created a people template that applies to the person you are adding, choose Quick Links > Select Template in the navigation pane to add standard information from a template. For information about adding people templates, see “Creating a people template” on page 109.



- 3 Enter the person’s first name and last name.
- 4 Select the client type and a profile status.

TIP

If you select Office-Based Employee, you must select or enter a site in the Site field. If you select Home-Based Employee, you must enter home information about the More Details tab.

- 5 Select values for the Client Sensitivity and VIP fields. For more information about these fields, see “Setting the VIP and Sensitivity fields on People records” on page 108.

NOTE

If these fields are left blank, the default values (Standard and No) are used.

NOTE

For a non-support staff person profile, the Assignment Availability field is not available.

- 6 Make sure that Support Staff is set to No.
- 7 In the Organization Information area, select the company and enter any optional information.
- 8 In the Contact Information area, optionally enter the business phone number.

To enter the phone number, click in the phone field and press Enter. You can select a Country Code for a phone number from the list or you can enter one manually.

- 9 Optionally, enter the email address.

NOTE

An email address is required to receive email notifications.

- 10 In the Location Information area, select the site information.

NOTE

If you select a site without first selecting a region or a site group, the Region and Site Group fields are automatically filled if the site has been related to the company using these fields.

A completed General tab of the People form for a non-support staff person might appear as shown in Figure 5-6.

Figure 5-6: Completed People form for a non-support staff person—General tab

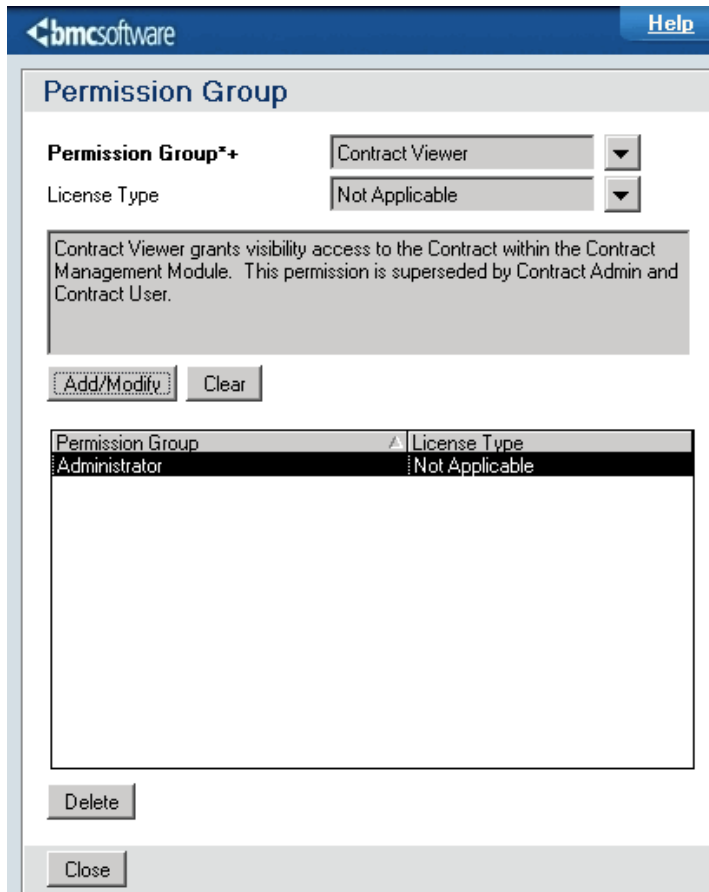
The screenshot displays the 'People Information' form for a non-support staff person. The 'Person ID' is PPL000000000020. The 'People Information' section includes fields for Title (Mr.), First Name (Manuel), Last Name (Ramirez), Client Type (Office-Based Employee), Job Title (HR Specialist (Spanish)), and Nickname. Other fields include Corporate ID, Profile Status (Enabled), Contact Type, Client Sensitivity (Standard), VIP (No), Support Staff (No), and Assignment Availability (No). A 'Person's Image' field is present but empty. Below this is a tabbed interface with tabs for General, More Details, Attributes, Work Info, Cls, Financials, Login/Access Details, Support Groups, Notifications, and Alternate Approvers. The 'General' tab is active, showing 'Organization Information' (Company: Calbro Services, Organization: Human Resources, Department:), 'Contact Information' (Business: 1 212 555-5454 (1010), Email Address: M.Ramirez@calbroservices.com), and 'Person's Image' (a table with columns for File Name, File Size, and Title). The 'Location Information' section includes Region (Americas), Site Group (United States), Site+ (Headquarters, Building 1.31), Site Address (1114 Eighth Avenue, 31st Floor, New York, New York 10036, United States), Desk Location, and Mail Stop. The 'Assignment Information' section includes Capacity Rating, Open Tickets, Task Capacity Rating, and Open Tasks (0).

- 11 Click the Login/Access Details tab.

- a Enter the login ID for the person to use to access BMC Remedy ITSM applications.
- b Enter a password, if required. People who have access to the People form can change their password.

- 12 Give the person the appropriate BMC Remedy ITSM application permissions.
 - a In the Application Permissions area, click Update Permissions Groups.
The Permission Group dialog box appears as shown in Figure 5-7.

Figure 5-7: Permission Group dialog box



- b In the Permission Group field, select a permission group to add.
For information about permissions, see “Permissions” on page 480.
- c If required, select a license type of Fixed or Floating.
- d Click Add/Modify.
- e Add any other needed permission groups.

TIP

To delete a permission group, select it from the list and click Delete.

- f When you finish adding permission groups, click Close.
- 13 In the License Type field in the Licensing Preferences area, select the BMC Remedy AR System license type to assign.

- 14 If you have the BMC Remedy AR System full text search option, select a Full Text License Type.

See “Searching for information” on page 40.

- 15 If you are using the Access Restrictions list to restrict access to specific companies, complete the next step. Otherwise, select Yes for the Unrestricted Access check box, the default.

IMPORTANT

To give an individual access to information in BMC Remedy ITSM Suite, you must give the individual access to specified companies or select Yes for the Unrestricted Access field.

- 16 To allow support people to see people records in other companies and create records for these other companies, such as incidents, refer to “Providing access to people records of other companies” on page 130.
- 17 On the People form, click Save.

Working with support staff

This section includes the following topics:

- “Adding a support staff person”
- “Making a support staff person unavailable” on page 122
- “Providing access to people records of other companies” on page 130

Adding a support staff person

Support staff members include anyone who is a member of the IT organization or who creates or modifies requests in BMC Remedy ITSM. To add a support staff person, you must complete the Person Information area on the top portion of the People form and information about the General, Support Groups, and Login/Access Details tabs.

► To add a support staff person

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

TIP

If you created a people template that applies to the person you are adding, choose Quick Links > Select Template in the navigation pane to add standard information from a template that you created. For information about adding people templates, see “Creating a people template” on page 109.

- 3 Enter the person's first name and last name.
- 4 Select the client type and a profile status.

TIP

If you select Office-Based Employee, you must select or enter a site in the Site field. If you select Home-Based Employee, you must enter home information about the More Details tab.

- 5 Select values for the Client Sensitivity and VIP fields. For more information about these fields, see "Setting the VIP and Sensitivity fields on People records" on page 108.

NOTE

If these fields are left blank, the default values (Standard and No) are used.

- 6 In the Support Staff field, select Yes.

The Assignment Availability field is set to Yes, which identifies a support staff person as available for assignment requests, such as incidents, problems, and change requests.

For information about changing assignment availability, see "Adding additional work information" on page 126.

- 7 Select whether the person is available for assignment.

TIP

By default, this field is set to Yes when you create the People record. When you modify the record you can change this setting. The field name turns red if you select No and green if you select Yes. You can also set assignment availability for the support groups to which the individual belongs from the Support Groups tab. For more information about the Support Groups tab, see step 19 on page 120.

- 8 In the Organization Information area, select the company and enter any optional information.
- 9 In the Contact Information area, optionally enter the business phone number.
To enter the phone number, click in the phone field and press Enter. You can select a Country Code for a phone number from the list or you can enter one manually.
- 10 Optionally, enter the email address.

NOTE

An email address is required to receive email notifications.

- 11 In the Location Information area, select the site.

NOTE

If you select a site without first selecting a region or a site group, the Region and Site Group fields are automatically filled if the site has been related to the company using these fields.

- 12 If you are using the BMC Remedy Assignment Engine for assignment to individuals by capacity, enter information in the Capacity Rating and Task Capacity Rating fields. The read-only Open Tickets and Open Tasks fields are used to store the number of open tickets and tasks assigned to the individual.

A completed General tab of the People form for a support staff person might appear as shown in Figure 5-8.

Figure 5-8: Completed People form for a support staff person—General tab

The screenshot shows the 'General' tab of the 'People' form in BMC Remedy. The form is for a person with ID PPL000000000047. The 'People Information' section includes fields for Title, First Name (J), Last Name (Kelly), Client Type (Office-Based Employee), and Support Staff (Yes). The 'Organization Information' section shows Company (Calbro Services), Organization (Human Resources), and Department (Payroll). The 'Location Information' section includes Region (Europe), Site Group (Paris), and Site+ (Paris Support Center). The 'Contact Information' section has Business (###) and Email Address (jkelly@bmc.com). The 'Assignment Information' section shows Capacity Rating and Task Capacity Rating fields, with Open Tickets and Open Tasks (0) displayed. The 'Person's Image' field is empty.

- 13 Select the Login/ Access Details tab.
- Enter the login ID for the person to use to access BMC Remedy ITSM applications.
 - Enter a password, if required. Individuals who have access to the People form can change their password.
- 14 Give the person BMC Remedy ITSM application permissions:
- In the Application Permissions area, click Update Permissions Groups. The Permission Group dialog box appears as shown in Figure 5-7.
 - In the Permission Group field, select a permission group for the person. For information about permissions, see “Permissions” on page 480.
 - If required, select a license type of Fixed or Floating.

- d Click Add/Modify.
 - e Add any other needed permission groups.
 - f When you finish adding permission groups, click Close.
- 15 In the License Type field in the Licensing Preferences area, select the BMC Remedy AR System license type to assign.
 - 16 If you have the BMC Remedy AR System full text search option, select the appropriate Full Text License Type.
 - 17 If you are using the Company field to restrict access to specific companies, give the support staff person access to data within the applications by assigning the person to specific companies. Otherwise, select Yes in the Unrestricted Access field.

IMPORTANT

To give an individual access to information in BMC Remedy ITSM Suite, you must give the individual access to specified companies or select Yes for the Unrestricted Access field.

- 18 To allow support people to see people records in other companies and create records for these other companies, such as incidents, refer to “Providing access to people records of other companies” on page 130.
- 19 Relate the person to at least one support group:
 - a Select the Support Groups tab.
 - b On the Support Groups tab, click Update Support Groups and Roles.

The Update Support Group Memberships and Roles form appears as shown in Figure 5-9.

Figure 5-9: Support Group Memberships and Roles form

Support Group Update | Functional Role Update

Add Support Group Relationship

Company* Calbro Services

Support Organization*

Support Group*+

Relationship Role*

Add Clear

Current Support Group Relationship(s)

Company	Support Organization	Support Group Name	Relationship Role	Availability	Default
Calbro Services	IT Support	Service Desk	Member	Yes	Yes
Calbro Services	IT Support	Backoffice Support	Member	Yes	No
Calbro Services	IT Support	Frontoffice Support	Member	Yes	No

Set to Default Make Associate Member Mark Unavailable Delete

Close

- c In the Add Support Group Relationship area, select the Company, Support Organization, Support Group, and Relationship Role.

The relationship roles are Member and Associate Member. These values are informational only. *Member* means that the person belongs to the support group. *Associate Member* means that the person has access to modify requests assigned to that support group.

TIP

Click Make Associate Member or Make Member to change the relationship role.

- d Click Add.
- e A support person can belong to more than one support group. To select the primary support group, select the support group, and then click Set to Default.
- f To make the person unavailable for assignment such as for requests or incidents, click Mark Unavailable for each support group to which the person is related.

- 20 Select the Functional Role Update tab.

You can use this tab to assign functional roles to people within support groups. Selections in lists for the Company, Support Organization, and Support Group Name fields on this tab appear only if support groups have been related to the person on the Support Groups tab.

Functional roles extend access granted by permissions groups, but only for specific support groups that are used within BMC Remedy ITSM. For example, someone might be a member of two support groups but only be a support group manager for one.

- 21 Click Close.
- 22 Click Save in the People form.

Making a support staff person unavailable

Occasionally a support staff person might be away from the company for a period of time or assigned to another project or role for a short time. Instead of deleting the support staff person, you might want to just make them unavailable for assignments.

► To make a support staff person unavailable

- 1 On the People form for the individual you want to make unavailable, select the Support Groups tab.
- 2 From the list of support groups on the Support Groups sub-tab, select Mark All Unavailable and click Save.

This changes the assignment availability to No for all support group relationships, including functional roles. The Assignment Availability field also turns red indicating it has been set to No.

TIP

To set only some of the support group relationships as unavailable, on the Support Groups tab, click Update Support Groups and Roles and click Mark Unavailable for the roles that you want to make unavailable.

► To make the support staff person available for assignments

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

- 3 Search for the person.
See "Searching for information" on page 40.

- 4 On the People form for the support staff period, click Resume Availability.

TIP

You can also make an individual available for assignment by selecting Yes in the Assignment Availability field in the People Information section (top half) of the People form. The Assignment Availability field turns green indicating it has been set to Yes.

- 5 Click Save.

Adding additional contact information for support and non-support people

You can add details such as home and additional contact information about the More Details tab of the People form.

► To add additional address and contact information for people

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears as shown in Figure 5-6.

- 3 Search for the person.
See “Searching for information” on page 40.

- 4 Select the person, and then select the More Details tab, which is shown in Figure 5-10.

Figure 5-10: More Details tab on the People form

- 5 Click Edit Home Address.
The Address Details dialog box appears.
- 6 Enter the street address and ZIP or postal code, and select the country, state or province, city, and time zone.
- 7 To add phone numbers, click in the phone field and press Enter.

NOTE
You can select a Country Code for a phone number from the list in the dialog box that is displayed, or you can enter one manually.

- 8 Optionally, enter information in the Additional Contact Information area.

NOTE
In the ACD field, you can optionally enter an Automatic Call Distribution (ACD) identification number for use in integrations with ACD systems.

- 9 Click Save.

Adding people attributes

You can enter additional profile information for individuals using the Attributes tab of the People form. For example, you can use attribute profiles to set up employee benefits or wallet information to store credit cards.

NOTE

Adding and viewing HR Attendance Management information, Benefit information, and Wallet information requires Contact People Admin permission or higher.

► To create attributes for people

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

- 3 Search for the person.

See “Searching for information” on page 40.

- 4 Select the person, and then select the Attributes tab.

The available list of attribute types varies depending on your permissions.

You can create, view, or delete attributes. For example, if you select Access ID as the Attribute Type and click Create, and the Access ID form is displayed.

The Access ID form shows the configuration of Access IDs that a person has within the applications that the person uses.

- 5 Depending on the Attribute Type that you select, complete the dialog box that appears. When you save and close that dialog box, the attribute appears in the Attributes list on the People form.
- 6 Click Save on the People form.

Adding additional work information

You can add additional work information about a person on the Work Info tab of the People form. This information can be added to record changes you make to the people record and acts as a change history.

► To add work information

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.
The People form appears.
- 3 Search for the person.
See “Searching for information” on page 40.
- 4 Select the person, and then click the Work Info tab.
- 5 In the Work Info Type field, select a type, such as Mailing List, General Information, or People Task.
- 6 In the Date field, click the button to the right of the field to select a date. If you leave this field blank, the current date is used.
- 7 In the Source field, select the communications source, such as Email, Fax, Phone, or Voice Mail.
- 8 In the Summary field, enter a short description for the Work Info entry.
- 9 In the Details field, enter the complete description for the Work Info entry.
- 10 To add an attachment:
 - a Right-click under the File Name header, and then choose Add.
 - b Navigate to the location of the file.
 - c Select the file, and then click Open to attach the file.

NOTE

You can attach a maximum of three files.

- 11 For the Locked option, select Yes to prevent the Work Info entry from being modified after it has been saved.
- 12 Set the view access of the work information to be viewable by people internal to the company this person belongs to or by all people.

- 13 Click Save.

The entry is added to the Work Info History table.

NOTE

To view an existing entry, select the entry in the Work Info History table and click View.

Relating CIs to people

The CIs tab of the People form enables you to relate configuration items (CIs) to people. For more information about CIs, see the *BMC Remedy Asset Management User's Guide*.

► To relate CIs to people

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

- 3 Search for the person.
See "Searching for information" on page 40.
- 4 Select the person to relate to the CIs, and then click the CIs tab.

- 5 Click Relate.
The CI Relationships Search form appears.

Figure 5-11: CI Relationships Search form

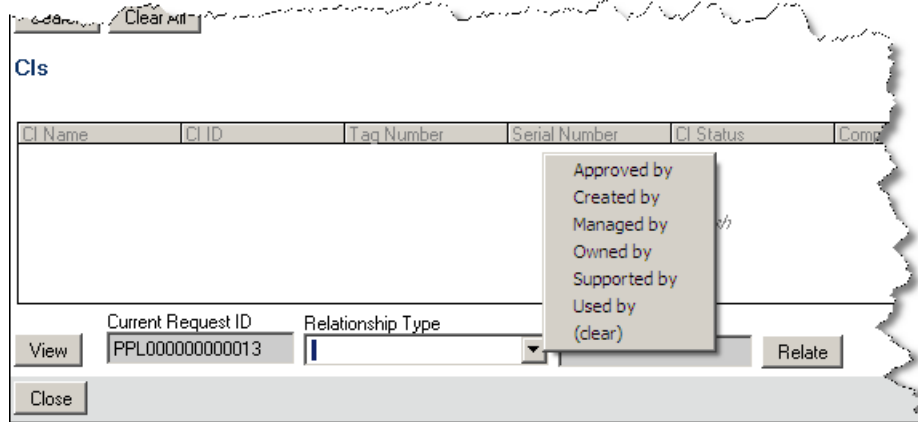
The screenshot shows the 'CI Relationships Search' form in the BMC Remedy interface. The form is divided into several sections:

- Search Criteria:** Includes a search scope dropdown set to 'Impact/Urgency, Status and Location'.
- Basic Search:** Contains input fields for CI ID, CI Name, Tag Number, Serial Number, CI Type (dropdown), and Dataset Name (pre-filled with 'BMC.ASSET'). A 'Clear' button is located below these fields.
- Product Categorization:** A vertical stack of dropdown menus for Company, Tier 1, Tier 2, Tier 3, Product Name+, Model/Version, and Manufacturer. A 'Current Product' button is at the bottom of this section.
- Advanced Search:** A large text area with a 'Clear' button and a '...' button.
- Search and Clear All:** Two buttons at the bottom left of the search criteria section.
- CI Results Table:** A table with columns: CI Name, CI ID, Tag Number, Serial Number, CI Status, Company, and Product Name. The table is currently empty and contains the text 'Click to Refresh'. Navigation links 'Previous' and 'Next' are visible to the right of the table.
- Relationship Action:** A section at the bottom with a 'View' button, a 'Current Request ID' field (pre-filled with 'PPL00000000122'), a 'Relationship Type' dropdown, a 'Selected CI Name' field, and a 'Relate' button. A 'Close' button is on the far left, and a 'CI Relationship Viewer' button is on the far right.

- 6 Enter search criteria for the CIs to relate, and then click Search.
- 7 Select the CI to relate to the person.

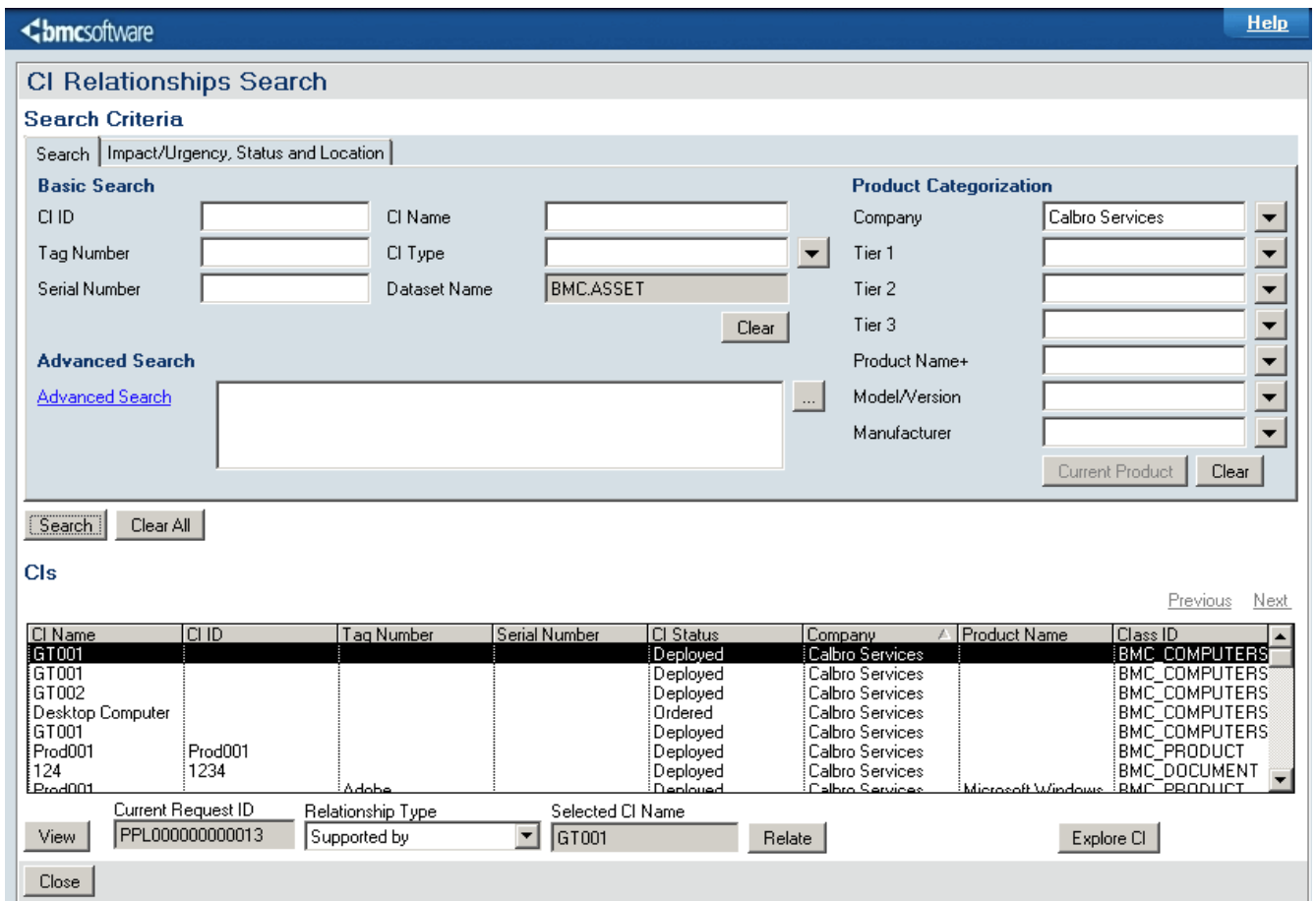
- Select the relationship type, and then click Relate, as shown in Figure 5-12.

Figure 5-12: CIs area showing Relationship Type being selected



The CIs tab is updated with the relationship as shown in Figure 5-13.

Figure 5-13: CIs tab updated with the newly created CI



- Click Close.

Adding cost centers

From the Financials tab of the People form, you can configure cost centers. For information, see “Tracking costs” on page 185.

Adding login IDs and access rights

The Login/Access Details tab stores the login ID, licensing information, and permissions groups for the individual specified on the People form. See “Adding non-support staff” on page 113 or “Adding a support staff person” on page 117 for information about entering Login/Access Details information.

Providing access to people records of other companies



Typically support people can only access people records for companies to which they have been granted access. The support company access configuration feature allows support people to see people records in other companies. The advantage of using this feature is that support personnel can then create records such as incidents for people in other companies. This feature configures these capabilities for you. For more information, see the *BMC Remedy ITSM Guide to Multi-tenancy*.

For information about granting company access:

- For non-support staff, see step 15 on page 117 in “Creating a non-support person profile” on page 113
- For support staff, see step 17 on page 120 in “Adding a support staff person” on page 117

In the following procedure, the example uses Share ALL, Inc. as the support company and Coral Lynn, Inc. as the customer company.

► To provide a support company with access to your customer company's people records

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > Support Company Access Configuration, and then click Open.

The Support Company Access Configuration form appears as shown in Figure 5-15.

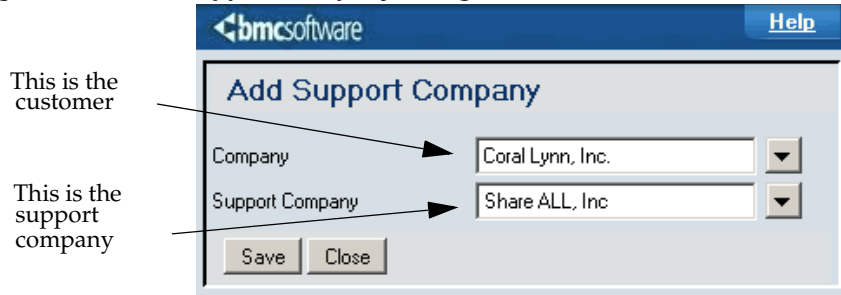
- 3 In the Company field, select a customer company and then click Search.

In this example, you would enter Coral Lynn, Inc. The table below the Company field displays any mappings for the selected company.

- 4 If the mapping you need does not exist, click Create.

The Add Support Company dialog box appears as shown in Figure 5-14.

Figure 5-14: Add Support Company dialog box



- 5 In the Company field, select the customer company.

It should default to the company you previously entered before doing the search. This is the customer company to which you want to assign the support company's people records access.

- 6 In the Support Company field, select a support company.

This is the company to which the support person has been granted access to on the People record (Login/ Access tab). For more information about granting company access, refer to step 15 on page 117 in "Creating a non-support person profile" on page 113 for non-support staff and step 17 on page 120 in "Adding a support staff person" on page 117 for support staff. People who have been granted access to the support company (Share ALL, Inc. in this example) can access people records in the accessible company (Coral Lynn, Inc. in this example).

- 7 Click Save.

The records that you created appears in the table below the Company field, indicating that the mapping was created. Figure 5-15 shows a mapping for Calbro Services.

Figure 5-15: Support Company Access Configuration form with mapping

Support Company Access Configuration

Company: Coral Lynn, Inc. | Support Company: Share ALL, Inc.

Company	Support Company	Status
Coral Lynn, Inc.	Share ALL, Inc	Enabled

Update permission on people records for the Company selected below.
 Coral Lynn, Inc. | Update

TIP
 To delete, disable, or enable a support company mapping, select it from the list and click Delete, Set Offline, or Set Enable.

- 8 To update permissions on People records for the selected company, select the same customer company from the list, and then click Update.

NOTE
 You must perform this step to activate these settings.

The People records are updated with the company access permissions.

Resetting a person's password or login ID



In BMC Remedy ITSM Suite, you can reset a password in several ways depending on your permissions and your role. This section also describes how to delete a login ID.

Password guidelines

Password guidelines force users to choose a combination of characters and numbers that make it more difficult for people to guess another user's password. The Enforce Policy and Restrictions setting in the User Password Management Configuration form determines whether password guidelines are used for BMC Remedy ITSM Suite. These guidelines can be further customized from the default HIPPA guidelines by the BMC Remedy AR System administrator.

For example, after passwords have been reset, users may or may not be forced to change their passwords the next time they log on. Check with your BMC Remedy AR System administrator for information about your site's password guidelines. For more information about configuring BMC Remedy AR System password guidelines, see the *BMC Remedy Action Request System Configuration Guide* guide.

The default password guidelines, which follow the HIPPA guidelines, are as follows:

- Blank passwords are not allowed.
- The password cannot match the login name.
- The old password cannot be used when changing the password.
- The password cannot be a dictionary word, which is achieved by the following rules:
 - Must be a minimum of eight alphanumeric characters
 - Must include at least one uppercase alphabetic character.
 - Must include at least one lowercase alphabetic character.
 - Must include at least one non-alphanumeric (special) character (for example, #, !, +, %).

Other default restrictions include:

- The administrator or an individual with Security permission must be able to change the password at any time.
- Users (except for the administrator and the password's user) cannot change the password. This is accomplished through the Dynamic Group Access field (ID 60988) on the User form.
- The account is disabled if the user has not changed the password after the number of days specified in the "Days after force change until disablement" field in the BMC Remedy AR System User Password Management Configuration form.

Where can passwords be reset from?

Table describes the different locations from which you can reset passwords, depending on your permissions and which mode you are in.

Table 5-1: Different ways to access change password functionality

Location of Password reset functionality	Permissions and BMC Remedy ITSM Suite state of use	See
Password field on the Login/ Access Details tab of the People form	<ul style="list-style-type: none"> ■ Only the Contact Organization Admin and Contact Support Admin permissions groups can update the Password field in People records for non-support staff. ■ Only Administrators can update the Password field in People records for any individual. ■ In both cases, target users must change their password on the next login. 	"Using the Password field on the People form" on page 135
Reset Password link in the Application Administration Console	Administrators and permission groups with Security permission. Password rules are not enforced on reset password, but they are enforced when target users are forced to change their password on the next login.	"Using the Update Password link in the Application Administration Console" on page 136
Change Password link on the People (Search) or People (Modify) form when an individual is changing their own password	Any user with permission to modify People records. Password rules are enforced on the changed password. Individuals are not forced to change their password on the next login.	"Using the Change Password link on the People form" on page 137
Change password link on the BMC Remedy AR System home page	Any user with permission to modify People records. Password rules are enforced on the changed password. Individuals are not forced to change their password on the next login.	<i>BMC Remedy Action Request System Configuration Guide</i> guide

Using the Password field on the People form

TIP

You can only use this method to reset your own password.

► To reset your own password from the People form

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

- 3 Search for the individual whose password you want to change.
See “Searching for information” on page 40.
- 4 Select the Login/ Access Details tab as shown in Figure 5-16.

Figure 5-16: Login/Access Details tab on the People form

- 5 In the Password field, enter a simple password and click Save. At this point, password guidelines are not enforced.

If the Enforce Policy and Restrictions setting in the BMC Remedy AR System Use Password Management Configuration form is turned on, the next time the individual logs on they are prompted to change their password, which must adhere to the password guidelines stated in “Password guidelines” on page 133. For more information about the BMC Remedy AR System User Password Management Configuration form, see the *BMC Remedy Action Request System Configuration Guide* guide.

Using the Update Password link in the Application Administration Console

TIP

Use this method if you are an Administrator or in a permission group with Security permission. Administrators and those with Security permission can change the password for any individual.

► To reset a password from the Application Administration Console

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > Reset Password, and then click Open.

The Password Reset dialog box is displayed as shown in Figure 5-17.

Figure 5-17: Password Reset dialog box in the Application Administration Console

The screenshot shows a dialog box titled "Password Reset" within the BMC Remedy IT Service Management interface. The dialog box has a dark blue header with the text "BMC REMEDY IT SERVICE MANAGEMENT" and a "Help" button. The main content area is titled "Support Contact Information" and contains several input fields: "Login ID+:" (with "Allen" entered), "First Name:", "Last Name:", and "Middle Name:" (all empty). Below these are "Organization:" and "Department:" (both empty), and "Company:" and "Phone Number Business:" (both empty). At the bottom of the dialog box, there is a "Password+" label next to a text input field, and three buttons: "OK", "Cancel", and "Close".

- 3 In the Login ID field, enter the login ID of the person whose password you want to change and press Enter.
- 4 The rest of the fields are populated with the corresponding people data and the Password field is activated.
- 5 Enter the new password.
- 6 Click OK and then click Close.

If the Enforce Policy and Restrictions setting in the BMC Remedy AR System Use Password Management Configuration form is turned on, the next time the individual logs on they are prompted to change their password, which must adhere to the password guidelines stated in “Password guidelines” on page 133. For more information about the BMC Remedy AR System User Password Management Configuration form, see the *BMC Remedy Action Request System Configuration Guide* guide.

Using the Change Password link on the People form

TIP

Use this method if you have permission to update people records and only if you want to change your own password.

► **To reset your own password from the People form**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

- 3 Change to Search mode.

See “Searching for information” on page 40.

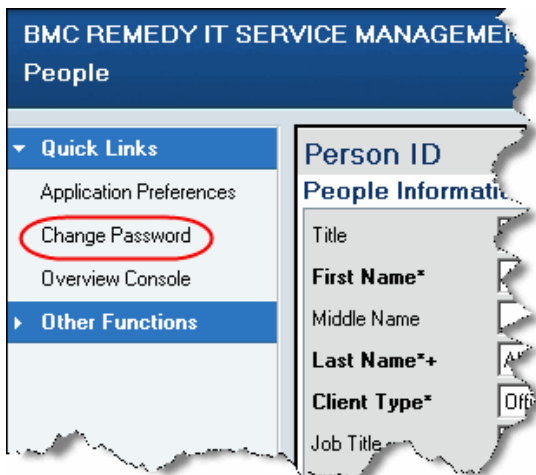
The Change Password link becomes available in the Quick Links menu in the sidebar of the People form.

TIP

The Change Password link also becomes available if you select your own People record for modification.

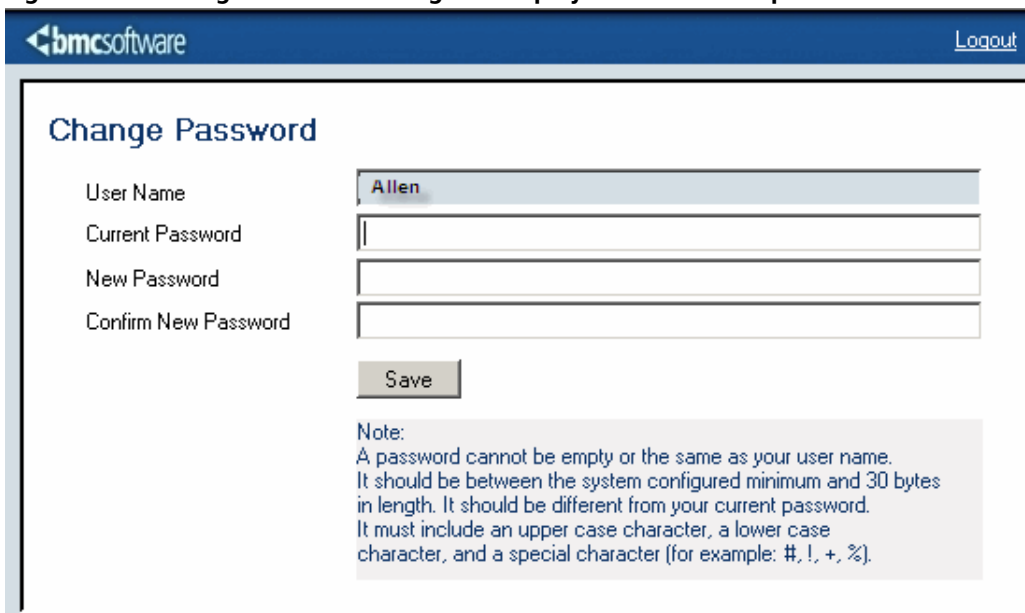
- 4 Click the Change Password link as shown in Figure 5-18.

Figure 5-18: Change Password link on the People (Search) form



The Change Password dialog box is displayed as shown in Figure 5-19. The User Name field is populated with your user name.

Figure 5-19: Change Password dialog box displayed from the People form



- 5 Enter your current password followed by your new password twice.
- 6 Click Save.

NOTE

You are not prompted to change your password the next time you log in.

Removing a person's login ID

When a person leaves a company or moves to a role within a company that does not require access to BMC Remedy ITSM Suite, you can remove that person's login ID. However, you cannot remove the login ID of a support staff person. To perform this function, you must have the Contact Organization Admin or Contact Support Admin permission.

► To remove a person's login ID

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.
The People form appears.
- 3 Search for the person, and then select the person with the login ID to remove.
See "Searching for information" on page 40.
- 4 In the navigation pane, choose Other Functions > Remove Login ID as shown in Figure 5-20.

Figure 5-20: Remove Login ID function



NOTE

To perform this function, you must have the Contact Organization Admin or Contact Support Admin permission.

You are prompted to confirm and the login ID is removed.

Adding notification information

The Notifications tab stores information about notification preferences for the varying notification events as well as pager information and default notification methods. Using the Notifications tab is described in Chapter 7, “Configuring notifications.” You can also add group notifications. For more information, see “Setting up group notifications” on page 99.

Adding alternate approver information



From the Alternate Approvers tab of the People form, you can set up one or more people to approve change requests, release requests, purchase requisitions, and so on, that are pending your approval.

NOTE

You can configure alternate approvers only for yourself.

► To add alternate approver information for yourself

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.
The People form appears.
- 3 Search for yourself.
See “Searching for information” on page 40.
- 4 Select your record, and then click the Alternate Approvers tab.
- 5 Click Update Alternate Approvers.
The Alternate Approvers form appears.
- 6 To locate the alternate approver, click Search.
See “Searching for information” on page 40.
- 7 In the People Search form, select the alternate approver, and then click Select.
- 8 Select the start date and the end date.
- 9 In the Notify Alternate field, select whether to notify the alternate approver.
- 10 In the Covering field, select whether this will be an alternate for all approvals or only for a specific process.
- 11 If you selected Specific Process in the Covering field, select the applicable process in the Process field. For example, Major Account Level Approval.
- 12 Click Add.

Deleting people records

When employees permanently leave your company or move to another role within the company that does not involve using BMC Remedy ITSM Suite again, you can delete their People records from the system.

► To delete People records

- 1 Search for the People record and change its profile status to Delete.

— TIP

To set People records to Delete status, you need Contact Organization Admin, Contact People Admin, or BMC Remedy AR System Administrator permission

Figure 5-21 shows the Profile Status of a People record set to Delete.

Figure 5-21: Profile Status of People record set to Delete

The screenshot shows the 'People Information' form for a person with ID PPL000000000013. The 'Profile Status*' dropdown menu is highlighted with a red circle and set to 'Delete'. Other fields include Title (Mr.), First Name (Allen), Last Name (Allbrook), Client Type (Office-Based Employee), Job Title (Supervisor), and various other status options like Client Sensitivity (Standard), Support Staff (Yes), and Assignment Availability (Yes).

Person ID		PPL000000000013	
People Information			
Title	Mr.	Corporate ID	
First Name*	Allen	Profile Status*	Delete
Middle Name		Contact Type	
Last Name*+	Allbrook	Client Sensitivity*	Standard VIP* No
Client Type*	Office-Based Employee	Support Staff*	Yes
Job Title	Supervisor	Assignment Availability	Yes
Nickname			

General | More Details | Attributes | Work Info | Cls | Financials | Login/Access Details | Support Groups | Notifications | Alternate App

- 2 Save the record.
- 3 From the Actions menu, select Delete.

— TIP

You must have BMC Remedy AR System Administrator permission to actually delete the record.

6 Configuring product and operational catalogs

You can add products to the product catalog, information such as services to the operational catalog, and other information to the generic catalog for use in various IT Service Management (BMC Remedy ITSM) forms.

Products can be any items used by an organization and are usually IT-related. Products are typically used to classify a configuration item, an incident, a problem, or a change request.

The operational catalog can be used to contain a list of all the operational services that a typical help desk provides, and can also contain items that represent symptoms of incidents and problems.

Generic categories for miscellaneous information, such as reasons, can be used in the generic catalog.

The following topics are provided:

- Access point for the Product and Operational Catalog custom configuration (page 144)
- Working with product catalog information (page 145)
- Working with operational catalogs (page 157)
- Working with generic catalog information (page 161)

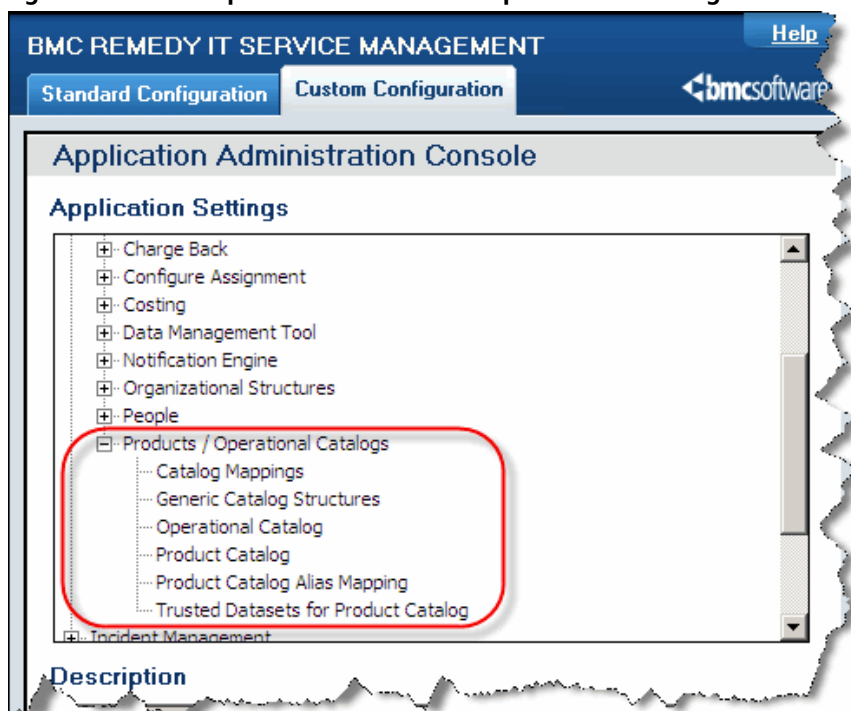
Access point for the Product and Operational Catalog custom configuration

The custom configuration for products and operational catalogs described in this section is accessed from the Foundation > Products / Operational Catalogs expandable command list on the Custom tab of the Application Administration Console as shown in Figure 6-1.

TIP

Carefully read the instructions for configuring product and operational catalogs in the rest of this section before using the configuration commands in the Foundation > Products / Operational Catalogs expandable list.

Figure 6-1: Access point for Product and Operational Catalog custom configuration



Working with product catalog information

This section describes what product catalog information is and what product catalog functions you can perform, such as:

- “What is product catalog information?”
- “Product categorization structure” on page 145
- “Creating product categories” on page 146
- “Relating a company or application to a product category” on page 148
- “Viewing and deleting categories” on page 150
- “Mapping catalogs” on page 150
- “Adding product aliases” on page 152
- “Adding product models and versions” on page 153
- “Modifying product information” on page 154
- “Setting product categories offline” on page 155
- “Mapping CI discovery categorization to product categorization” on page 155
- “Selecting trusted datasets for product catalogs” on page 156

What is product catalog information?

Product catalog information is used to create and maintain a database of products for a given company. Product catalog information is optionally configured with either Config Categorization or Config Categorization User permissions. For more information about permissions and roles, see Appendix A, “Permissions and functional roles.”

Product categorization structure

The Product Categorization structure is defined as Tier 1 > Tier 2 > Tier 3 > product name and manufacturer > model version, which is used to categorize different products or configuration items (CIs) in the Configuration Management Database (BMC Atrium CMDB) application. Product categorization can be associated with different processes for different companies. For more information about the BMC Atrium CMDB, see *BMC Atrium CMDB User's Guide*, *BMC Atrium CMDB Administrator's Guide*, and *BMC Atrium CMDB CDM Common Data Model Diagram*.

Creating product categories

Before creating or modifying product information, it is important to understand product relationships.

- When you are creating product category information:
 - The product name or manufacturer field is optional, but both are required if either is specified.
 - One tier can be sufficient, depending on the item being created.
 - If you create a product for which only one tier is required, the other two tiers must be set to None.
- Each product category can have more than one product model/version and more than one product alias.
- Products can be associated with one or more companies.
- A product is available for selection on other forms only after it has been associated with a company.
- After you relate a product to a company and an application, it can be used in forms that contain the product categorization fields.
- Each product model/version can have one or more patches.

► To add a product category

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Product Catalog, and then click Open.

The Product Catalog Setup form appears as shown in Figure 6-2.

Figure 6-2: Product Catalog Setup form

3 On the Product Category tab, click Create.

The Product Category Update form appears.

Figure 6-3: Product Category Update form

4 Optionally enter or select a Product Type.

- 5 Select the configuration item (CI) type. The CI Type field specifies the type of CI for which you are creating this product catalog.
- 6 Select or enter the Product Categorization Tiers. If you are creating a product that requires only one tier, enter None for the other two tiers.
- 7 Enter or select a product name.
- 8 If you specify a product name, specify a manufacturer. Select a manufacturer, or click New to add a manufacturer.

If you click New:

- a In the New Manufacturer dialog box, enter a company.
 - b In the Status field, select Enabled.
 - c Click Save.
- 9 In the Product Category Update dialog box, select Enabled for the status.

TIP

You can set the status to Proposed to temporarily prevent the category from being selected from an application.

- 10 In the Origin field, accept the default value of Custom. Third Party is used for products imported from an external source.
- 11 Select whether this definition is to be available across all applications in the BMC Remedy ITSM Suite.
- 12 Click Save.
You can use the search fields in the Product Categorization Search Criteria area at the top of the Product Catalog Setup form to view the added product.
- 13 To define the company and module relationships, complete the steps in the next section, "Relating a company or application to a product category".
- 14 Click Close.

Relating a company or application to a product category

Relationships between companies and applications or modules determine which companies, and BMC Remedy ITSM applications and modules, are enabled to accept product categorization information. A product can be associated with one or more companies.

NOTE

To make the product accessible to all companies, select Global for the company.

► **To relate a company and application or module to a product**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Product Catalog, and then click Open.

The Product Catalog Setup form appears as shown in Figure 6-2 on page 147.

- 3 Enter search criteria in the fields on the Product Categorization Search Criteria area of the form, and then click Search.
- 4 From the results list, select a product.

The relationships that appear in the Company/Module Relationships table are directly related to the product selected in the product table.

- 5 In the Company and Module Relationships area, click View or Create.

The Company/Module Relationship form appears as shown in Figure 6-4.

Figure 6-4: Company / Module Relationship form

The screenshot shows the 'Company / Module Relationship' form in the BMC Software interface. The form is titled 'Company / Module Relationship' and has a 'Help' button in the top right corner. It is divided into several sections:

- Select Company:** A dropdown menu showing '- Global -'.
- Select Status:** A dropdown menu showing 'Enabled'.
- Select Product Status Flags:** A section with radio buttons for 'Approved Product', 'Managed Product', and 'Hide Product', each with 'No' and 'Yes' options. It also includes a 'Product Life Cycle' dropdown set to 'Released', and 'Normalized Product' and 'Blacklisted Product' with 'No' and 'Yes' radio buttons.
- Select Application Modules:** A section with a 'Clear' button and a list of modules with checkboxes for 'Yes' or 'No'. The modules listed are: Incident Management, User Service Restoration, User Service Request, Infrastructure Restoration, Infrastructure Event, Problem Management, Configuration/Asset Management, Request Management, Change Management, and Work Order Management.

At the bottom of the form, there are 'Save' and 'Close' buttons.

- 6 In the Company field, select the company name to relate to the product.
- 7 Select the product status flags that apply to the product.
- 8 Select Yes for each BMC Remedy ITSM application and module that you want to enable for the product.

TIP

Click the check mark to the right of the Service Support Modules header to select all applications and modules.

- 9 Select the Status.

NOTE

A product status must be set to Enabled for it to appear in lists for product fields.

- 10 Click Save.

Viewing and deleting categories

You can also view and delete categories that have been created.

► To view or delete categories

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Product Catalog, and then click Open.

The Product Catalog Setup form appears.

- 3 Search for the product catalog that you want to view or delete by entering criteria in the Product Categorization Search Criteria fields at the top of the form and clicking Search.

TIP

When the Product Catalog Setup form is first displayed, all of the product categories in the system are listed in the Product Category list. If you do not know enough details to search for the product category that you want to view or delete, you can scroll through the list until you see it.

- 4 From the list of product categories displayed in the Product Category list, select the one you want to view or delete.
- 5 Click View or Delete.

If you clicked Delete, you are prompted to confirm that you want to delete the product category.

- 6 Click Close.

Mapping catalogs

Use this procedure to select which BMC Remedy ITSM applications and modules are used by an administration action. The Catalog Mapping form acts as a utility to manipulate mass data mappings for product catalog mappings. It should not be used as a primary way of mapping a product. Use the procedure in step 13 on page 148 in "Creating product categories" on page 146 as the primary method.

► To map a catalog

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Catalog Mappings, and then click Open.

The Catalog Mapping form appears in New mode as shown in Figure 6-5.

Figure 6-5: Catalog Mapping form

Status*	Company*	Admin Action*	Incid...	User...	User...	Infra...	Infra...	Probl...	Rt...
Enabled	- Global -	All Modules	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Enabled	- Global -	Asset							
Enabled	- Global -	Asset & Procurement							
Enabled	- Global -	Incident (All) & Problem	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Enabled	- Global -	Incident User Restoration	Yes	Yes					
Enabled	- Global -	Infrastructure Change							

Catalog Mapping CMP000000000001 (Modify)

BMC REMEDY IT SERVICE MANAGEMENT

Catalog Mapping

Catalog Mapping ID: CMP000000000001

Company*: Global - Admin Action*: All Modules

Select Application Modules

Clear

Incident Management	<input checked="" type="checkbox"/> Yes	Request Management	<input checked="" type="checkbox"/> Yes	Problem Management	<input checked="" type="checkbox"/> Yes
User Service Restoration	<input checked="" type="checkbox"/> Yes	Change Management	<input checked="" type="checkbox"/> Yes	Configuration/Asset Management	<input checked="" type="checkbox"/> Yes
User Service Request	<input checked="" type="checkbox"/> Yes	Change	<input checked="" type="checkbox"/> Yes	Purchase Requisition	<input checked="" type="checkbox"/> Yes
Infrastructure Restoration	<input checked="" type="checkbox"/> Yes	Task	<input checked="" type="checkbox"/> Yes		
Infrastructure Event	<input checked="" type="checkbox"/> Yes				

Submitter*: BMC SOFTWARE Submit Date: 4/7/2006 7:22:58 PM Status*: Proposed Enabled Offline Obsolete Archive Delete

Last Modified By: BMC SOFTWARE Last Modified Date: 4/7/2006 7:22:58 PM

Save Close

- 3 To change to Search mode, click the New Search toolbar icon on BMC Remedy User, or the Search button on the form in a browser.
- 4 In the Company field, select the company to map to administrative actions, and BMC Remedy ITSM applications and modules.
Optionally, you can select Global to map to all companies.
- 5 In the Admin Action field, select the administrative action to make available to the selected company and application modules.
- 6 In the Select Application Modules area, select the application and modules that this administrative action is to be configured to use.

- 7 Select a status.
- 8 Click Save, and then click Close.

Adding product aliases

A *product alias* is another term or abbreviation that you can use to reference a product. The product alias is used to search for a product in Product Name fields. For example, you might have a product with a long name such as Microsoft Product ABC 2005. You can create an alias such as ABC, and then users can enter this alias in a Product Name field to fill the remainder of the tiers.

A Product entry can have multiple Product Alias entries defined.

To create product aliases, you need either Config Categorization Admin or Config Categorization User permission.

TIP

Each time a product is created, an alias is automatically created. Use this procedure to create additional aliases for a product.

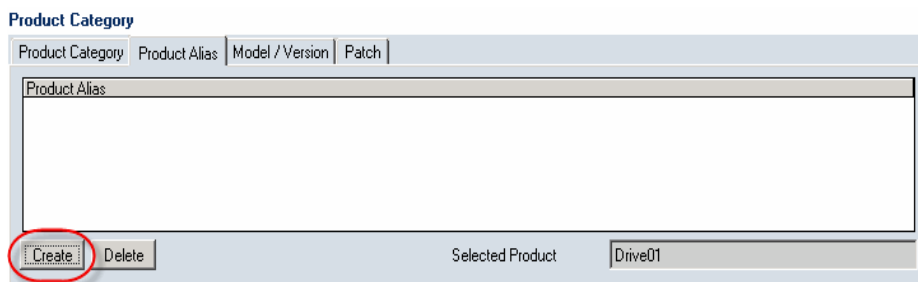
► **To add a product alias**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Product Catalog, and then click Open.

The Product Catalog Setup form appears.

- 3 Enter search criteria in the fields in the Product Categorization Search Criteria area of the form, and then click Search.
- 4 From the results list, select a product.
- 5 Click the Product Alias tab, and then click Create as shown in Figure 6-6.

Figure 6-6: Product Alias tab in the Product Catalog Setup form



The Update Product Alias dialog box appears.

- 6 Enter a Product Alias, and then click Save.

TIP

To modify a product alias, first delete by selecting it on the Product Alias tab and clicking Delete. Then add the product alias that you prefer.

Adding product models and versions

Product models and versions are used to differentiate between the various models or versions that are available for a given product in the product catalog. For each model and version, you can also specify patches.

To create product models and versions, you need either Config Categorization Admin or Config Categorization User permission.

► To add a model or version for a product

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Product Catalog, and then click Open.

The Product Catalog Setup form appears.

- 3 Enter search criteria in the fields on the Product Categorization Search Criteria area of the form, and then click Search to search for the product.
- 4 From the results list, select a product.
- 5 Click the Model/Version tab, and then click Create.

The Product Model/Version form appears.

Figure 6-7: Product Model/Version form

The screenshot shows the 'Product Model/Version' form in the BMC Software application. The form is titled 'Product Model/Version' and has a 'Help' button in the top right corner. The form contains several input fields and dropdown menus. The 'Product Model/Version' field is currently empty. The 'Product Model/Version State*' dropdown is set to 'Future Consideration'. The 'Requires Contract' field has radio buttons for 'Yes' and 'No', with 'No' selected. The 'GUID' field is currently set to 'Unknown'. The 'Operating System', 'Locale', 'Platform', 'Version Major', 'Version Minor', 'Version Build', 'Version Maintenance', and 'Manufacturer ID' fields are all empty. The 'Pre-Release Date+', 'General Avail. Date+', 'Discontinued Avail. Date+', and 'Discontinued Support Date+' fields have dropdown arrows. At the bottom of the form, there are 'Save' and 'Close' buttons.

- 6 In the Product Model/Version field, enter the model or version to add.

TIP

If you do not know the product model and version, click Unknown to dim this field.

- 7 Select the Product Model/Version State.
- 8 In the Requires Contract field, select Yes or No.
- 9 Enter any additional information, and then click Save.

The model or version for the selected product appears in the table on the Model/Version tab. You can create multiple models and versions for any product that exists in the product catalog.

TIP

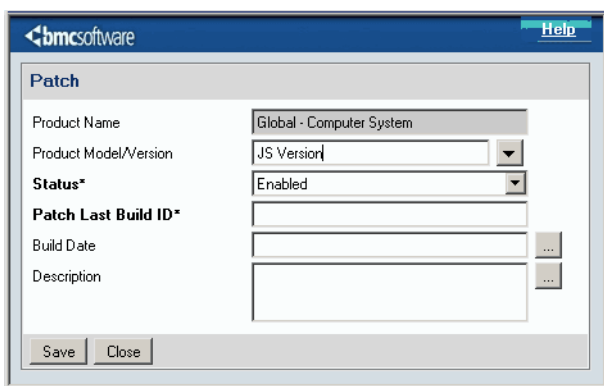
To view or delete product model and version information, see “Modifying product information” on page 154.

► To add patch information for a product model or version

- 1 On the Model/Version tab of the Product Catalog Setup form, select a product model or version.
- 2 Click the Patch tab, and then click Create.

The Patch dialog box appears.

Figure 6-8: Patch dialog box



- 3 Set the status to enabled.
- 4 In the Patch Last Build ID field, enter the patch build ID to add.
- 5 Optionally, enter a patch build date and description.
- 6 Click Save.

Modifying product information

You can modify the product status and product model/version information, and relate products to companies and applications or modules.

To modify product information, you need Config Categorization Admin or Config Categorization User permission.

► To modify product information

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Product Catalog, and then click Open.
The Product Catalog Setup form appears.
- 3 Enter search criteria in the fields on the Product Categorization Search Criteria area of the form, and then click Search.
- 4 Click the appropriate tab, and then click View.
- 5 Modify the information, and then click Save.

TIP

To delete product information, select the item to delete, and then click Delete. Only information about the selected tab is deleted.

Setting product categories offline

When you want a product category to be temporarily unavailable for use, you can set its status to offline.

► To set a product category to offline

Click the Set Offline button on the Product Catalog Setup form. To set the status back to online, click the Set Enabled button.

NOTE

A product status must be set to Enabled for it to appear in lists for product fields. When you set a product category offline, the status turns red. When you set it back online, the status turns green.

Mapping CI discovery categorization to product categorization

Product catalog alias mapping is used to map incoming CI categorizations from a discovery product to categorizations that you define in the Product Catalog Alias Mapping form. When a CI is saved, it will contain the mappings defined in the Product Catalog Alias Mapping form.

For example, if you specify *Desktop* in the Categorization Tier 1 field in the Discovery Product Categorization area and *Hardware* in the Categorization Tier 1 field in the Mapped Product Categorization area, any incoming CI that is received as Desktop for tier 1 will be saved as Hardware for tier 1.

► **To map CI discovery categorization to product categorization**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Product Catalog Alias Mapping, and then click Open.

The Product Catalog Alias Mapping form appears as shown in Figure 6-9.

Figure 6-9: Product Catalog Alias Mapping form

- 3 Select the CI type for the mapping.
- 4 In the Discovery Product Categorization and Mapped Product Categorization areas, select the information to be mapped for the selected CI type.
- 5 Click Save.

Selecting trusted datasets for product catalogs

Trusted datasets are used to select datasets for the product catalog when CIs are discovered that do not have categorization defined in the Product Catalog form.

For products coming from a dataset that has an entry in the Trusted Datasets form, the product categorization is created in the Product Catalog form and related to a global company. Then the CI is created.

For more information about the sandbox dataset, also referred to as an *overlay dataset*, see the *BMC Atrium Core Concepts and Planning Guide*.

NOTE

CIs are not created for products that are not in the Product Catalog form and that are coming from a dataset that is not defined in the Trusted Datasets form.

► To select trusted datasets

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Trusted Datasets for Product Catalog, and then click Open.

The Trusted Datasets form appears.

Figure 6-10: Trusted Datasets form

- 3 In the Dataset Name field, select a dataset.
The DatasetID field is automatically populated with the matching ID.
- 4 Click Save.

Working with operational catalogs

This section describes what operational catalog information is and what operational catalog functions you can perform, such as:

- “What is operational catalog information?”
- “Creating operational categories” on page 158
- “Relating a company or application to an operational category” on page 160
- “Setting an operational category to offline” on page 161

What is operational catalog information?

Operational categorization information is used for assignment mappings and categorizing incidents, problems, changes, and so on for reporting. The operational catalog can contain a list of the operational services that a typical help desk provides, such as adding hardware and password resets. It can also contain items that represent symptoms of incidents and problems.

You need Config Categorization Admin or Config Categorization User permission to create operational categories.

NOTE

Operational categories must be related to a company before they are available on BMC Remedy ITSM forms.

Creating operational categories

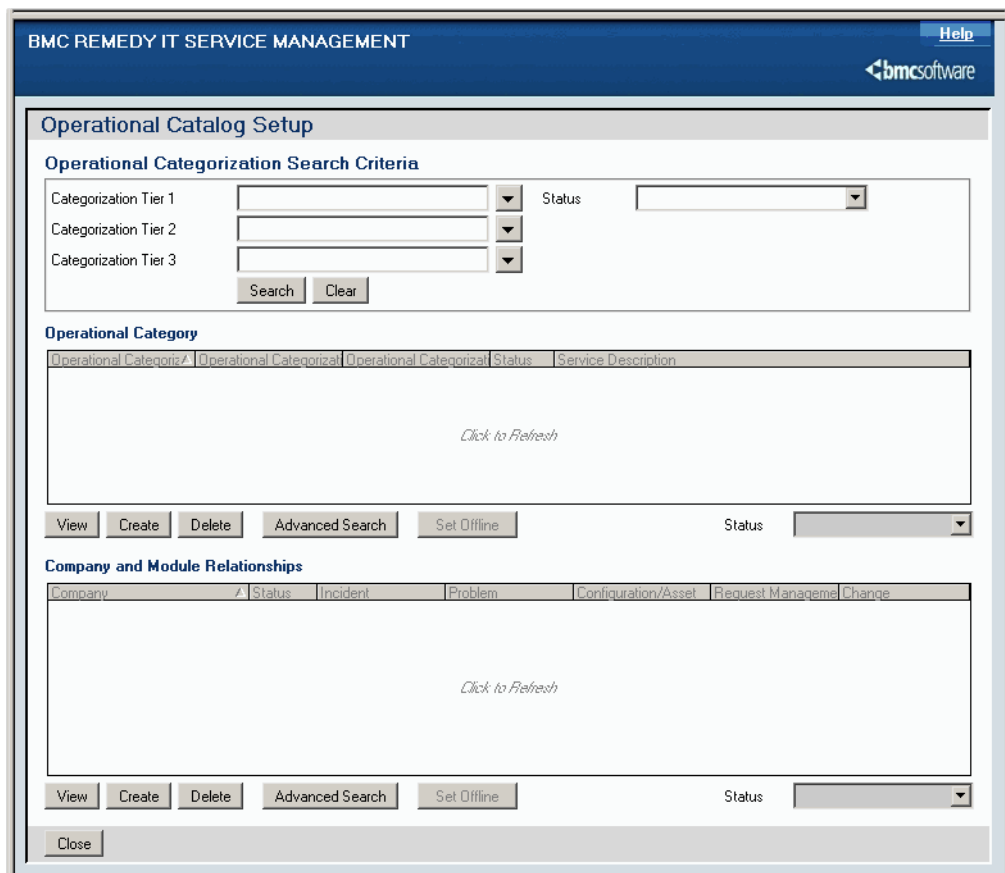
Operational categories are used in various BMC Remedy ITSM forms. Each operational category must be unique. You might find it helpful to view existing categories before creating new categories. See “Viewing and modifying standard configuration data” on page 68.

► **To add operational categories**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Operational Catalog, and then click Open.

The Operational Catalog Setup form appears as shown in Figure 6-11.

Figure 6-11: Operational Catalog Setup form



- 3 In the Operational Category area, click Create.

The Operational Catalog Update dialog box appears as shown in Figure 6-12.

Figure 6-12: Operational Catalog Update dialog box

- 4 Select or enter an operational categorization for the tiers.

TIP

If you only require only tier 1 categorization information for an operational category, you can enter None for the other tiers or you can leave them blank.

- 5 Select Enabled for the status.

NOTE

You can set the status to Proposed to temporarily prevent the category from being selected from an application.

- 6 Click Save, and then click Close.

You can use the search fields in the Operational Categorization Search Criteria area of the form to view the added operational category.

TIP

To modify an operational category, select it, and then click View. You can change the status and the operational description in the Operational Catalog Update dialog box. No other information can be changed. To delete an operational category, select it, and then click Delete.

- 7 To fill in the Company and Module Relationships area of the form, complete the steps in the next section, “Relating a company or application to an operational category” on page 160.
- 8 Click Close.

Relating a company or application to an operational category

Relationships between companies and applications or modules determine which companies, BMC Remedy ITSM applications, and modules can accept operational categorization information. An operational category can be associated with one or more companies.

► **To add a company, and application and module relationship for an operational category**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Operational Catalog, and then click Open.

The Operational Catalog Setup form appears.

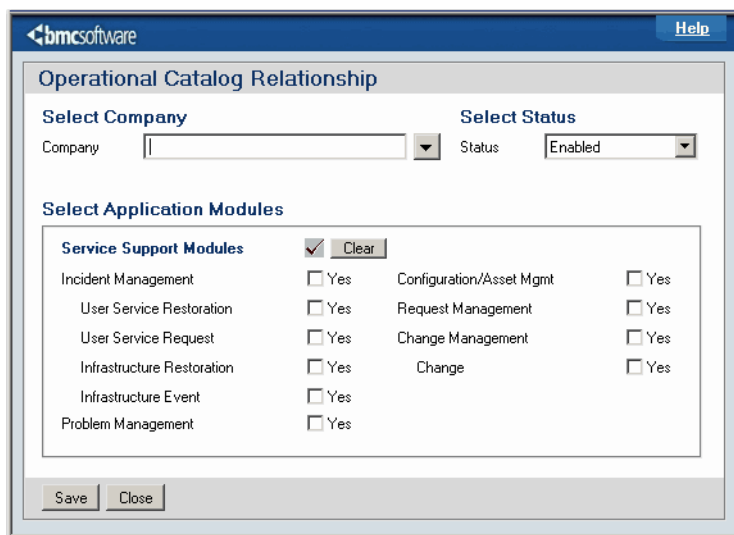
- 3 Enter search criteria in the fields on the Operational Categorization Search Criteria area of the form, and then click Search.

The relationships that appear in the Company and Module Relationships table are directly related to the selected category in the Operational Category table.

- 4 In the Company and Module Relationships area, click View or Create.

The Operational Catalog Relationship dialog box appears as shown in Figure 6-13.

Figure 6-13: Operational Catalog Relationship dialog box



- 5 By the default operational category is accessible to all companies. You cannot make them specific to certain companies.
- 6 Select Yes for each BMC Remedy ITSM application and module that you want to enable for the operational category.

TIP

Click the check mark to the right of the Service Support Modules header to select all applications and modules.

- 7 Select the Status.

NOTE

An operational category status must be set to Enabled for it to appear in lists for operational category fields.

- 8 Click Save.

Setting an operational category to offline

In the Company and Module Relationships area of the Operational Catalog Setup form shown in Figure 6-11 on page 158, select the operational category in the Operational Catalog Setup form, and then click Set Offline. This makes the category unavailable in selection lists. When an operational category is disabled, the Status field turns red.

TIP

To enable an offline category, select it, and then click Set Enabled. When an operational category is enabled, the Status field turns green.

Working with generic catalog information

This section describes what generic catalog information is and what generic catalog functions you can perform, such as:

- “What is generic catalog information?”
- “Creating a generic category” on page 162
- “Setting a generic category to offline” on page 165
- “Relating companies and modules to a generic category” on page 166

What is generic catalog information?

The generic catalog lets you create category type selections for fields in BMC Remedy ITSM applications, which vary based on the selection of either product or operational categorization. For example, you can create a list item called Hardware Failure for the Cause field on the Incident form, and make it available for selection only if the first tier of the product categorization is Hardware.

Several predefined category types are provided with the BMC Remedy ITSM Suite. For example, Reason category type is used in the list selections for the Cause field on the Incident form in BMC Remedy Incident Management and the Root Cause field on the Problem Investigations and Known Error forms in BMC Remedy Problem Management.

To create generic catalog information, you need to have Config Categorization Admin or Config Categorization User permission.

TIP

Generic catalog information must be related to a company to be available on BMC Remedy ITSM forms.

Creating a generic category

On the Generic Catalog Setup form, you must enter information in the Generic Product/Operational Relationship Category area first. Some of these categories can be associated with products and operational categories, some associated with just products, and others with just operational categories.

TIP

You must relate a category to a company before the category is available on other forms.

► To create a generic category

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Generic Catalog Structures, and then click Open.

The Generic Catalog Setup form appears.

- 3 In the Generic/Product/Operational Relationship Category area, click Create. The Generic Catalog Update form appears.

Figure 6-14: Generic Catalog Update form

- 4 Select the Category Type. The default category types available are listed in Table 4.

Table 6-1: Default category types

Selection	Meaning
Reason	Stores reason categories. The categories set up are then used as data on other BMC Remedy ITSM Suite forms. For example, Reason is used in the list selections for the Cause field on the Incident form in BMC Remedy Incident Management and the Root Cause field on the Problem Investigations and Known Error forms in BMC Remedy Problem Management.
Wallet	Used to store credit card information. The categories set up are then used as data on other BMC Remedy ITSM Suite forms. For example, on People records you can use the Attributes tab to add information for the Wallet Attribute Type.
Resolution Category	Used to categorize different types of resolutions. The categories set up are then used as data on other BMC Remedy ITSM Suite forms. For example, resolution category information is used in incidents.

Table 6-1: Default category types (continued)

Selection	Meaning
User Access ID	Stores user access catalog information. The categories set up are then used as data on other BMC Remedy ITSM Suite forms. For example, your site may have different types of user IDs for different purposes or systems. This category can be used to group them accordingly.
SLA Breach	Categorizes reasons for breaches of a Service Level Agreement (SLA). The categories set up are then used as data on other BMC Remedy ITSM Suite forms. For example, SLA breach category information is used in incidents.

- In the tier fields in the Generic area, enter categorization values. For example, in the Generic Categorization Tier 1 field for the Reason category type, select a value such as Hardware Failure.

NOTE

The Cause field is a single-tiered value. Therefore, when creating data for this category type, you need to provide only the first tier in the generic category definition. You can enter None for the tier 2 and tier 3 information or leave these fields blank.

- Optionally, you can relate the Generic Category definition to operational and product categorizations. Select the Operational and Product tiers.
The product and operational categorization values must exist in the product and operational catalogs. Also, you can create a generic category definition many times in the generic catalog if you need to relate it to various organizational or product categorization structures.
- Select a status.
- Click Save, and then click Close.

After you create generic category definitions, you can search for them to view in the Generic/Product/Operational Relationship Category table as shown in Figure 6-15.

Figure 6-15: Generic Catalog Setup form

Generic Catalog Setup

Generic Categorization Search Criteria

Generic Categorization

Category Type: Reason

Generic Categorization Tier 1: Hardware Failure

Generic Categorization Tier 2:

Generic Categorization Tier 3:

Product Categorization

Product Categorization Tier 1:

Product Categorization Tier 2:

Product Categorization Tier 3:

Product Name+:

Manufacturer:

Operational Categorization

Operational Categorization Tier 1:

Operational Categorization Tier 2:

Operational Categorization Tier 3:

Generic/Product/Service Relationship Category

Status	Category Type	Generic Categorization Tier 1	Generic Categorization Tier 2	Generic Categorization Tier 3
Enabled	Reason	Hardware Failure		

Buttons: Search, Clear, View, Create, Delete, Advanced Search, Set Offline

Status: Enabled

TIP

To modify a generic category, select it, and then click View. You can change the status on the Generic Catalog Update dialog box. No other generic categorization information can be changed. To delete a generic category, select it, and then click Delete.

- 9 Click Close.

Setting a generic category to offline

Select the generic category definition in the Generic Catalog Setup form, and then click Set Offline. This makes it unavailable in selection lists. To enable an offline category, select it, and then click Set Enabled. When a generic category is enabled, the status turns green; when it is disabled, the status turns red.

Relating companies and modules to a generic category

Relationships between companies and applications or modules determine which companies and BMC Remedy ITSM applications and modules can accept generic categorization information. A generic category can be associated with one or more companies.

TIP

To make the generic category accessible to all companies, select Global for the company.

► **To relate a company and application or module to a generic category**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Products/Operational Catalogs > Generic Catalog Structures, and then click Open.

The Generic Catalog Setup form appears.

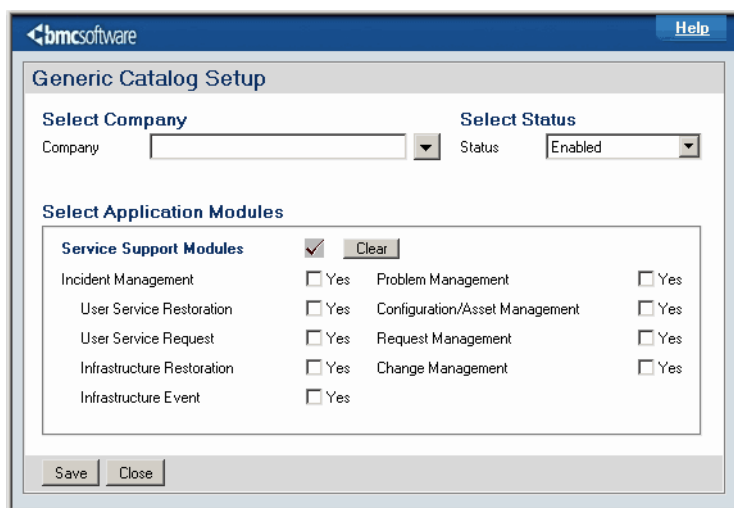
- 3 Enter search criteria in the fields on the Generic Categorization Search Criteria area of the form, and then click Search.
- 4 From the results list, select a category.

The relationships that appear in the Company and Module Relationships table are directly related to the category selected in the generic category table.

- 5 In the Company and Module Relationships area, click Create.

The Generic Catalog Setup form appears.

Figure 6-16: Generic Catalog Setup form



- 6 In the Company field, select the company name to relate to the generic category.

- 7 Select Yes for each BMC Remedy ITSM application and module that you want to enable for the generic category.

TIP

Click the check mark to the right of the Service Support Modules header to select all applications and modules.

- 8 Select the Status.

NOTE

A generic category status must be set to Enabled for the category to appear in lists for generic category fields.

- 9 Click Save.

Configuring notifications

Paging notification forms define how a pager is contacted.

The following topics are provided:

- Access point for the Notifications custom configuration (page 170)
- Customizing support staff notification preferences (page 171)
- Working with country codes (page 177)
- Working with numeric pager prefixes (page 178)
- Configuring pager service (page 180)

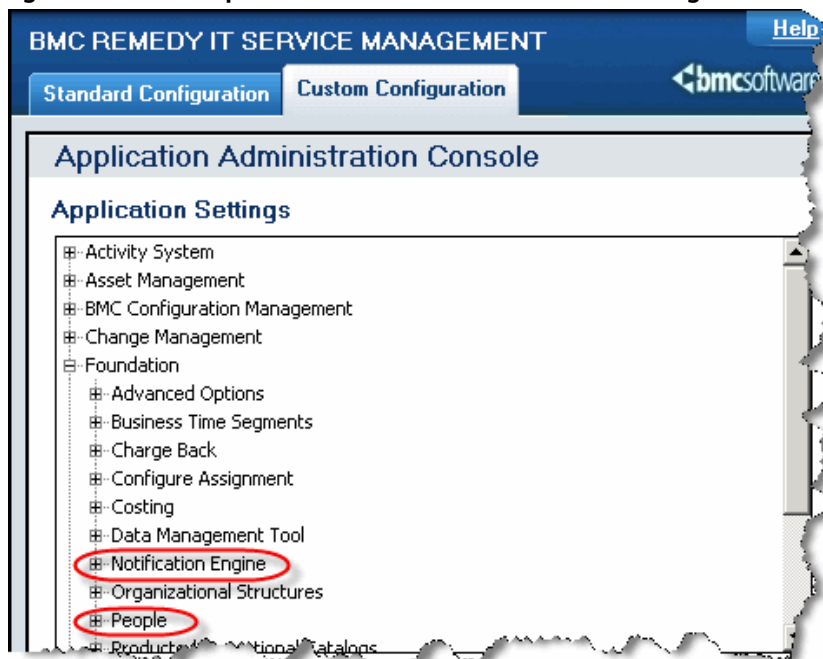
Access point for the Notifications custom configuration

The custom configuration for notifications described in this section is accessed from the Foundation > Notification Engine expandable command list on the Custom tab of the Application Administration Console as shown in Figure 7-1.

TIP

Carefully read the instructions for notifications in the rest of this section before using the configuration commands in the Foundation > Notification Engine expandable list and the People > People command.

Figure 7-1: Access point for the Notifications custom configuration



Customizing support staff notification preferences

You can customize an individual's notification preferences. Notification preferences vary by module, such as the BMC Remedy Asset Management and BMC Remedy Change Management applications, and by event, such as asset scheduled maintenance. Default notification preferences are predefined for each module and event. If the default settings meet your needs, you do not need to customize the preferences.

Paging notification forms define how a pager is contacted.

This sections describes the following procedures:

- “Changing notification availability and language” on page 171
- “Setting notification preferences” on page 172
- “Creating pager settings for support staff” on page 175
- “Setting up group notifications” on page 175

Changing notification availability and language

This section describes how to enable notifications for an individual and how to set the language in which notifications are to be delivered.

► To change notification availability and language

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

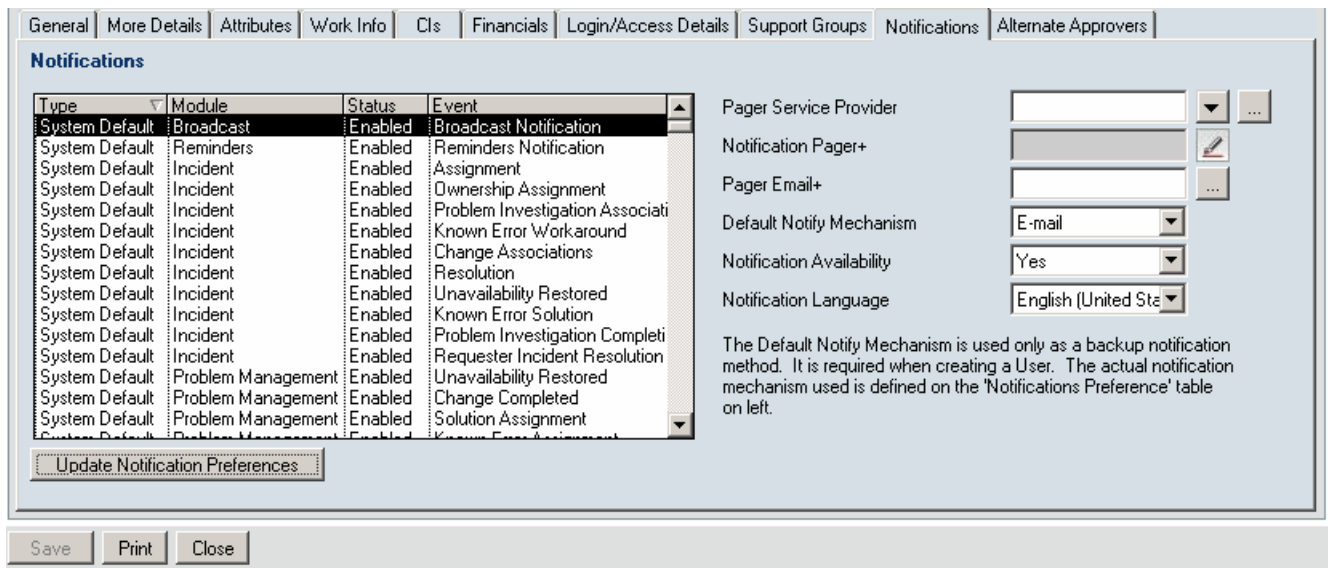
- 3 Search for the person.

See “Searching for information” on page 40.

- 4 Select the person, and then click the Notifications tab.

The system default notification preferences appear in the Notifications table.

Figure 7-2: Notifications tab in the People form



- **Notification Availability**—Select the appropriate value for the person.
- **Notification Language**—Select the language for the notifications received by the person. If this field is blank, English is used as the notification language.

TIP

The rest of the fields on this tab are used to configure pager preferences. See “Creating pager settings for support staff” on page 175 for more information.

- 5 Click Save.

Setting notification preferences

This section describes how to set notification preferences, which are defined on the Notifications tab of an individual’s people record.

► **To set notification preferences**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.

The People form appears.

- 3 Search for the person.
See “Searching for information” on page 40.
- 4 Select the person.

- 5 On the Notifications tab, shown in Figure 7-2, click Update Notification Preferences.

The Notification Preferences form appears as shown in Figure 7-3.

Figure 7-3: Notification Preferences form

Notification Preferences

Notification Event: Assignment | Help Text

Module Name: Incident | Status*: Enabled

Notification Event: Assignment | Pager Notification*: No

Priority: Medium | Use Business Hours*: Yes

Support Company: | Use Business Holidays*: Yes

Support Organization: | Individual Notifications*: Yes

Support Group Name: | Group Notifications*: Yes

Support Group Shift: | Notification Method*: Email

Note: Only 'User' notification types may be modified, set offline or deleted. 'System Default' types can NOT be altered in any way.

Add | Modify | Clear

Module	Notification T	Status	Notification Event	Timing	Priority	Notification Metho	Pager Notification
Incident	User	Enabled	Assignment		Medium	Email	No
Broadcast Reminders	System Default	Enabled	Broadcast Notification			Alert	No
Incident	System Default	Enabled	Reminders Notification			Alert	No
Incident	System Default	Enabled	Assignment			Alert	No
Incident	System Default	Enabled	Ownership Assignment			Alert	No
Incident	System Default	Enabled	Problem Investigation Associati			Alert	No
Incident	System Default	Enabled	Known Error Workaround			Alert	No
Incident	System Default	Enabled	Change Associations			Alert	No

Set Offline | Delete | Select a Mode | Create | View

Close

- 6 Click Create.

The fields in the Notification Preferences form are cleared.

Notification Preference entries are based on the information in the Module and Notification Event fields. You can use the support fields to further customize when a notification will be sent.

- 7 Select the module for which to customize a notification, such as BMC Remedy Asset Management or BMC Remedy Problem Management.
- 8 Select the Notification Event for the customization.

Notification events that are available vary based on the module you select.

- 9 You can optionally further classify this event by selecting information in the support fields.

For example, you can specify that assignment notifications be received for specific groups that the person is related to and not others.

- 10 Select a status.

- 11 Select Yes or No for the following required fields:

- a In the Pager Notification field, select Yes to receive pager notifications for the specified event and module.
- b In the Use Business Hours and Use Business Holidays fields, select Yes to use business hours and holidays for pager notifications.
- c In the Individual Notifications field, select No if you do not want to receive individual notifications about assignments for the selected event and module.
- d In the Group Notifications field, select No if you do not want to receive group notifications about assignments for your group for the specified event and module.
- e Select the notification method for the selected event and module.

TIP

A notification event can be used with pager notifications. For example, you can receive a pager notification and an email notification for a specified event and module.

- 12 Click Add to add this custom notification to the Notification Preferences table.

NOTE

Custom notification preferences appear in the Notification Preferences table with User as the Notification Type. System-defined notification preferences have System Default as the Notification Type. System Default notification preferences cannot be modified or removed from the list. Custom notification preferences take precedence over the system defaults when the application determines how to send notifications to a person.

- 13 To make modifications to a customized notification preference, select the preference and then click Modify. To delete a notification preference, select the item to delete, and then click Delete.

NOTE

Only fields on the right column of the Notification Event tab and for entries that have a Notification Type (column) of User can be modified.

- 14 To add more notification preferences, repeat step 6 through step 12 until you have finished.
- 15 Click Close.

Creating pager settings for support staff

You can specify pager settings on the Notifications tab of the People form. Pager notifications are used only as a backup notification method. Primary notification preferences are listed in the table on the left of the Notifications tab.

For information about setting up pager preferences, see “Configuring pager service” on page 180.

► To create pager settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, and then click Open.
The People form appears.
- 3 Search for the person.
See “Searching for information” on page 40.
- 4 Select the person, and then click the Notifications tab, as shown in Figure 7-2 on page 172.
- 5 Select a pager service provider.
- 6 To enter the person’s personal pager number, click in the Notification Pager field and press Enter.
The Phone details dialog box appears.
- 7 In the Phone details dialog box, enter the pager phone number, including the Personal Identification Number (PIN), if there is one, and then click OK.
- 8 On the People form, enter the pager email if the service provider offers paging using email.
- 9 In the Default Notify Mechanism field, optionally select the mechanism to use as the backup notification method.
- 10 Optionally, select the notification availability and notification language.
- 11 Click Save.

Setting up group notifications



By default, notifications are sent to individuals, and BMC Remedy ITSM Suite processes these one at a time. Using group notifications, you can configure the system to send notifications to a support group email list, instead of just to individuals within a group, which is the case when you set the Group Notifications field in the Notifications Preferences form. Setting this group notification option causes individuals within the group to be notified one at a time, which can degrade performance if more than 25 individuals are being notified. For more information about this field, see “Setting notification preferences” on page 172.

Group notification settings can also be set in other places within BMC Remedy ITSM Suite, such as the BMC Remedy Change Management and BMC Remedy Asset Management applications. This group email list functionality overrides all group notification settings within BMC Remedy ITSM Suite.

► **To set up group notifications**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Organizational Structure > Support Groups, and then click Open.
- 3 Select the support company, support organization, support group name, and support group role to which you want to apply group notifications.
- 4 Select the Group Notification Settings tab.

The Group Notification Settings tab is shown in Figure 7-4.

Figure 7-4: Group Notification Settings tab in the Support Groups form

- 5 Leave the Disable Group Notifications option set to No. If you select Yes, group notifications are disabled altogether.
- 6 In the Group Email box, enter a valid group distribution list. You can enter multiple distribution lists separated by a carriage return.
- 7 Select the language for the notification.

TIP

The language that you select here overrides the language that you select for the individual in the People form.

- 8 Click Save.

Working with country codes

The country code option maps area codes to system dialing codes so they can be used to forward generated notifications to pagers. You can set the dialing feature to use the country code, or you can define the dialing feature so that it does not use the country code for specified area codes.

► To create country codes

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Notification Engine > Country Code Option, and then click Open.

The Configure Country Code Option form appears as shown in Figure 7-5.

Figure 7-5: Configure Country Code Option form

The screenshot shows the 'Configure Country Code Option' form in the BMC Remedy IT Service Management interface. The form is titled 'Configure Country Code Option' and is part of the 'Foundation > Notification Engine' configuration. It contains the following fields and controls:

- Area Code***: Text input field containing '416'.
- Dial Using CC***: Dropdown menu set to 'Yes'.
- Status***: Dropdown menu set to 'Enabled'.
- Submitter***: Text input field with a search icon (three dots).
- Submit Date**: Text input field with a search icon (three dots).
- Last Modified By**: Text input field with a search icon (three dots).
- Last Modified Date**: Text input field with a search icon (three dots).
- Search** and **Close** buttons at the bottom left.

- 3 Enter an area code.
- 4 Select whether this area code should be dialed using country codes.
- 5 Set the status to Enabled.
- 6 Click Save.

► To modify or delete country code information

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Notification Engine > Country Code Option, and then click Open.
- 3 From the Country Code Option form, search for the country code that you want to modify or delete.

See “Searching for information” on page 40.

- 4 Select the country code from the list.

- 5 If you want to modify the country code, modify it and click Save.
- 6 If you want to delete the country code, select it and perform the following actions:
 - a Set the status to Delete.
 - b Click Save.
 - c If you are using BMC Remedy User, choose Actions > Delete.
 - d If you are using a browser, click Delete.

Working with numeric pager prefixes

The numeric pager prefix indicates the form from which the notification automatically originated.

► To create a numeric pager prefix

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Notification Engine > Numeric Pager Prefix, and then click Open.

The Configure Numeric Pager Prefix form appears as shown in Figure 7-6.

Figure 7-6: Configure Numeric Pager Prefix form

The screenshot shows the 'Configure Numeric Pager Prefix' form within the BMC Remedy IT Service Management interface. The form has a blue header with the BMC logo and a 'Help' button. The main content area contains several fields: 'Status*' is a dropdown menu currently set to 'Enabled'; 'Form Name*' is a text input field with a dropdown arrow and a '...' button; 'Numeric Page Prefix*' is a text input field. Below these is a table with two columns: 'Submitter*' and 'Last Modified By'. The 'Submitter*' row has a text input with 'Demo' and a '...' button, and a 'Submit Date' column with a date input and a '...' button. The 'Last Modified By' row has a text input and a 'Last Modified Date' column with a date input and a '...' button. At the bottom of the form are 'Save' and 'Close' buttons.

- 3 Select the Status.
- 4 Select the form name. For example, select the HPD:Help Desk form for BMC Remedy Incident Management.
- 5 In the Numeric Pager Prefix field, enter information to define the page, such as the number 11 to indicate that the page is related to an incident.

6 Click Save.

Users who are set up to receive application notifications on a numeric pager receive the prefix specified in the Numeric Page Prefix field if the notification is generated from the form that you specified. This prefix is sent only if the notification is generated automatically from the application. It is not used for manual pages from the form.

► **To modify or delete a numeric pager prefix**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Notification Engine > Numeric Pager Prefix, and then click Open.
- 3 From the Configure Numeric Pager Prefix form, search for the pager prefix you want to modify or delete.
See “Searching for information” on page 40.
- 4 Select the pager prefix from the list.
- 5 If you want to modify the pager prefix, modify it and click Save.
- 6 If you want to delete the pager prefix, select it and perform the following actions:
 - a Set the status to Delete.
 - b Click Save.
 - c If you are using BMC Remedy User, choose Actions > Delete.
 - d If you are using a browser, click Delete.

NOTE

You need ARS Admin permission to complete either of these actions.

Configuring pager service

You must define notification methods because different pager services have different notification methods. To complete this information accurately, see the documentation for the paging software that your organization uses.

► To configure a pager service

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Notification Engine > Pager Service, and then click Open.

The Pager Service Provider Configuration form appears as shown in Figure 7-7.

Figure 7-7: Pager Service Provider Configuration form

The screenshot shows the 'Pager Service Provider Configuration' form in the BMC Remedy IT Service Management interface. The form is titled 'Pager Service Provider Configuration' and includes the following fields and options:

- Status***: Enabled (dropdown menu)
- Pager Service Provider Menu***: PageMart (AlphaNumeric) (text field)
- Pager Service Provider***: PageMartSNPPTextPager (text field)
- Pager Parameter Requirements***: Radio buttons for Email, Pin, Phone (selected), and Pin and Phone.
- Pager Type***: Radio buttons for Alphanumeric (selected), Numeric, and Voice.
- Provider Web Page URL**: www.pagemart.com (text field)
- Run Process Command***: d:\telalert\Telalert -host 192.168.0.20 (text field)
- Pin Flag**: -pin (text field)
- Message Flag**: -m (text field)
- Provider Flag**: -c (text field)
- Phone Flag**: (empty text field)
- Email Flag**: (empty text field)
- Pager Email Suffix**: pagemart.com (text field)
- Optional Flag**: Demo (text field)
- Submitter***: JJ (text field)
- Last Modified By**: JJ (text field)
- Submit Date**: 3/20/2006 6:06:07 PM (text field)
- Last Modified Date**: 3/20/2006 6:20:05 PM (text field)

Buttons for 'Save' and 'Close' are located at the bottom left of the form.

- 3 To add an entry for the list on the Pager Service Provider field on the Notifications tab of the People form, do the following:
 - a Set the status to enabled.
 - b Enter the entry name in the Pager Service Provider Menu field.
 - c Enter the pager service provider.

The paging software that you use should have an entry for each of the providers that are created within this form. See the documentation provided by your paging software to determine how to set up the pager provider parameters.

- d Select the pager parameter requirements.
- e Set the pager type.
- f The Run Process Command field is used to pass information to the paging software. The Run Process Command field and flag fields are used to build a statement. An example command is:

```
d:\telalert\telalrtc -host 192.168.0.20 -pin <pagerPinNumber>
-m "This is the message" -c PageMartSNPPTextPager.
```

In this example, `-host 192.168.0.20` specifies the host IP address of the paging server. The information after each flag is passed by the notification engine to the paging software.

- g Enter the paging flags and the pager email suffix.
Each paging software application requires different flags, such as Pin, Provider, and Message. Usually, Pin is `-pin`, Provider is `-c`, and Messages are `-m`.
- h Copy the paging software client to your BMC Remedy AR System server so that the run process command can be executed. A symbolically linked directory can also handle this.

► To modify or delete a pager service

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Notification Engine > Pager Service, and then click Open.
- 3 From the Pager Service Provider Configuration form, search for the pager service you want to modify or delete.
See "Searching for information" on page 40.
- 4 Select the pager service from the list.
- 5 If you want to modify the pager service, modify it and click Save.
- 6 If you want to delete the pager service, select it and perform the following actions:
 - a Set the status to Delete.
 - b Click Save.
 - c If you are using BMC Remedy User, choose Actions > Delete.
 - d If you are using a browser, click Delete.

8

Configuring additional Foundation options

This section describes how to configure additional features in the Foundation portion of the BMC Remedy IT Service Management Suite (BMC Remedy ITSM Suite).

The following topics are provided:

- Access point for the additional Foundation custom configuration options (page 184)
- Registering time segments (page 185)
- Tracking costs (page 185)
- Working with cost centers (page 187)
- Working with finance rules (page 191)
- Working with cost rates (page 193)
- Configuring charge-back periods (page 197)
- Configuring assignments (page 198)

Access point for the additional Foundation custom configuration options

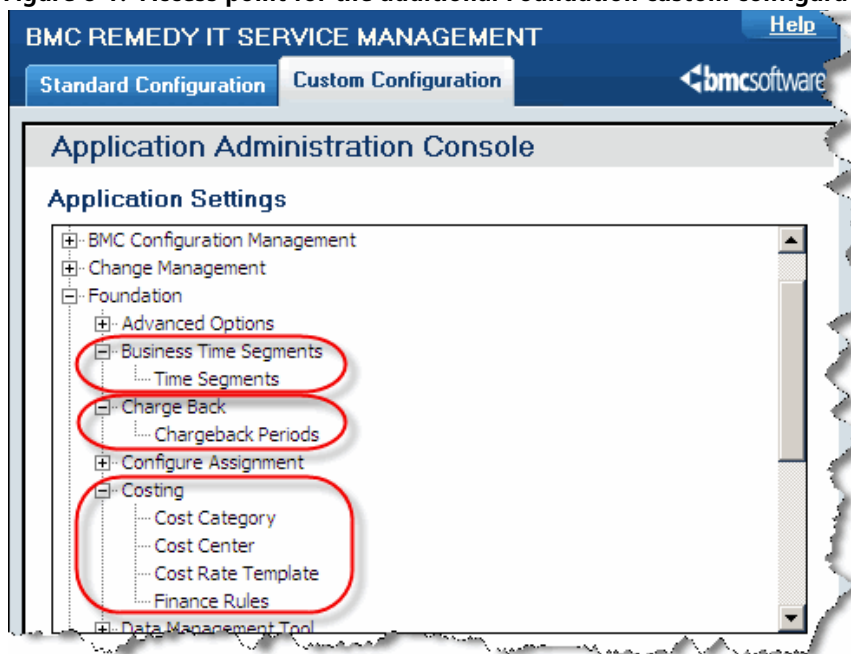
The custom configuration for additional Foundation options described in this section is accessed from the following expandable command lists on the Custom tab of the Application Administration Console as shown in Figure 8-1.

- Foundation > Business Time Segments
- Foundation > Charge Back
- Foundation > Costing

TIP

Carefully read the instructions for additional foundation options in the rest of this section before using the configuration commands in these expandable lists.

Figure 8-1: Access point for the additional Foundation custom configuration



Registering time segments

Registering time segments works like a calendaring system. For example, if you schedule a meeting in a certain conference room, nobody else can reserve the conference room at the same time. Similarly, you can block out time segments around business events (like company holidays), categorization, or configuration items (CIs). For example, an available time segment could specify that a CI is available for use, while an unavailable time segment could be used to represent a scheduled or planned maintenance window.

For more information, see the *BMC Remedy Action Request System Configuration Guide*, and the *BMC Remedy Change Management User's Guide*.

Tracking costs

The costing feature of BMC Remedy ITSM enables your organization to track costs and to understand the financial impact of changes on expenses.

What is cost categorization?

You use cost categorization to create categories that can be specified on costs.

For BMC Remedy Asset Management application, this task adds custom cost types and classes to lists for corresponding fields in Cost records and to the cost table on the Financials tab on BMC Remedy Asset Management forms.

For the other BMC Remedy ITSM applications, this task adds cost types to lists for corresponding fields in Costs records and to the cost table.

The unique cost category and cost type combinations you define using this task are available to their respective applications when costs are created.

► To create a cost category

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Category, and then click Open.

The Configure Cost Categorization form appears.

- 3 Click the New Request toolbar icon in BMC Remedy User or the New button in a browser to create a cost category.

TIP

You can also create a cost category from an existing one. First enter your search criteria in the Configure Cost Categorization form and click Search. Select the cost category that you want to modify to create the new category.

- 4 In the Company field, select a company, or select Global to apply the cost category to all companies.
- 5 In the Cost Category field, enter the custom cost category that you want to add.
- 6 In the Cost Type field, enter or select a type for the cost category.
- 7 In the Cost Type Key field, enter the cost type key.

IMPORTANT

The Cost Type Key field is the system name for the cost type and should not be changed. The Cost Type value can change based on different languages, but the value in the Cost Type Key field should remain the same because workflow uses the key values rather than the display values.

- 8 Select a status for the cost category and type.
- 9 In the Cost Class field, select a class for the cost category and type.

NOTE

This field is used only by the BMC Remedy Asset Management application.

- **Lease** generates a cost entry from a lease contract if assets or components are related to the contract.
 - **Maintenance** generates a cost entry from a maintenance contract if assets or components are related to the contract.
 - **Purchase Price** determines whether the depreciation cost is used in charge-back for the cost entry of this cost class.
 - **Software License** generates a cost entry from a software lease contract if assets or components are related to the contract.
 - **Support** generates a cost entry from a support contract if assets or components are related to the contract.
 - **Warranty** generates a cost entry from a warranty contract if assets or components are related to the contract.
 - **Other** specifies that no cost entry is created.
- 10 In the Cost Description field, enter a description for the cost category and the cost type.
 - 11 Click Save.

Modifying and deleting cost categories

► To modify a cost category

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Category, and then click Open.

The Configure Cost Categorization form appears.

- 3 Search for the cost category to modify.
See “Searching for information” on page 40
- 4 Select the cost category, and then modify any information.
- 5 Click Save.

► To delete a cost category

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Category, and then click Open.

The Configure Cost Categorization form appears.

- 3 Select the cost category from the list displayed.
- 4 Select Inactive for the Status, and click Save.
- 5 Do one of the following, depending on whether you are in BMC Remedy User or a browser:
 - In BMC Remedy User, choose Actions > Delete.
 - In a browser, click the Delete button below the results list.

Working with cost centers

This section describes:

- “What are cost centers?” on page 187
- “Adding cost centers” on page 189
- “Adding target cost centers” on page 190
- “Modifying cost centers” on page 190
- “Deleting cost centers” on page 191

What are cost centers?

Cost centers are used to identify which business units to charge costs to. Cost centers can be configured as a hierarchy to allow for cost allocation or the splitting of costs within cost centers. The cost center hierarchy is a source and target relationship (similar to a parent-child relationship where the source is the parent and the target is the child) between cost centers. The target and source relationship defines how the cost for the source cost center is split or allocated to the target cost centers. A source cost center with target cost centers is called a *split cost center*.

The source and target cost center relationship is limited to one level. A cost center can be either a source or a target cost center, but not both. You can optionally specify target cost centers for source cost centers, depending on the allocation method.

You must specify one of the following allocation methods for source cost centers:

- **None**—No allocation is needed, so no target cost centers are defined. This is the default allocation method.
- **Equal Distribution**—Costs are equally distributed to the target cost centers. You do not specify the distribution percentage for the target cost centers.
- **User-Defined Percentage**—You must specify the distribution percentage for each target cost center. The total distribution percentage among the target cost centers is not required to be 100 percent, but cannot exceed 100 percent.

When you create source cost centers and target cost centers, consider the following points:

- You cannot use the default cost center (“Unallocated”) as a target cost center.
- You cannot use obsolete cost centers as source cost centers or target cost centers.
- A target cost center can belong to only one source cost center.
- Source cost centers cannot be used as target cost centers. For example, a source center cannot be its own target cost center.

You can add target cost centers only after selecting the equal distribution or user-defined percentage allocation method. The allocation value is determined by a percentage from the source cost center. The percentage is stored in the Distribution Percentage field on the Cost Center form for a target cost center.

When the allocation method is Equal Distribution, the Distribution Percentage of the target cost centers is divided equally, based on 100 percent.

NOTE

Distribution percentages are recalculated when a target cost center is added or removed only if the source cost center and the target cost center have a status of Active.

For the allocation method of Equal Distribution, the Distribution Percentage is calculated by dividing 100 by the number of active target cost centers related to the active source cost center.

Adding cost centers

► To add a cost center

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Center, and then click Open.
- 3 On the Cost Center form, click the New Request toolbar icon in BMC Remedy User or the New button in a browser.

The Cost Center form is displayed as shown in Figure 8-2.

Figure 8-2: Cost Center form

The screenshot shows the 'Cost Center' form in the BMC Remedy IT Service Management interface. The form is divided into several sections:

- Cost Center Information:** Contains fields for 'Company*' (a dropdown menu), 'Cost Center Code*' (a text input), 'Status*' (a dropdown menu with 'Proposed' selected), 'Cost Center Name' (a text input), 'Description' (a text input with a search icon), and 'Allocation Method' (a dropdown menu with 'None' selected).
- Cost Center Owner:** Contains a 'Cost Center Owner+' text input field.
- Target Cost Centers:** A table with the following columns: 'Cost Center Code', 'Cost Center Name', 'Description', 'Status', and 'Distribution Percentage'. The table is currently empty and displays the message 'No Target Cost Center Found' and 'Click to Refresh'.
- Buttons:** At the bottom of the form, there are buttons for 'View', 'Add', 'Remove', 'Save', and 'Close'.

- 4 Select the company for which to add the cost center.
- 5 In the Cost Center Code field, enter a unique cost center code, such as SPLT-8200 for a split cost center, ENG-2000 for an engineering cost center, or MRT-3000 for a marketing cost center. This entry is added to lists for cost center fields.
- 6 Select a Status.
- 7 Enter information in the following optional fields:
 - a Enter a cost center name and a description.
 - b Enter the cost center owner, or press Enter to search for an owner.

TIP

You must save a new split cost center before you can specify an allocation method and add target cost centers for it.

- 8 Click Save.

To make this a split cost center, add target cost centers.

Adding target cost centers

► To add target cost centers

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Center, and then click Open.
- 3 On the Cost Center form, search for the cost center to which you want to add target cost centers.
See “Searching for information” on page 40.
- 4 From the list, select the source cost center to which to add target cost centers.
- 5 In the Allocation Method field, select Equal Distribution or User-Defined Percentage.
- 6 Click Add.
The Searching For Cost Centers dialog box appears.
- 7 Select search criteria, and then click Search.
- 8 Select the target cost centers, and then click Return Selected.
- 9 Click Save.
- 10 If you selected the User-Defined Percentage allocation method, you must specify the percentage for each target cost center:
 - a Select a target cost center.
 - b Click View.
 - c In the Distribution Percentage column of the Target Cost Centers table, enter the distribution percentage for the selected target cost center.
 - d Click Save.

Modifying cost centers

► To modify a cost center

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Center, and then click Open.
- 3 On the Cost Center form, enter search criteria, and then click Search.
- 4 In the results list at the top of the form, select the cost center to modify.

- 5 Modify the information, and then click Save.

NOTE

You cannot modify cost centers that have a status of Obsolete.

Deleting cost centers

► To delete a cost center

- 1 To remove a target cost center, select the target cost center in the Target Cost Centers table, and then click Remove.

This removes the relationship between the source cost center and the target cost center. The target cost center becomes a source cost center, and can be added as a target cost center for another source cost center.

TIP

You can delete only cost centers with a status of Proposed. You cannot delete the default cost center, Unallocated.

Working with finance rules

Finance rules specify which cost centers to use for automatic costs and the method used for automatically calculating costs.

► To create finance rules

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Finance Rules, and then click Open.

The Configure Finance Rules form is displayed as shown in Figure 8-3.

Figure 8-3: Configure Finance Rules form

The screenshot shows the 'Configure Finance Rules' form in the BMC Remedy IT Service Management interface. The form has a blue header with 'BMC REMEDY IT SERVICE MANAGEMENT' and a 'Help' button. The main content area is titled 'Configure Finance Rules' and contains several fields:

- Company***: A text input field with a dropdown arrow.
- Cost Category***: A dropdown menu.
- Cost Rate Template Use**: A dropdown menu with 'Product Category' selected.
- Actual Cost Calculated By**: A dropdown menu with 'Time In WIP' selected.
- Status***: A dropdown menu with 'Active' selected.
- Cost Center Code**: A text input field with a dropdown arrow.
- Cost Center Company**: A dropdown menu.
- Cost Center Name**: A text input field.
- Description***: A text input field with a search icon (three dots) to its right.

At the bottom of the form, there are two buttons: 'Save' and 'Close'.

- 3 Click the New Request toolbar icon in BMC Remedy User or the New button in a browser to create a finance rule.

TIP

You can also create a finance rule from an existing rule. First, click the search icon in the toolbar. Then, enter any search criteria and click Search. Select a finance rule on which to base the new finance rule.

- 4 In the Company field, select a company, or select Global to apply the finance rule to all companies.
- 5 In the Cost Category field, select a cost category for the finance rule. For example, select Training.
- 6 In the Cost Rate Template Use field, select whether to use product categories, organizational categories, or groups to match costs. For example, select Calbro Software.
- 7 In the Actual Cost Calculated By field, select one of the following items:
 - **Time in WIP** adds the actual effort cost log entries to calculate the actual cost.
 - **Start-Stop Clock** uses the value from the start/stop total time.
 - **Manually Entered** uses the value that is manually entered on the Finance tab of BMC Remedy ITSM forms.
- 8 Select a status and modify the description for the finance rule.

- 9 Optionally, select a cost center code for the finance rule.
For information about cost centers, see “Tracking costs” on page 185.
- 10 Click Save.

Working with cost rates

This section describes:

- “What is a cost rate?”
- “Defining cost rates by categories” on page 194
- “Defining cost rates by assignee group” on page 195

What is a cost rate?

You can configure cost rates in the following ways:

- By product category
- By product organizational category
- By assignee group

Costs defined by category can be related to change requests based on the request’s categorization. The configuration of costs can be based on time (hours or minutes) or a flat rate to complete the job.

Costs defined by group are also based on time or a flat rate, but instead of being associated with requests based on categorization, they are related to the group assigned to resolve the request.

Additionally, the costs associated with groups can be further defined by the location of the group. For example, a group that is based in a large city might have significantly higher operational costs (salaries, office space) than a group based in a small town.

NOTE

Only cost rates with the category or group specified in the Define By field in the Configure Cost Rate form matching the finance rule defined in the Configure Finance Rules form are checked when rates are matched.

Defining cost rates by categories

Cost rates can be defined to category or by assignee group. For more information about defining cost rates by assignee, see “Defining cost rates by assignee group” on page 195.

► **To define cost rates by category**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Rate Template, and then click Open.

The Configure Cost Rate form appears as shown in Figure 8-4.

Figure 8-4: Configure Cost Rate dialog box showing Product Category selected

The screenshot shows the 'Configure Cost Rate' dialog box with the following fields and values:

- Company***: Calbro Services
- Template Values**
 - Unit Rate***: 0.00 USD
 - Unit Type***: Flat Rate
 - Percentage Overhead**: 0.00 %
 - Status***: Proposed
 - Description**: (empty)
- Template Categorization**
 - Define By***: Product Category
 - Application**: (empty)
 - Product Tier 1***: (empty)
 - Product Tier 2**: (empty)
 - Product Tier 3**: (empty)

Buttons at the bottom: Save, Close.

- 3 To create a cost rate template, click the New Request toolbar icon in BMC Remedy User or the New button in a browser.
- 4 In the Company field, select a company, or select Global to apply the cost rate template to all companies.
- 5 Select the required unit rate, unit type, and status.

- 6 Optionally, enter the percentage overhead and a description for the cost rate template.

NOTE

Overhead is the additional cost above the standard cost rate. The percentage that you specify is added to the cost that is charged.

- 7 In the Define By field, select Product Category or Operational Category. The application and product or operational tier fields appear.
- 8 Select the application for the cost rate template.
- 9 To specify the categorization, select the product or operational tiers for this cost rate.
- 10 Click Save, and then click Close.

Defining cost rates by assignee group

Cost rates can be defined to assignee group or by category. For more information about defining cost rates by category, see “Defining cost rates by categories” on page 194.

► To define cost rates by assignee group

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Costing > Cost Rate Template, and then click Open.

The Configure Cost Rate form is displayed as shown in Figure 8-5.

Figure 8-5: Configure Cost Rate form showing Assignee Group selected

The screenshot shows the 'Configure Cost Rate' form in BMC Remedy IT Service Management. The form is titled 'Configure Cost Rate' and has a 'Help' button in the top right corner. The form is divided into several sections:

- Company***: A dropdown menu with 'Calbro Services' selected.
- Template Values**:
 - Unit Rate***: A text input field containing '0.00 USD' and a dropdown arrow.
 - Unit Type***: A dropdown menu with 'Flat Rate' selected.
 - Percentage Overhead**: A text input field containing '0.00' and a '%' symbol.
 - Status***: A dropdown menu with 'Proposed' selected.
 - Description**: A text input field with a dropdown arrow.
- Template Categorization**:
 - Define By***: A dropdown menu with 'Product Category' selected.
 - Application**: A dropdown menu.
 - Product Tier 1***: A dropdown menu.
 - Product Tier 2**: A dropdown menu.
 - Product Tier 3**: A dropdown menu.

At the bottom of the form, there are 'Save' and 'Close' buttons.

- 3 To create a cost rate template, click the New Request toolbar icon in BMC Remedy User or the New button in a browser.
- 4 In the Company field, select a company, or select Global to apply the cost rate template to all companies.
- 5 Select the required unit rate, unit type, and status.
- 6 Optionally, enter the percentage overhead and a description for the cost rate template.

NOTE

Overhead is the additional cost above the standard cost rate. The percentage that you specify is added to the cost that is charged.

- 7 In the Define By field, select Assignee Group.
The support organization, assigned group, and location fields appear.
- 8 Select the support organization for the cost rate template.
- 9 Select the assigned group.

- 10 To specify the categorization:
 - a Select the Region.
 - b Optionally select the site group and site.
- 11 Click Save, and then click Close.

Configuring charge-back periods

Charge-back time periods are used to specify the time period for charge-back of asset costs to cost centers or business organizations. Past time periods cannot be changed.

► To configure charge-back time periods

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Charge Back > Chargeback Periods, and then click Open.

The Configure Charge-back Time Periods form appears as shown in Figure 8-6.

Figure 8-6: Configure Charge-back Time Periods form

- 3 To create a cost rate template, click the New Request toolbar icon in BMC Remedy User or the New button in a browser.
- 4 In the Company field, select a company, or select Global to apply the cost rate template to all companies.
- 5 In the Time Period Type field, select a time period or Manual. For example, monthly.
- 6 If you selected Manual, specify the dates in the Period Start Date and Period End Date fields.

- 7 Click Save, and then click Close.

TIP

When you first install BMC Remedy ITSM, you can use this procedure to configure charge-back periods that match your organization's quarterly schedule. For example, if you install BMC Remedy ITSM in the middle of April and your organization's quarter runs from February to April, you can set BMC Remedy ITSM to match that quarterly schedule. First, set the Time Period Type field to Manual and enter an end date that coincides with the end of your organization's current quarter. After that time period is over, close the current period, and then open a new period that is set to Quarterly. You need to do this only when you first set up charge-back periods at your organization.

Configuring assignments

Assignment is based on organization, location, service, and product categorization. Assignments are also associated with the application in which they are used. An assignment can be broadly or narrowly defined, and can apply to all or only specific BMC Remedy ITSM applications.

IMPORTANT

Configure BMC Remedy ITSM Suite assignments solely from the Application Administration Console. Do *not* configure BMC Remedy ITSM Suite assignments from either the BMC Remedy Assignment Engine Console or from "back-end" forms, because this will cause problems.

This section describes:

- "Group assignment" on page 198
- "Working with auto-assignment" on page 200
- "Creating assignment routing in a custom configuration" on page 200
- "Assignment events" on page 201
- "Automatic assignment to individuals" on page 202

Group assignment

The first step in creating assignment information is configuring a group assignment. You can then use predefined assignment information for automatic assignment to an individual in the assigned group by using the BMC Remedy Assignment Engine, if needed. Advanced administrators can also define custom individual assignment information for the BMC Remedy Assignment Engine. For more information about the Assignment Engine, see the *BMC Remedy Task Management System Administrator's Guide*.

► Creating a group assignment

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Configure Assignment > Configure Application Assignment, and then click Open.

The Configure Assignment form is displayed as shown in Figure 8-7.

Figure 8-7: Configure Assignment form

BMC REMEDY IT SERVICE MANAGEMENT Help

Configure Assignment

Group Assignment

Event Details

Event*

Description

Status* Sort Order

Assignment

Support Company*+

Support Organization*

Assigned Group*

Support Group ID*

Routing Order

Order 1 - Organization

Contact Company*+

Organization

Department

Order 2 - Location

Company*+

Region

Site Group

Site+

Order 3 - Operational Categorization

Tier 1

Tier 2

Tier 3

Order 4 - Product Categorization

Tier 1

Tier 2

Tier 3

Name

Available Systems

Systems Supported

Incident Management Yes

User Service Restoration Yes

User Service Request Yes

Infrastructure Restoration Yes

Infrastructure Event Yes

Problem Management Yes

Configuration/Asset Management Yes

Change Management Yes

Purchase Requisition Yes

Work Order Management Yes

- 3 To change the form to New mode, click the New Request toolbar icon in BMC Remedy User or the New Request button on the form in a browser.
- 4 In the Event field, select the type of assignment entry.
- 5 Select a status for the assignment.
For an active assignment, the status should be Enabled.
- 6 Optionally, you can select a sort order.
This can be a positive or negative number. The assignment is placed in order, based on the number selected.
- 7 In the Assignment area, select the support company, support organization, assigned group and support group ID to use for assignment.

- 8 In the Routing Order area, as an advanced feature you can further specify when this assignment entry should be used for the automated assignment.

The Contact Company and Company fields are required.

You can map the Assignment entry using the following data structures:

- Organization
- Location
- Operational Categorization

NOTE

Operational Categorization is not used in the BMC Remedy Asset Management application.

- Product Categorization

When a BMC Remedy ITSM application uses the routing order, which is a feature of many of the main ticketing forms, it uses information from the form to find an assignment entry and, in turn, the support group for assignment.

- 9 In the Available Systems area, select the BMC Remedy ITSM applications and modules to which to apply the assignment entry. For example, you can create an assignment entry that applies only to the BMC Remedy Incident Management application. This enables you to select different support groups for assignment, even if the mapping selections are the same.
- 10 Click Save.

Working with auto-assignment

Using the Group Assignment form, you can automatically assign an issue or request to a group. Using the BMC Remedy Assignment Engine application, which is packaged with BMC Remedy ITSM, you can define criteria to automatically assign an issue to a specific individual from the available people. For more information about

To remove an individual from auto-assignment, set the Assignment Availability field on the People record to No as described in “Creating a people template” on page 109 and “Adding a support staff person” on page 117.

Creating assignment routing in a custom configuration

Configure assignment routing so that the system automatically assigns records, such as investigations or change requests, to the appropriate support group. When a BMC Remedy ITSM application uses the routing order, it uses information from the form that it is on to find an assignment record and to select the support group for assignment.

For more information about how to configure assignment routing, see “Creating assignment routing in a standard configuration (optional)” on page 66.

Assignment events

Table 8-1 describes the assignment events.

Table 8-1: Assignment events

Event	Available systems	Form assignment	Description
- General -	BMC Remedy Change Management application	Infrastructure Change	Used to assign a change request to the change implementer.
- General -	BMC Remedy Incident Management application <ul style="list-style-type: none"> ■ User Service Restoration ■ User Service Request ■ Infrastructure Restoration ■ Infrastructure Event 	Incident	Used to assign an incident for resolution.
- General -	BMC Remedy Problem Management application	Known Error	Used to assign a known error assignee to maintain the accuracy of the known error information.
- General -	BMC Remedy Problem Management application	Problem Investigation	Used to assign a problem assignee to investigate the problem.
- General -	BMC Remedy Problem Management application	Solution Database	Used to assign a solution entry to the solution assignee for completeness and verification.
- General -	Purchase Requisition	Purchase Requisition	Used to assign a purchase requisition.
Incident Owner	BMC Remedy Incident Management application <ul style="list-style-type: none"> ■ User Service Restoration ■ User Service Request ■ Infrastructure Restoration ■ Infrastructure Event 	Incident	Used to assign an incident owner for an incident.
Infrastructure Change Assignee	BMC Remedy Change Management application	Infrastructure Change	Used to assign a change assignee for an infrastructure change.
Infrastructure Change Manager	BMC Remedy Change Management application	Infrastructure Change	Used to assign a change manager for an infrastructure change.
Problem - Manager	BMC Remedy Problem Management application	Known Error	Used to assign a problem manager to a known error.
Problem - Manager	BMC Remedy Problem Management application	Problem Investigation	Used to assign a problem manager to a problem investigation.
Solution Manager	BMC Remedy Problem Management application	Solution	Used to assign a solution database entry.

Table 8-1: Assignment events (Continued)

Event	Available systems	Form assignment	Description
Task Assignee	Task Management System	Task	Used to assign a task to the task implementer.
Unavailability Assignment	BMC Remedy Asset Management application	Unavailability Update	Used to define CI unavailability.
Activity Assignee	BMC Remedy Release Management module	Activity	Used to assign an activity assignee for an activity.
Release Manager	BMC Remedy Release Management module	Release	Used to assign a release manager for a release request.

Automatic assignment to individuals

In addition to configuring group assignment, you can use the predefined assignment processes provided with BMC Remedy ITSM that use the BMC Remedy Assignment Engine for automatic assignment to individuals. Advanced administrators can also define custom individual assignment information for the BMC Remedy Assignment Engine.

For more information about configuring the BMC Remedy Assignment Engine for assignment to individuals, see the *BMC Remedy Action Request System Configuration Guide*.

9 Configuring advanced options

This section describes how to configure the advanced options that are available in the foundation application of BMC Remedy IT Service Management Suite (BMC Remedy ITSM Suite).

The following topics are provided:

- Access point for the Advanced Foundation custom configuration options (page 204)
- Command automation interface (page 205)
- System configuration settings (page 216)
- Configuring Web Services (page 219)
- Configuring views (page 222)

Access point for the Advanced Foundation custom configuration options

The custom configuration for advanced foundation options described in this section is accessed from the Foundation > Advanced Options expandable command list on the Custom tab of the Application Administration Console as shown in Figure 9-1.

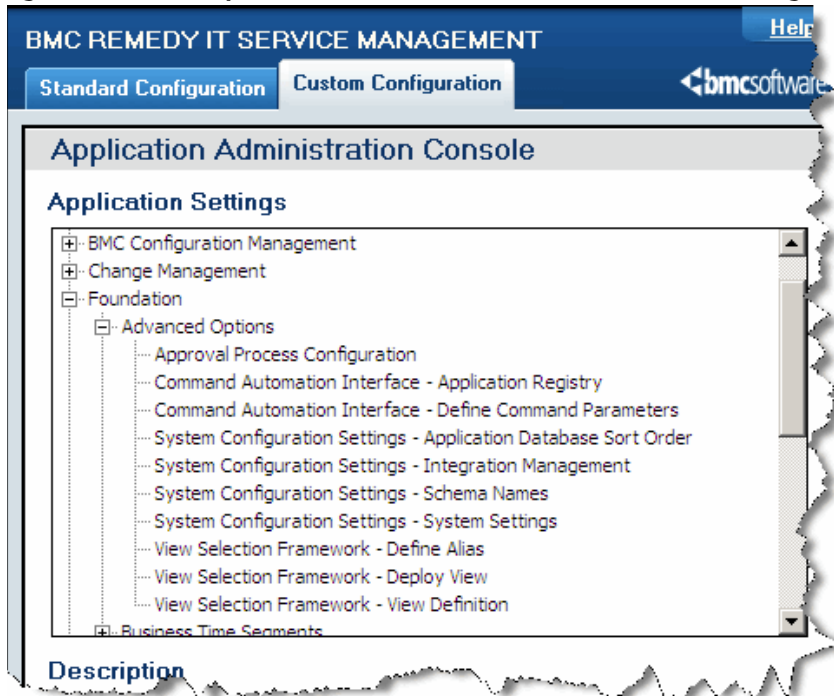
TIP

Carefully read the instructions for advanced foundation options in the rest of this section before using the configuration commands in the Foundation > Advanced Options expandable list.

NOTE

The Schema Names feature is used to enable the BMC Remedy Distributed Server Option for BMC Remedy ITSM. For information, see the *BMC Remedy Action Request System BMC Remedy Distributed Server Option Guide* guide.

Figure 9-1: Access point for the advanced Foundation custom configuration



Command automation interface

The Command Automation Interface (CAI) is a subcomponent that enables you to register applications and create commands for integration with back-office applications. Using a command definition (a type of template) to construct commands by using the parameters sent to it by BMC Remedy ITSM Suite, CAI uses a predefined conduit (for example, a web service, a command line, a URL, and so on) to execute these commands on the external systems. For example, BMC Remedy Change Management uses CAI to communicate with the Task Management System (TMS).

NOTE

For detailed information on using the CAI to register your own back-office applications, see the *Integrating Service Request Management with Third-Party Applications White Paper*.

This section describes:

- “Registering the back-office application in the SHARE:Application_Properties form” on page 205
- “Registering the application with the CAI” on page 207
- “Defining command parameters” on page 210
- “Defining mappings” on page 214

Registering the back-office application in the SHARE:Application_Properties form

Application registration defines the integration attributes (for example, application name, integration form, form fields, and connection information) to communicate with the external application. This stage in the CAI definition phase defines the application in the CAI subsystem and how CAI communicates with the back-office. Applications registered with the CAI (for example, BMC Remedy Change Management or the Work Order Management application) must have an entry in the SHARE:Application_Properties. This stage enables several configuration menus in the CAI to have the proper form name. You must register back-office fulfillment applications with the CAI so that the back-office application can be recognized.

By creating an entry in the SHARE:Application_Properties form, you are allowing the back-office application to be registered with the CAI. In addition, this form is used by other configuration menus.

► **To allow the application to be registered**

- 1 In BMC Remedy User, log in to the server as the Demo user (or with the appropriate permissions needed to view the SHARE:Application_Properties form).
- 2 Open the SHARE:Application_Properties form in New Mode.

NOTE

This form is not available from the Application Administration console, and you must open the form directly.

- 3 Enter the appropriate values into the form to create a Name record, for example:

Table 9-1: Creating Name property in the SHARE:Application_Properties form

Field	What you enter
Application ID	Enter a unique ID for the application that you are registering.
Property Name	Name
Property Value	Enter a unique property value for the application that you are registering.
Instance ID	None. (The value is auto-populated when you submit the record.)
Status	Active

- 4 Save the record.
- 5 Enter the appropriate values into the form to create a Version record, for example:

Table 9-2: Creating Version property in the SHARE:Application_Properties form

Field	What you enter
Application ID	Enter a unique version ID for the application that you are registering.
Property Name	Version
Property Value	Enter a unique version property value for the application that you are registering.
Instance ID	None. (The value is auto-populated when you submit the record.)
Status	Active

By creating these entries in the SHARE:Application_Properties form, you are allowing the Document Request application to be registered with the Command Automation Interface (CAI), which you will be doing in the next stage. In addition, this form is used by other configuration menus.

- 6 Save the record and close the form.

Registering the application with the CAI

The Application Registry form is used to register the applications that are used with TMS and to identify key elements of the back-office application, such as template forms, interface forms, and so on. Registering the application with the CAI in the Application Registry makes it available for selection when configuring CAI components, for example, the commands and the command parameters for each integrated component.

A registry entry is used by TMS to recognize the back end application, set the configuration settings such as mode of connection (local or remote), set server and template information, and set the context for the remainder of the TMS entities.

Use the Application Registry form to modify any of the preconfigured information or create new application registries if your organization is going to use TMS and other applications.

► To register an application

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Command Automation Interface - Application Registry, and then click Open.

The Application Registry form appears.

Figure 9-2: Application Registry form

3 Enter the following *required* information in the top pane:

Field Name	Description
Registry Name	Enter a unique name for the application that you are registering.
Description	Enter a description of the application that you are registering.
Status	Select a status for this entry.

4 On the General tab, enter the following information:

Field Name	Description
Application Name	Select the application that you are registering.
Template Form	Select the form that identifies the template. TMS needs to identify the templates to use for pushing requests and incidents. These templates should already exist in the back end application.
Template View Form	Select the form that is the front end or view form (the form that the back end application's user see) for the template form you selected. The view form should already exist in the back end application.
Instance Form	Enter the form that identifies the application instance. The application instance is the request entry that is created when the service request is submitted, based on the template, if a template is used. Some back end applications might choose not to use a template structure. The form identifier (or Template Form field) identifies the back end request form that is used to create the entry.
Interface Form	Designate the form identifier for TMS to interact with when initiating back end application requests. TMS pushes data into this form to initiate outbound commands.
New Request Activation	Select Yes to indicate that the request needs to be activated after submission; otherwise, select No.

- Click the Connection tab.

Figure 9-3: Application Registry form—Connection tab

The Connection tab is used to define login information and the type of protocol to use when integrating the registered application.

- Enter or modify the following information:

Field Name	Description
Access Mode	Specify whether the registered back end application is on a remote or local server. The local server is the server where TMS is installed.
Server	Enter the server name where the application you are registering is installed.
Protocol	Specify the communication format for data exchange. <ul style="list-style-type: none"> ■ AR ■ URL ■ Webservice ■ Command Line ■ Plug-in ■ Other
Login	Fill in this field if you set the Access Mode to Remote. Enter your login name to access the remote back end application used for requests.
Password	Fill in this field if you set the Access Mode to Remote. Enter your password to access the remote back end application used for requests.
Port #	Fill in this field if you set the Access Mode to Remote. Enter the port number of the remote back end application used for requests.

- Click Save.

Defining command parameters

After defining an entry in the Application Registry form, you must define the commands and command parameters.

As part of the CAI definition phase, command definition describes the commands and the command parameters for each integrated component. For example, you can create a set of commands for interaction (create, modify, and cancel operations) with the back-office application. In addition, CAI can include command parameter mappings to be registered for other applications.

The CAI subsystem provides an integration link with back-office applications that does not require you to add any custom workflow to complete the integration. You can include a Filter API to facilitate the communication with a BMC Remedy AR System back-office application.

The CAI uses Event Commands to facilitate this communication link. The CAI offers Event Commands that create requests, update them with status changes, and synchronize activity in them. The type of information being synchronized includes status updates and work log activities.

The communication link is bidirectional. Workflow can also be added to the back-office application to send status updates back to your application. The BMC Remedy Incident Management application, BMC Remedy Change Management application, and Work Orders provide this type of workflow by default. You can add similar workflow to your custom applications to complete similar updates.

► To define commands and command parameters

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Command Automation Interface - Define Command Parameters, and then click Open.

The Define Commands and Command Parameters form appears.

Figure 9-4: Define Commands and Command Parameters form

BMC REMEDY IT SERVICE MANAGEMENT - Command Automation Interface Help

bmcsoftware

Define Commands and Command Parameters

Command*

Command Parameters

Parameter	Description
http://<cms host:port>/shell/settings/general.do?cms_security_tic	Launch BMC Configuration Manager

Command Parameter Mappings

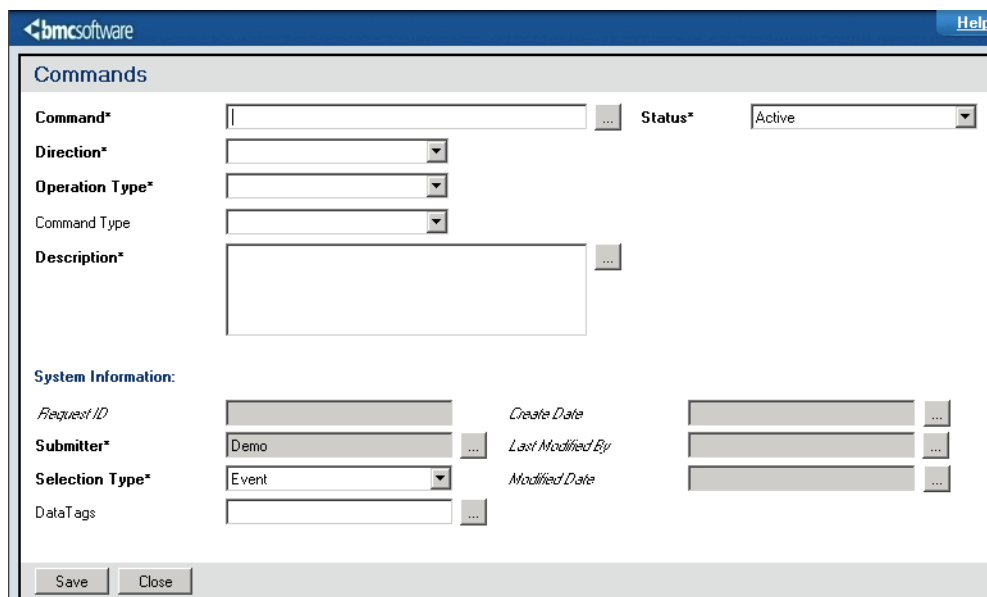
Application Name	Parameter	Form Name	Field Name	Field ID
BMC Configuration Manag	http://<cms host:port>/sh:TMS.Task	Token		301716400

TIP

Select an existing command and click View.

- 3 Click Create New Command.
The Commands form appears.

Figure 9-5: Commands form



- 4 Enter information in the fields:

Field Name	Description
Command	Enter a name for this command.
Direction	Select one of the following items: <ul style="list-style-type: none"> ■ Inbound—Inbound from the application to TMS. ■ Outbound—Outbound from TMS to the application.
Operation Type	Select one of the following items: <ul style="list-style-type: none"> ■ Create—Creates a new request. ■ Get—Gets information from a request. ■ Update—Updates a request.
Command Type	Optionally select one of the following items: <ul style="list-style-type: none"> ■ Append—Contains a series of commands followed by a series of parameters. ■ Interleave—Contains a series of alternating commands and parameters.
Description	Enter a description.
Selection Type	Select Event.
Status	Select a status.

- 5 Click Save.

► To pass parameters to a command

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Command Automation Interface - Define Command Parameters, and then click Open.

The Define Commands and Command Parameters form appears.

- 3 From the Command drop-down list, select the command that you created earlier and then click Create under the Command Parameters list.

The Command Parameters form appears as shown in Figure 9-6.

Figure 9-6: Command Parameters form

- 4 Enter information in the fields:

Field Name	Description
Command	Enter a name for this command.
Parameter	Enter the parameter to be passed to the command. The parameter must be entered without syntax errors because no checking is done.
Type	Select one of the following items: <ul style="list-style-type: none"> ■ In—Inbound from the application to TMS. ■ Out—Outbound from TMS to the application. ■ Qual—Qualifier.
Data Type	Select one of the following items: <ul style="list-style-type: none"> ■ Character—Passes the parameter as a character data type. ■ Attachment—Passes the parameter as an attachment. ■ O-Length Char—Passes the parameter as a zero length character.

Field Name	Description
Mode	Optionally, select one of the following modes: <ul style="list-style-type: none"> ■ Required—Indicates the parameter must be passed to the command whenever it is used. ■ Optional—Indicates the parameter does not have to be used whenever the command is used.
Status	Select a status.
Description	Optionally, enter a description.

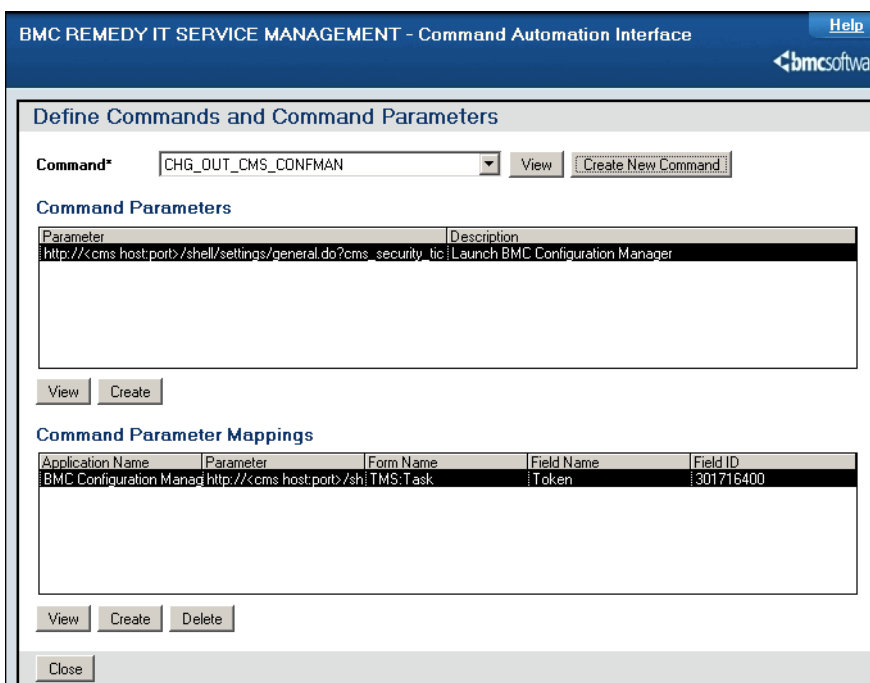
Defining mappings

Define mappings between the parameters defined on the Command Parameter form and the Interface Form that you specified on the Application Registry form (as described in “Registering the application with the CAI” on page 207).

► To define mappings

- 1 On the Define Commands and Command Parameters form, select the command to define mappings for.
- 2 Click the Create button below the Command Parameter Mappings table.

Figure 9-7: Define Commands and Command Parameters form



The Command Parameter Mappings form appears.

Figure 9-8: Command Parameter Mappings form

3 Enter information in the fields:

Field name or area	Description
App Registry Name	Select the application you registered on the Application Registry form. See “Registering the application with the CAI” on page 207.
Command	You can use the selected command or select a command that you defined.
Status	Select a status.
Parameter	Select a parameter that you defined for the selected command on the Command Parameters form.
Application Fields	Map to an appropriate field on the Application Registry form. <ul style="list-style-type: none"> ■ App Interface Form—This is TMS:Task. ■ Field Name—Select the field to which to map. ■ Field ID—The field ID is automatically filled in when you select a field name.
Data Tags	For internal use only.

4 Click Save.

System configuration settings

This section describes how to configure the following system settings:

- “Application database sort order” on page 216
- “System settings” on page 218.

Application database sort order

The Schema Sort form enables you to customize the sort order of BMC Remedy AR System forms for your database. This form is used primarily during installation to select the sort order of forms according to the kind of database that you have installed. For more information, see the *BMC Remedy IT Service Management Installation Guide*.

IMPORTANT

If you are using a Microsoft SQL Server or Sybase database, you do not need to perform this procedure; the BMC Remedy AR System database is installed ready to be used by these database types.

▶ **To customize the database sort order**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > System Configuration Settings - Application Database Sort Order, and then click Open.

The Schema Sort form appears as shown in Figure 9-9.

Figure 9-9: Schema Sort form

Schema Sort - Matching

Schema Name*	Field Id*	List In...	Sort O...	Sort O...	Sort O...	Sort O...
APR:Approver Lookup	100000722	0	1	1	1	1
APR:Approver Lookup	1000003923	1	1	1	1	1
APR:Approver Lookup	1000003143	2	1	1	1	1
APR:Approver Lookup	1000000636	3	1	1	1	1
APR:SYS-Approval Definition	1000000101	0	2	2	2	2
APR:SYS-Approval Definition	1000000001	1	2	1	1	2
APR:SYS-Approval Definition	1000000136	2	1	1	1	1

Schema Sort SRT000000000001 (Modify)

BMC REMEDY IT SERVICE MANAGEMENT

Schema Sort

Custom Sort Order

Schema Name* APR:Approver Lookup Schema Id 459
 Field Name* AI Field Id* 100000722
 List Index* 0
 Sort Order (MSSQL/Sybase)* 1
 Sort Order (Oracle)* 1
 Sort Order (DB2)* 1
 Sort Order (Informix)* 1
 Description

Current Sort Order

List Index 0
 sort Order 1
 Total Count (schema_sort) 242

Functions

Sort Order Type
 Apply Custom Sort Order Modify All

Apply Custom Sort Order button will create a new sortOrder if one does not exist or modify an existing sortOrder of the current sort order record in schema_sort.
 WARNING! Modify All button will replace the schema_sort table with sortOrder records from SYS:Schema Sort. This function will delete all sort orders in schema_sort first.

Submitter* dev_rmit Submit Date 2/10/2005 2:55:13 PM
 Last Modified By dev_isw Last Modified Date 3/10/2006 8:17:52 AM
 Instance Id ID001143D417DDUbwWdQw5 Data Tags Config-FND

Status*
 Proposed Enabled
 Offline Obsolete
 Archive Delete

Save Close

3 Search for all records. To do this, click Search *without* specifying any search criteria.

4 Set the custom sort order options.

NOTE

The default sort order options can be used in most cases.

5 In the Functions area, select the Sort Order Type.

Select MSSQL_Sybase®, Oracle®, DB2®, or Informix® option.

- 6 Click Modify All.
- 7 In the message box that appears, click Yes to confirm.

NOTE

You will see the changed sort order after you restart BMC Remedy AR Server.

System settings

This function is used to configure general and BMC Remedy AR System settings.

► To modify system settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > System Configuration Settings - System Settings, and then click Open.

The System Settings form appears.

Figure 9-10: System Settings form

The screenshot shows the 'System Settings' form in the BMC Remedy IT Service Management application. The form has a blue header with the BMC logo and a 'Help' button. The main content area is titled 'System Settings' and contains several fields:

- 'Last Modified By' with the value 'JWDNG'.
- 'Last Modified Date' with the value '5/8/2006 1:33:50 PM' and a dropdown arrow.
- 'Enable User Defined Prefix' with a checked checkbox and the text 'Setting the custom prefix flag to 'Yes' will turn on the use of custom prefix's.'
- 'Tenancy Mode*' with a dropdown menu set to 'Single-Tenancy'.
- 'Company+' with a dropdown menu set to 'My Company'.

 At the bottom of the form are three buttons: 'Save', 'Reset', and 'Close'.

- 3 To enable the capability to define unique prefixes for records, select Enable User Defined Prefix.

This option is used in a distributed environment in which records are generated by two or more servers and duplicate records might be generated. When you select this option, you also have to define the unique prefix as described in the *Configuring the ITSM 7.x Suite for Distributed Server Option Environments White Paper*. For example, by default incident records are prefixed with INC (INC000000314355). You might want to configure another server to create incident records with a prefix of IMT (IMT000000314355) to avoid duplicate records.

- 4 To restrict a user's access to only one company's information, select Single-Tenancy in the Tenancy Mode field, and then select the company to which the user should have access.

This restriction is useful, for example, if you have outsourced some IT functions in your organization and want to restrict a third-party vendor to information that belongs to them. For more information about restricting users' access to companies, see "Providing access to people records of other companies" on page 130.

For more information about setting the tenancy mode, see:

- "Tenancy mode" on page 107
- "Granting users access to the Requester Console" on page 467
- *BMC Remedy ITSM Guide to Multi-tenancy*

- 5 Make any other changes, and then click Save.

IMPORTANT

To give individuals access to information in BMC Remedy ITSM, you must give them access to specified companies or select Yes for the Unrestricted Access field on the Login/Access Details of the People form. For more information, see "Creating a non-support person profile" on page 113 or "Adding a support staff person" on page 117.

Configuring Web Services

BMC Remedy ITSM Suite comes with several web services that you can register using the BMC Atrium Core web services registry that is compliant with the Universal Description, Discovery and Integration (UDDI) standard. For more information about the web services registry, see the *BMC Atrium CMDB Developer's Reference Guide*.

NOTE

BMC recommends you register either *all* or *none* of the BMC Remedy ITSM Suite services.

The BMC Remedy AR System Web Services Registry form and its workflow provide an interface to the BMC Atrium Web Services Registry, thereby simplifying the registry process. A web service is registered by creating a request in the form and enabling it. Changing a setting removes the registration. If the registry is unavailable, the workflow attempts to register or deregister the web service later. The form also reports whether the web service is registered.

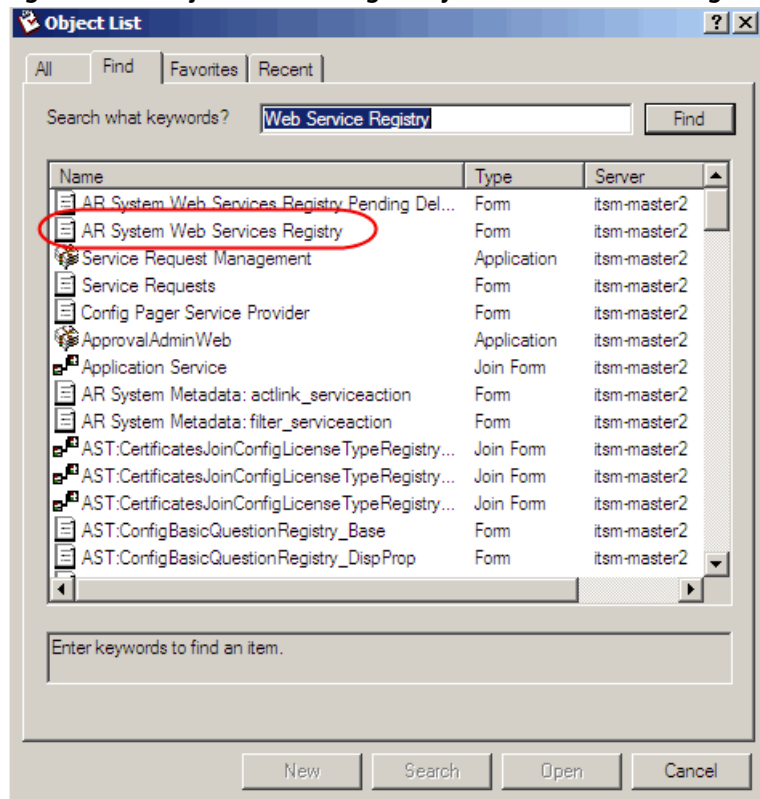
IMPORTANT

Before you can register a web service, the Java plug-in server must be installed and operating, and you must configure a connection to the BMC Atrium Web Services Registry in the WS Registry Integration tab of the AR System Administration: Server Information form. For details, see the *BMC Remedy AR System Configuration Guide*.

► **To register a BMC Remedy ITSM Suite web service**

- 1 Open the BMC Remedy AR System Web Services Registry form by searching for it in the objects list as shown in Figure 9-11 and double-clicking it.

Figure 9-11: Object list showing AR System Web Services Registry form



- 2 Perform a search for services using the following criteria:
 - BMC in the Business Name field
 - No for Publish to Registry?
 - Yes for Recommended Value

For more information about searching, see “Searching for information” on page 40.

The list of BMC Remedy ITSM Suite services that are shipped with the product is returned.

NOTE

If you have created entries since installing BMC Remedy ITSM Suite, these are also returned in the list.

- 3 Select a registry from the list.

The fields of the form are populated with information about this registry, as shown in Figure 9-12.

Figure 9-12: AR System Web Services Registry form with list of web services returned

AR System Web Services Registry - Matching

Description

CAI Events and Event Params Query and Create

CAI Event Params create

AR System Web Services Registry 000000000000002 (Modify)

AR System Web Services Registry

Registry

Business Name BMC **Application Name** Remedy Application

Description CAI Events and Event Params Query and Create

Web Service CAI_Events_WS **Version** 7.5

Build WSDL URL Yes No

Web Server Address http://<WebServerAddress> Example: http(s)://<WebServer><:Port>

Mid Tier Root arsys AR System Server <ARServer>

WSDL URL http://<WebServerAddress>/arsys/WSDL/public/<ARServer>/CAI_Events_WS

Build End Point URL Yes No

Web Server Address http://<WebServerAddress> Example: http(s)://<WebServer><:Port>

Mid Tier Root arsys AR System Server <ARServer>

End Point URL http://<WebServerAddress>/arsys/services/ARService?server=<ARServer>&webService=

Publish To Registry? Yes No (Recommended Value Yes No)

Registration Status Not Registered

4 Make the following updates in the Build WSDL URL section:

- If you want the WSDL URL to be built and displayed in the WSDL URL field, ensure that Yes is selected for the Build WSDL URL field.
- In the Web Server Address field, replace <WebServerAddress> with the URL of the web server that provides the WSDL. Include the port number if required. The syntax is http(s)://<WebServer><:Port>

As you update this field, if you selected Yes for the Build WSDL URL field, the WSDL URL is built and displayed in the WSDL URL field.

- In the ARServer field, enter the name of the BMC Remedy AR System Server that hosts the web service.

- 5 Make the following updates in the Build End Point URL section:
 - a If you want the end point URL to be built and displayed in the End Point URL field, ensure that Yes is selected for the Build End Point URL field.
 - b In the Web Server Address field for the end point URL, replace `<WebServerAddress>` with the URL of the web server that provides the end point URL. Include the port number if required. The syntax is `http<s>://<WebServer><:Port>`

As you update this field, if you selected Yes for the Build End Point URL field, the end point URL is built and displayed in the End Point URL field.
 - c In the ARServer field, enter the name of the BMC Remedy AR System Server that hosts the end point URL for the web service.
- 6 For the Publish to Registry field, select Yes.
- 7 Save the form.
- 8 Complete step 3 through step 7 for all the BMC Remedy ITSM Suite services returned in your search.

Configuring views

“Views” provide different ways of looking at a form. For example, BMC Remedy Incident Management is provided with two views, or ways to see the incident request form: the Best Practice view and the Classic view (see the *BMC Remedy Incident Management User’s Guide* for information about these two views). Your organization can also create custom views for any of the forms accessed by your BMC Action Request System applications.

Use the information in this section if you need to change the default view either to one of the views that are provided out-of-the-box or to deploy a custom view.

Table 9-3 contains a high-level outline of the procedures to perform when you are configuring views. If you are configuring the application for custom views, perform all of the following procedures. If you are configuring the application for out-of-the-box views, then perform only the Deploying a view procedure.

Table 9-3: View configuration procedures

Procedure	Description
Defining a role	Defines the role that you will use later to determine what people see which views.
Mapping a role	Maps the role to a company.
Deploying a view	Maps either the company, a support group, or an individual to a view.

Defining a role

This is the first procedure you perform to configure the application for custom views. If you are configuring the application for out-of-the-box views, skip this procedure and go to “Deploying a view” on page 224.

IMPORTANT

When you finish performing the procedure described in this section, you must restart the BMC Action Request System server.

► To define a role

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Foundation list, choose Incident Management > Advanced Options > View Selection Framework - View Definition, then click Open.
The ViewSelectionRoleDefinition form appears.
- 3 From the Application Name list, select the name of the application for which you are defining the role.
- 4 From the Form Name list, select the form that will be displayed in the new view.
- 5 In the View Name field, type the name of the view you are assigning the role to.

NOTE

The value you type in the View Name field must match the view name that appears on the form that you specified in step 4.

- 6 In the Role field, type the name of the role.

NOTE

You can give the role any meaningful name.

- 7 Click Save.
- 8 Close the form and then restart the BMC Action Request System server.

Mapping a role

When configuring your installation to use custom views, after you define a role, you must map it to the company that will use it.

► To map the role

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Foundation list, choose Incident Management > Advanced Options > View Selection Framework - Define Alias, then click Open.
The ViewSelectionRoleDefinitionSetup form appears.

- 3 From the Application Name list, select the name of the application for which you are mapping the role.
- 4 From the Role list, select the name of the role that you defined in the preceding procedure.
- 5 From the Company list, select the name of the Company for which you are mapping the role.
- 6 Click Add to save the mapping.

Deploying a view

In this procedure, you deploy (or map) the view to one of the following entities:

- **Company**—Ensures all people in the company see the same deployed view.
- **Support Group**—Ensures all people in the chosen support group see the same deployed view. The support group mapping supersedes the company mapping. Use this mapping if you need one or more of your support groups to see a different view than the rest of the company.
- **Individual**—Ensures the specified individual sees the deployed view. The individual mapping supersedes the support group mapping. Use this mapping if you need one or more individuals in a support group to see a different view from the rest of the support group members.

NOTE

After you deploy the view, the affected users must log out of the application and then log back in to see the new view.

► **To deploy the view**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Foundation list, choose Incident Management > Advanced Options > View Selection Framework - Deploy View, then click Open.
- 3 In the Navigation pane on the left side of the form, select the application name and the role.
- 4 Do one of the following:
 - To deploy the view to a company, see “To deploy to a company”, which follows.
 - To deploy the view to a support group, see “To deploy to a support group” on page 225.
 - To deploy the view to an individual, see “To deploy to an individual” on page 225.

► To deploy to a company

- 1 On the Company tab, select the company to which you are mapping the view.
- 2 If necessary, change the sorting order number.

The sorting order is used when a support group or an individual belongs to more than one company. A company with a lower sort order value takes precedence over a company with a higher sort order value.

— **NOTE** —

If you need to change the sort order after you save the deployment, you must first delete the deployment using the delete button, and then recreate the deployment with the new sort order number.

- 3 Click Add to save the deployment.
- 4 Close the form and then have the affected users log back in to the application.

► To deploy to a support group

- 1 On the Support Group tab, select the company to which the support group belongs.
- 2 From the Organization list, select the organization to which the support group belongs.
- 3 From the Support Group list, select the support group to which you are mapping the view.
- 4 If necessary, change the sorting order number.

The sorting order is used when a support group or an individual belongs to more than one company. A company with a lower sort order value takes precedence over a company with a higher sort order value.

— **NOTE** —

If you need to change the sort order after you save the deployment, you must first delete the deployment using the delete button, and then recreate the deployment with the new sort order number.

- 5 Click Add to save the deployment.
- 6 Close the form and then have the affected users log back in to the application.

► To deploy to an individual

- 1 On the Individual Mapping tab, select the company to which the individual belongs.
- 2 From the Organization list, select the organization to which the support group belongs.
- 3 From the Support Group list, select the support group to which you are mapping the view.

- 4 From the People list, select the individual to whom you are mapping the view and then click Add to save the deployment.
- 5 Close the form and then have the affected users log back in to the application.

Chapter 10 Configuring BMC Remedy Change Management

This section covers configuration tasks that are specific to the BMC Remedy Change Management application.

NOTE

For detailed information on configuring change management approvals, see “Configuring approvals” on page 289.

The following topics are provided:

- Configuring risk assessment (page 228)
- Change templates (page 237)
- Advanced options (page 251)

Configuring risk assessment

Risk assessment is a complex area of BMC Remedy Change Management functionality. Risk analysis involves computing the total risk based on risk-related questions and the derived risks from historical records of performance. The higher the risk on a change request, the more time you should take to consider the impact of the purposed change and whether to proceed.

Table 10-1: Risk assessment

Aggregate risk value	Risk level
1	Minimal (Lowest Risk)
2	Low
3	Medium
4	High
5	Extreme (Highest Risk)

As an application administrator, you can create risk factors based on weighted answers to questions. Each question can carry its own risk weight and each answer can carry its own risk values. Change supervisors use these risks to determine how much the change request impacts their company. Armed with this information, they can plan and schedule their changes accordingly.

Derived risks factors are based on the historical performance of changes, based and on data derived from the BMC Remedy Change Management application. When a change is completed, the change manager or assignee must enter a performance value. This performance value is a combined consideration of all derived factors on a change.

Table 10-2: Derived risks

Performance rating	Risk level
1	Lowest (Worst Rating)
2	Low
3	Medium
4	High
5	Highest (Best Rating)

The person entering the performance rating must consider all aspects of the changes performance. This includes looking at how the change manager performed, how well things went with this operational CTI, and any other derived risk factors that are configured. The performance rating stored on the change is then used, in combination with previous historical ratings, to compute an overall performance for each of the derived risk factors. The performance history becomes more meaningful as more changes are accomplished. The performance rating becomes an average of the performance of the assigned manager or the chosen operational categorization. This in turn helps a more accurate risk assessment to be performed on new changes.

NOTE

Performance ratings for changes are not rolled into the average performance until the change is Closed. A change in Completed status does not have the performance rating averaged into the overall rating yet.

Another important factor in the computation of risk is the weight of a risk. The weight is broken into five discrete levels. Each level represents a higher importance to the risk element. An example of the computation used and the impact of weight on the risk is provided later.

Calculating risk weight

The risk weight is specified as a value from 20% to 100%. 20% represents the lowest weight for a risk and 100% represents the highest. You can set the value in 20% increments to 20, 40, 60, 80, or 100. The value of the weight is used as a multiplier for the risk value.

When risk values are used to compute the risk, weights are used to calculate the importance of a risk value. The risk is multiplied by the weight, then added to the other risks multiplied by their weights. The total weight of all risks is added together, and the total risk times weight is divided by the total weight.

$$\frac{(\text{Risk1} \times \text{Weight1}) + (\text{Risk2} \times \text{Weight2}) + (\text{Risk3} \times \text{Weight3})}{\text{Weight1} + \text{Weight2} + \text{Weight3}} = \text{CalculatedRisk}$$

For more information about how these risk weights are used, see “Sample rating calculation” on page 236.

Risk rounding

The calculated risk does not result in a whole number. The results must be rounded to the appropriate whole number. Instead of rounding to the nearest number, a lookup form is used to determine what the whole number value should be. The lookup table is stored on the CHG:ChangeRiskRanges form. By default, the values are set up to move any non-whole number to the next highest number.

For example:

- 2.59 becomes 3
- 2.00001 becomes 3
- 3.99 becomes 4

The logic here is that no risk should be downplayed. Any risk greater than the whole number should be shown as the next risk up. So the resulting calculated risk is used to do a lookup against the CHG:ChangeRiskRanges form, and the whole number value stored on the form is used as the risk.

Creating risk factor questions

You can create a collection of questions (risk factors) with answer choices and predetermined risk values associated with each answer choice. Your answers to these questions enables you to compute a more detailed risk value based on a set of specific circumstances rather than simply choosing one of the predefined risk levels.

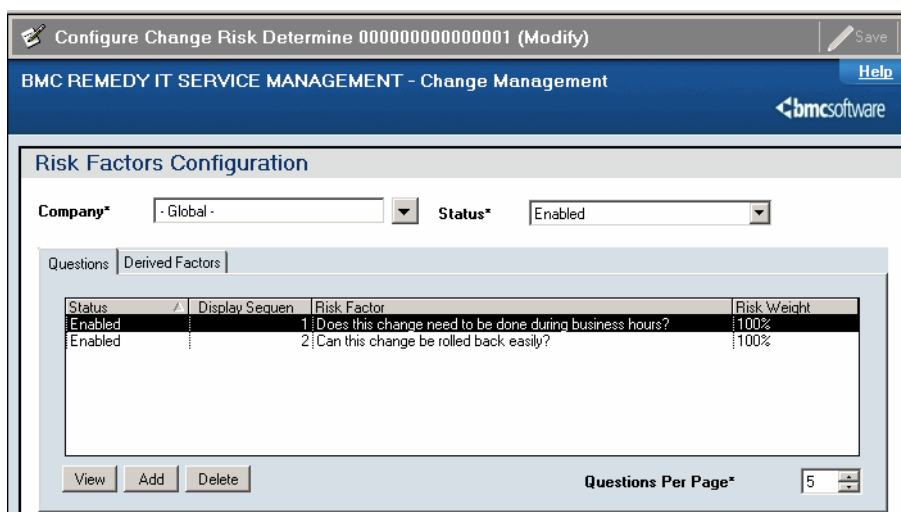
The answers to these questions are provided as multiple choice to minimize the possible answers and speed up the quiz process. By answering a series of questions, the change manager or change assignee working on the change can quickly determine how risky a change is.

A good example of a risk question is, “Will this change impact more than 100 people?” The answer can be Yes or No. You can specify Yes as a risk value of 5, and then specify No as a risk value or 1.

You could ask this same question in another way: “How many people will this change affect?” The answers could then be 1-25 (risk 1), 26-50 (risk 2), 51-75 (risk 3), 76-100 (risk 4), and more than 100 (risk 5).

Both of these questions provide similar information. It is up to the application administrator to understand how important the specific details are. Yes or No questions are quicker to answer, but they do not allow for a risk of 3 to be chosen.

Figure 10-1: Creating a risk factor



When you create risks, include all the questions that your company needs answered to complete a change request. These questions typically involve time, cost, number of people involved, and so on.

These questions then appear in the Risk Assessment Questions dialog box that is accessed from the Classification tab of the Infrastructure Change form.

The responses of the user are recorded and associated with the change entry in the CHG:ChangeRiskFactors form. This back-end form is for reference only, and it not intended to be viewed by the users or administrator.

► To configure new risk factor questions

— NOTE —

For an example on creating questions, see “Sample rating calculation” on page 236. For sample risk factor questions, change the Risk Factors Configuration form to Search mode, and search for the - Global - company.

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Risk Factors > Change Risk Selection, then click Open.

The Risk Factors Configuration form appears.

- 3 In the Company field, select a company.

The company you select appears in the Change Location section of the Infrastructure Change form. You cannot configure a new set of risk questions for a company that already has an existing risk configuration entry. To modify a risk configuration, search for its entry and view it.

- 4 Click Add to create a new risk factor.

The Risk Factors Template form appears. You use this form to create a question, possible answers, display sequence, and weighted risks that are specific to your company policy.

Figure 10-2: Risk Factors Template form

The screenshot shows the 'Risk Factors Template' form. At the top, the title bar reads 'CHG:ChangeRiskFactorsTemplate (win2k3-br7)'. The form header includes the BMC Software logo and a 'Help' button. Below the header, there are two dropdown menus: 'Company*' set to 'Calbro Services' and 'Status' set to 'Enabled'. The main form area is divided into two columns: 'Question Information' and 'Answer Choices'. Under 'Question Information', there is a text area for 'Risk Factor*' containing the text 'Must this change be performed during business hours?', a 'Risk Weight' dropdown set to '100%', and a 'Display Sequence' dropdown set to '1'. Under 'Answer Choices', there is a 'Menu Label' dropdown set to 'Yes', a 'Risk Value' spinner set to '1', and a 'Menu Sequence' dropdown set to '1' with an 'Add / Modify' button. Below these fields is a table with columns for 'Menu Label', 'Risk Value', and 'Menu Sequence'. The table is currently empty, with a 'Click to Refresh' link in the center. At the bottom right of the table area is a 'Delete' button. At the bottom of the form are 'Save' and 'Close' buttons.

— NOTE —

Users only see 5 questions at one time. If you create 10 questions, the first 5 you define in the sequence are displayed. After those questions are answered, the next set of questions appears.

- 5 In the Risk Factor field, enter a question suitable for your company's policies.
For example: Must this change be performed during business hours?
- 6 In the Risk Weight field, select a value from 1 (highest) to 5 (lowest).
You should select risk weights that indicate how significant the risk is to the change request. These values are predetermined in the CHG:ChangeRiskRanges form, and you cannot modify them.
- 7 In the Display Sequence field, select the sequence order to display your question in the Risk Assessment Questions dialog box.
You can create as many questions as necessary. The Risk Assessment Questions dialog box shows a maximum of five questions at a time.
- 8 In the Menu Label field under Answer Choices, define the set of possible answers to display for your question.
Here you create the predefined answers that are suitable for your question:
 - Yes and No
 - Numerical range (for example, 0, less than 5, and so on)
 - Menu choicesThe only limitation is that the number of answer choices cannot exceed five.
- 9 In the Risk Value field, select the value to assign to your answer.
You should select risk values that indicate how likely the risk is to occur. The higher the number you select, the higher the risk is for your change. Make sure you understand clearly the relative values of the answers as they apply to the overall "weight" of the question itself.
If you create an incorrect sequence of labels and risk values, you can use Delete to remove the answer choices then reenter them.
- 10 Use the Menu Sequence field to specify the order in which the answers to your question appear in the Risk Assessment Questions dialog box.
You enter a number and then click Add/Modify.

11 Click Save.

The Risk Factors Template form closes, and your question appears in the Risk Factors Configuration form.

Figure 10-3: Risk Factors Configuration form

The screenshot shows the 'Risk Factors Configuration' form in BMC Remedy IT Service Management. At the top, there is a title bar with 'Configure Change Risk Determine 000000000000001 (Modify)' and a 'Save' button. Below the title bar is a navigation bar with 'BMC REMEDY IT SERVICE MANAGEMENT - Change Management' and a 'Help' button. The main content area is titled 'Risk Factors Configuration' and contains several fields: 'Company*' with a dropdown menu set to 'Global', and 'Status*' with a dropdown menu set to 'Enabled'. Below these fields are two tabs: 'Questions' and 'Derived Factors'. The 'Derived Factors' tab is active, showing a table with the following data:

Status	Display Sequen	Risk Factor	Risk Weight
Enabled	1	Does this change need to be done during business hours?	100%
Enabled	2	Can this change be rolled back easily?	100%

At the bottom of the table, there are three buttons: 'View', 'Add', and 'Delete'. To the right of the table is a 'Questions Per Page*' field with a dropdown menu set to '5'.

12 To add additional questions, repeat steps 4 through 11.

13 In the Questions Per Page field, enter the number of questions to display in the Risk Assessment Questions dialog box.

The maximum number you can set here is 5. If you create 10 questions, the first 5 you define in the sequence are displayed to users. After those questions are answered, the next set of questions appears.

Creating derived factors

When a change is completed, the change manager or change assignee must enter a performance rating to close the request. This performance rating is used for computational purposes, based on all derived factors related to the change. Derived risk factors are based on the historical performance of different aspects of a change. For all configured derived risks, a cumulative performance rating is stored for that aspect of the change.

For example, one derived risk aspect that can be configured allows for tracking of the performance of the change manager. When a change is completed, a performance rating is entered. This rating is stored on the change, and when the change closes, the status becomes Closed. The performance rating is then averaged into the existing performance rating for the change manager.

For example, the average rating for a change manager is shown. In this example, Mary Mann has only been involved in one change as the change manager, so the number of ratings is set to 1. She had a very low performance rating on the change she was involved in. The performance rating is set to 1. This means that Mary is considered a high risk on the next change where she is the change manager. The more changes that she is involved in, the better idea the overall performance will give the system when calculating risk.

You can create a collection of risk factors that can be derived from data pre-existing in the BMC Remedy Change Management application (for example, the priority of associated CIs, or the performance rating of a manager or support group). The risk values for the derived factors are recorded and associated with the change request. This derived factor is calculated in the Performance rating field on the Classification tab that rates the work done when the change request is completed.

BMC Remedy Change Management includes four default types of derived factors:

- CI Priority (highest)
- Performance rating of Support Group
- Performance rating of Change Manager
- Service categorization

IMPORTANT

Risk and Performance have an inverse relationship. A high performance rating leads to a lower risk, and a low performance rating means a higher risk, as shown in Table 10-3.

Table 10-3: Performance ratings and aggregate risk values

Performance rating	Aggregate risk value
1 (Low)	5
2	4
3	3
4	2
5 (High)	1

► To create derived factors

NOTE

For an example on creating derived factors, see “Sample rating calculation” on page 236. For sample derived factors, change the Risk Factors Configuration form to Search mode, and search for the - Global - company.

- 1 Create a risk factor question according to the steps described in “Creating risk factor questions” on page 230.

- 2 Click the Derived Factors tab, then click Add.
The Derived Risk Factors template appears.

Figure 10-4: Derived Risk Factors Template form

- 3 In the Risk Factor Type field, select a type.

The options are:

- **Derived**—Derives risk from CIs with high priorities. The highest priority of all related CIs is recorded. A derived risk factor refers to values that come from related CIs to the change that are not information directly about the change.
- **Derived Rating**—Derives risk based on performance of a manager or a group. The stored performance rating of specific entities is recorded. A derived rating risk factor refers to ratings that are *directly* related to values specified on the change.

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

- 4 In the Risk Weight field, select a value from 1 (highest) to 5 (lowest).

You should select risk weights that indicate how significant the risk is to the change request. These values are defined in the CHG:ChangeRiskRanges form and administrators can modify them as needed.

- 5 In the Field Name field, select the field from the Infrastructure Change form that the risk factor is derived from.

The options are:

- If you selected Derived factor type, you can select the CI Priority field from the Infrastructure Change form. This information is retrieved from the related CIs that are connected to a change.
- If you selected Derived Rating, you can select one of five values:
 - Change Assignee
 - Change Implementer
 - Change Manager

- Operational CTI
- Support Group Name

This information is calculated based on the historical performance of the changes that use these values. For example, if you select Operational CTI, a historical record is kept separately for each CTI used. If the CTI was Hardware > Computer > Laptop, then a performance history would be stored for it for each of the closed changes that had an operational CTI of Hardware > Computer > Laptop.

- 6 If you selected Derived Rating, select Performance Rating from the Rating Field Name field.
- 7 Click Save.

Sample rating calculation

The following example works through a very simple case with two questions and one derived performance rating. This example provides an overview of how BMC Remedy Change Management calculates the aggregate risk value and how the weighting works.

Question 1—Can the change be easily rolled back? (Question Weight 20)

Yes (Risk 1)

No (Risk 5)

Question 2—How many people does the change impact? (Question Weight 100)

1-20 (Risk 1)

21-40 (Risk 2)

41-60 (Risk 3)

61-80 (Risk 4)

81 or more (Risk 5)

Derived risk—Change Manager's performance (Weight 60)

For the change request example, the following data is used:

Question 1—No (Risk 5)

Question 2—21-40 (Risk 2)

Derived Risk—Mary Mann

First, you must determine the risk of Mary Mann. Mary has been involved in 10 changes as CAB Manager. In these changes, Mary has acquired an overall performance rating of 2. You can use the performance rating to determine risk. The relationship between Performance Ratings and Aggregate Risk Value is inverse, so the overall Risk of Mary Mann is 4. As shown previously in Table 10-3 on page 234, the lower the performance, the higher the risk.

You now can perform the calculations on this data.

$$\frac{(\text{Risk1} \times \text{Weight1}) + (\text{Risk2} \times \text{Weight2}) + (\text{Risk3} \times \text{Weight3})}{\text{Weight1} + \text{Weight2} + \text{Weight3}} = \text{CalculatedRisk}$$

$$\frac{(4 \times 60) + (5 \times 20) + (2 \times 100)}{60 + 20 + 100} = \frac{540}{180} = 3$$

Using the formula for calculating risk weight, the aggregate risk value is 3. Each change request has a risk value computed for it as the information on the change is modified. When you first save the change, a risk is initially computed based on the derived factors. Then when you answer, or change the answer to risk questions, and then save the change, the risk is computed again.

You can run a risk report to aid you in understanding what information was used to compute the risk that is shown on the change request. For more information on risk reports, see the *BMC Remedy Change Management User's Guide*.

Change templates



As an administrator, you can simplify the process of creating change requests by creating change templates for change managers and change assignees. A template is a predefined process that provides default settings on the Change form. The values you configure in the Change Template form are used to add information to the Change form. This allows end users to use standard business processes and increase automation and value.

You create change templates to quickly create standard changes. Users can select any templates that are available for your support group. Change templates are useful in any change request that follows well-defined methods for specific and repeated requirements. You can create as many templates as you want. But the best practice is creating templates only for standardized processes that your users perform on a frequent basis.

NOTE

If you use BMC Service Request Management, you can create change templates to use with your application object templates. For more information, see the *BMC Service Request Management Configuration Guide*.

Creating, modifying, or deleting change templates

The following table describes how to create, modify, or delete change templates.

NOTE

Only a change manager, or users with Change Master or Change Config permissions, can create change templates for their support group. They can modify or delete change templates for the authoring group.

Table 10-4: Creating, modifying, or deleting change templates

Function	Action
Create change templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Change Management > Template > Template, then click Open. 3 After you configure all the required settings (plus any optional settings) in the Change Template form, click Save to add your template to the list of available change templates. <p>For more information, see the following sections:</p> <ul style="list-style-type: none"> ■ “Classification settings” on page 239 ■ “Categorization settings” on page 242 ■ “Assignment settings” on page 243 ■ “Relationships settings” on page 244 ■ “Financials settings” on page 246 ■ “Task Templates settings” on page 248
Modify change templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Change Management > Template > Template, then click Open. 3 Switch the Change Template form to search mode. 4 Enter the search parameters to find the template to modify, then click Search. 5 In the list of templates that appears, select a template to modify from the list. 6 Modify the template as needed. Users can only modify templates where they belong to the authoring group. 7 Click Save.

Table 10-4: Creating, modifying, or deleting change templates (Continued)

Function	Action
Delete change templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Change Management > Template > Template, then click Open. 3 Switch the Change Template form to search mode. 4 Enter the search parameters to find the template you want to delete, then click Search. 5 In the list of templates that appears, select the template to delete. Users can only delete templates where they belong to the authoring group. 6 Delete the template using one of the following methods: <ul style="list-style-type: none"> ■ Change to Status field value to Delete and then save the change template. ■ If you are a user with AR Admin permissions, choose Actions > Delete in BMC Remedy User.

Classification settings

The values you specify in a change templates's Classification tab are used to add information to the corresponding Classification tab in the Change form. The Classification tab is used to describe the change and show which products or services are affected by the change. The Change Type, Timing, Impact, and Urgency values are required before a change can be submitted. Selecting these values automatically determines the Risk Level and Lead Time for the change.

Figure 10-5: Change Template form

► To configure classification settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.

The Change Template form appears.

- 3 In the Template Name field, enter a name for the template.
- 4 In the Status field, select an appropriate status level for this template.
- 5 Click the Classification tab.
- 6 In the Change Type field, select an area for the change request (for example, Release).
- 7 In the Timing field, select the timing impact of the change request.

Timing specifies the relative urgency of the change, so that the approvers can assess its magnitude:

- **Emergency**—Resolves an incident or problem deemed critical to the business continuity where a work-around is not sufficient.
- **Expedited**—Enterprise-wide impact with an associated risk.

- **Latent**—Change that has already been performed (for example, if a task implementer is assigned to replace the hard drive on a PC and then decides to upgrade the memory while the box open is open) and requires approval after the fact. Latent timing automatically sets the request status to Completed after you save the change request.
 - **Normal**—Standard change (for example, a PC upgrade) that is typically pre-approved and requires only approval by the Change Manager. The default value is Normal.
 - **No Impact**—Has no impact on the infrastructure and requires no approval.
- 8 In the Impact field, select an impact level for the change request (for example, 1-Extensive/Widespread).
 - 9 In the Urgency field, select a level of urgency for the change request (for example, 1-Critical).
 - 10 In the Priority field, select a priority according to the urgency of the change request (for example, Medium).
 - 11 In the Risk Level field, select a value.
Risk Level 5 is the highest risk and Risk Level 1 is the lowest.
 - 12 In the Lead Time field, enter the number of hours to add to the submit time for the change request.
The lead time is used to calculate the earliest start date and time for the change request.
 - 13 In the Summary field, enter a brief description of the change request.
This information will be entered into the Summary field on the Change form.
 - 14 In the Service field, select a business service CI.
After you select a business service CI, the product categorization from the business service CI is copied over to the Product Categorization Selection fields of the change template (under the Categorization tab). You can overwrite this data. In addition, after you save the change template, an association is created between the business service CI and the change template. You can change or delete the business service CI, and you can manually remove the association from the Relationships table.
 - 15 In the Change Environment field, select what setting your change request takes place in (for example, Production).
 - 16 In the Change Reason field, select the reason why the change is happening (for example, Upgrade).
 - 17 In the Notes field, enter a detailed description of the change request.
 - 18 In the Company field, select the name of the company for this change request.
 - 19 In the Region field, select the area of the company.
 - 20 In the Site Group field, select the city of the company.

- 21 In the Site field, select the location of the company for this change request.
- 22 Click Save.

Categorization settings

The values you configure in a change template’s Categorization tab are used to add information to the operational and product categorization sections of the Classification tab in the Infrastructure Change Request form.

- Operational categorization is based on a three-tier hierarchy defined in the Operational Catalog Setup form. The Operational Categorization Selection settings add information to the operational categorization fields in the Classification tab of the Change Request form.
- Product categorization is based on a five-tier hierarchy defined in your Product Catalog Setup form. The Product Categorization Selection settings add information to the product categorization fields in the Classification tab of the Change Request form.

See “Access point for the Product and Operational Catalog custom configuration” on page 144 and “What is operational catalog information?” on page 157.

► To configure categorization settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.
The Change Template form appears.
- 3 Click the Categorization tab.

Figure 10-6: Change Template form—Categorization tab

- 4 Select the appropriate operational categorizations for Tier 1, Tier 2, and Tier 3.
Here you configure the three-tier hierarchy defined in your operational catalog.
- 5 Select the appropriate product categorizations for Tier 1, Tier 2, Tier 3, Product Name, and Model/Version.
Here you configure the five-tier hierarchy defined in your product catalog. If you do not see the appropriate product, continue to make selections in product categorization until you see the appropriate product.
- 6 Click Save.

Assignment settings

The values you configure in a change templates's Assignment tab are used to add information to two sets of information in the Assignment tab of the Infrastructure Change Request form:

- The Assignee Support Group settings are used to fill in the infrastructure change assignee fields in the Current Assignment tab of the Infrastructure Change Request form. Here you configure the support company, organization, and group that the change request will be assigned to.
- The Implementer Support Group settings are used to fill in the infrastructure change implementer fields in the Implementer Assignment tab of the Infrastructure Change Request form. Here you configure the support company, organization, and group that the change request will be implemented by.

► To configure assignment settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.

The Change Template form appears.

- 3 Click the Assignment tab.

Figure 10-7: Change Template form—Assignment tab

- 4 Specify Assignee Support Group settings as follows:
 - a In the Support Company field, select the company that the change request is assigned to.
 - b In the Support Organization field, select an organization.
 - c In the Support Group Name field, select a group.
- 5 Specify Implementer Support Group settings as follows:
 - a In the Support Company field, select the company that the change request is implemented by.
 - b In the Support Organization field, select an organization.
 - c In the Support Group Name field, select a group.
- 6 Click Save.

Relationships settings

The values you configure in a change template’s Relationships tab are used to provide information for the Relationships tab in the Infrastructure Change Request form.

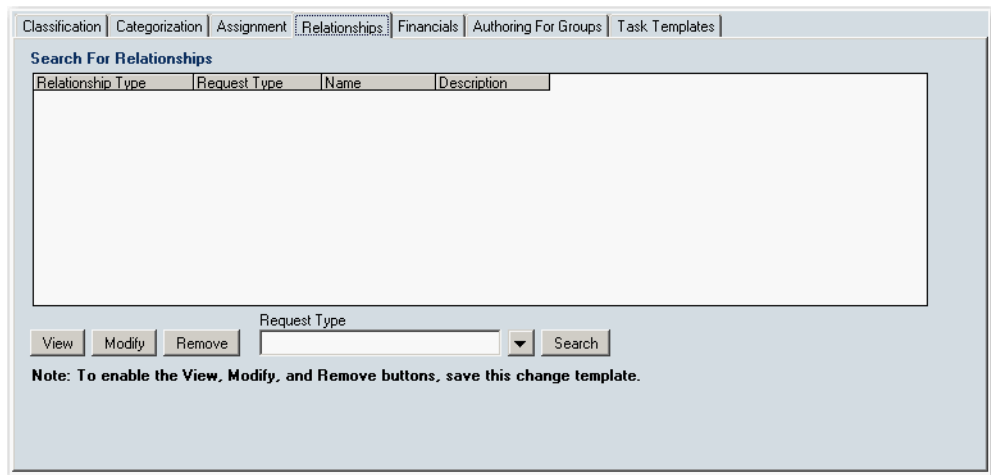
IMPORTANT

To specify a relationship type, you first must save the change template. When you finish defining the change template, open the Change Template form in search mode and locate your change template. You then can configure the relationships settings.

► To configure relationships settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.
The Change Template form appears.
- 3 Perform a search for the change template for which to create a relationship.
- 4 Click the Relationships tab.

Figure 10-8: Change Template form—Relationships tab



Classification | Categorization | Assignment | **Relationships** | Financials | Authoring For Groups | Task Templates

Search For Relationships

Relationship Type	Request Type	Name	Description

View | Modify | Remove | Request Type: ▼ Search

Note: To enable the View, Modify, and Remove buttons, save this change template.

- 5 In the Request Type field, select Configuration Item.
- 6 Click Search.
The CI Relationships Search window appears.
- 7 Enter information in the search criteria tabs, then click Search.
The matching results are displayed in the CIs table.
- 8 Select the appropriate CI.
- 9 In the Relationship Type field, select the type of relationship to associate with the change template (for example, Related to).
- 10 Click Relate.
When you finish creating the configuration item, a message confirms that the new configuration item you created has been related to the change template.
- 11 Repeat steps 8 through 10 for all the CIs to relate to the change template.
- 12 Close the CI Relationship Search form.
- 13 Click Save.

Financials settings

The values you configure in a change template's Financials tab are used to provide information for the Financials tab in the Infrastructure Change Request form.

► To configure financials settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.

The Change Template form appears.

- 3 In the Change Template form, click the Financials tab.

Figure 10-9: Change Template form—Financials tab

The screenshot shows a web-based form with several tabs at the top: Classification, Categorization, Assignment, Relationships, Financials (selected), Authoring For Groups, and Task Templates. Below the tabs, there are two main fields. The first is 'Estimated Total Time', which is a text input field with a small dropdown arrow on the right side. The second is 'Budget Calculation Unit Type', which is a dropdown menu currently showing 'Flat Rate'.

- 4 In the Estimated Total Time field, enter the estimated time in hours to complete the change request.
- 5 In the Budget Calculation Unit Type field, specify how to measure the cost.
- 6 Click Save.

Authoring for groups settings

The Authoring For Groups tab specifies which group can modify this template. To modify the template, a person must meet the following minimum requirements:

- They must have Change Config or Change Master permissions, or they must have the Change User permissions *plus* the Change Manager functional role.
- They must be a member of the support group.

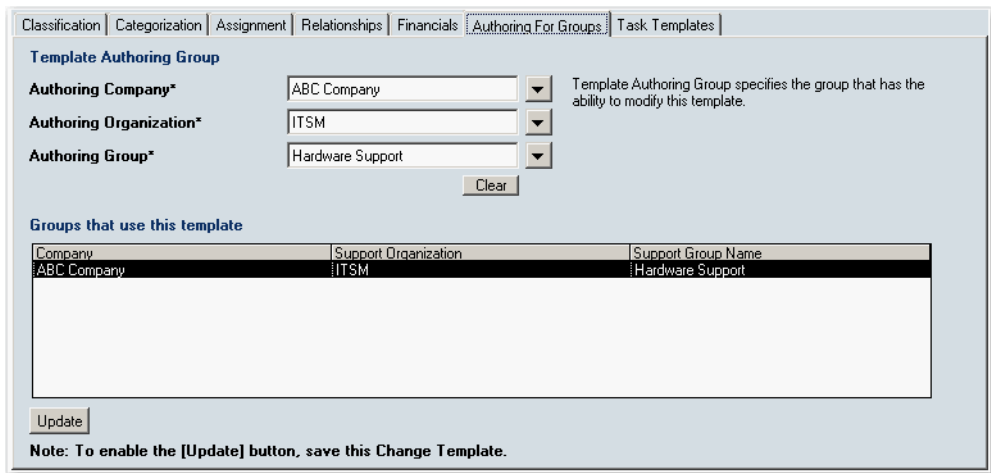
► To configure authoring for groups settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.

The Change Template form appears.

- 3 Click the Authoring For Groups tab.

Figure 10-10: Change Template form—Authoring For Groups tab



Classification | Categorization | Assignment | Relationships | Financials | **Authoring For Groups** | Task Templates

Template Authoring Group

Authoring Company* ABC Company ▼

Authoring Organization* ITSM ▼

Authoring Group* Hardware Support ▼

Clear

Template Authoring Group specifies the group that has the ability to modify this template.

Groups that use this template

Company	Support Organization	Support Group Name
ABC Company	ITSM	Hardware Support

Update

Note: To enable the [Update] button, save this Change Template.

- 4 Select the authoring company, organization, and group.
- 5 Click Save.

Updating the support groups

You can give other support groups the permission to use this change template. These groups cannot modify or delete the template.

— **IMPORTANT** —

To update support groups, you first must save the change template. When you finish defining the change template, open the Change Template form in search mode and locate your change template. You then can configure the relationships settings.

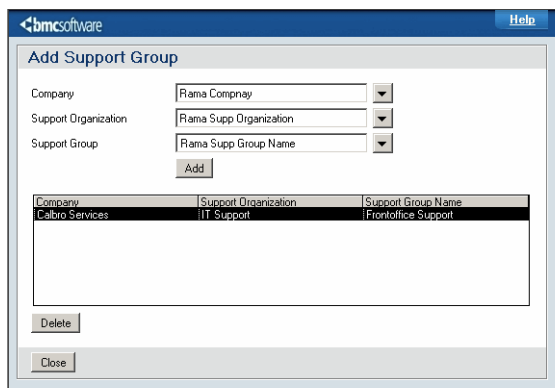
► To update the support groups

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.

The Change Template form appears.

- 3 In the Authoring For Groups tab, click Update.
The Add Support Group dialog box appears.

Figure 10-11: Add Support Group dialog box



- 4 Add or delete any support groups that you have permissions for.
- 5 Close the dialog box.
The information is updated in the Groups that use this template table.

Task Templates settings

The Task Templates tab specifies which tasks and task groups you can include with this template. This functionality is especially useful for standard changes, as you can include (for example, typical tasks used with change and configuration management).

► To configure task templates settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, then click Open.

The Change Template form appears.

- 3 Click the Task Templates tab.

Figure 10-12: Change Template form—Task Templates tab

The screenshot shows the 'Task Templates' tab in a software interface. At the top, there are several tabs: Classification, Categorization, Assignment, Relationships, Financials, Authoring For Groups, and Task Templates. The 'Task Templates' tab is selected. Below the tabs, there are two main sections. The left section is titled 'Related Templates' and contains a table with the following data:

Type	ID	Name	Instance	Sequence
Task Group Tem	1	Create and Modif	1	1

The right section is titled 'Children of Selected Task Group' and contains a table with the following data:

Name	Instance	Type
Create and M	1	Task Templat
Closed Loop	1	Task Templat

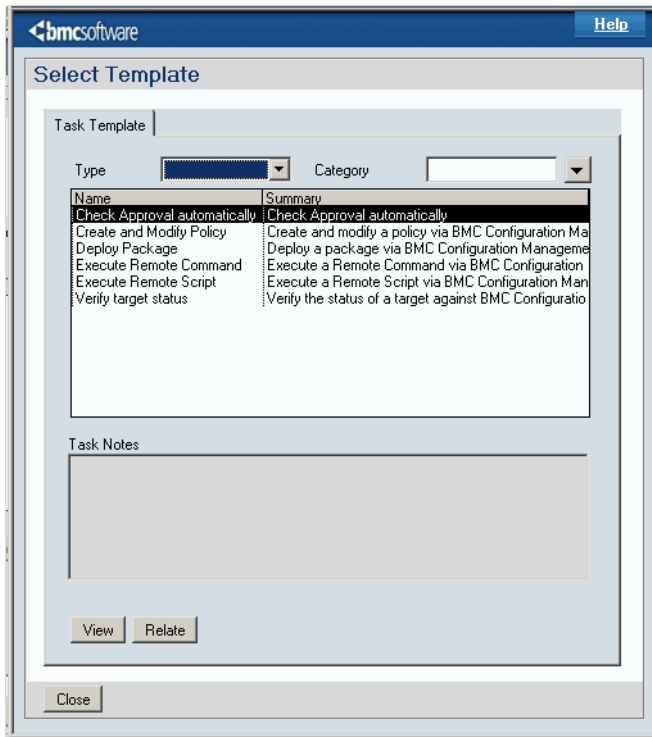
Below the 'Related Templates' table, there are buttons for 'View' and 'Remove', a 'Request Type' dropdown menu, and a 'Relate' button. Below the 'Children of Selected Task Group' table, there is a 'View' button.

The tab shows tasks and task groups related to the template, along with any child tasks of the selected task group.

- Select a task, then click View to display tasks already added to the template.
 - Select a task, then click Remove to remove tasks from the template.
 - Select child tasks, then click View to display these tasks.
 - Select a task or task group template, then click View Flow to see a read-only view of the task flow.
- 4 Select a request type (for example, Task Template).

- 5 Click **Relate** to add a task or task group to your template.
The **Select Template** dialog box appears.

Figure 10-13: Select Template dialog box



- 6 Use the **Type** and **Category** fields to filter the list of tasks displayed.
- 7 Select a task or task group, then click **Relate**.
The task or task group is added to the template. If needed, you can click **View** to display the template.
- 8 Close the dialog box.
- 9 Click **Save**.

Advanced options

The following sections describe how to configure BMC Remedy Change Management advanced options.

Change calendar preference settings

You can configure and customize the following preference values and filter choices in the Change Calendar:

- Default settings in the Quick Filter dialog box
- Duration, global, and level settings of business events that appear in the Change Calendar
- Amount of data that appears when a user scrolls through the Change Calendar

► To configure the change calendar

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Advanced Options > Change Calendar, then click Open.

The Calendar Administration form appears.

Figure 10-14: Calendar Administration form

The screenshot shows the 'CCM Calendar Administration' form within the BMC Remedy IT Service Management interface. The form is organized into several sections:

- Change Requests:** Contains dropdown menus for 'Change Status', 'Approval Status', 'Risk Level', and 'Priority'. It also includes text input fields for 'Company' and 'Region'.
- Business Events:** Features a 'Duration' dropdown menu (currently set to '5 day'), a 'Global' checkbox, and a 'Level' spinner control (set to '3').
- Service CI:** Includes a 'Depth Level' spinner control (set to '3').
- Print Preferences:** Contains radio buttons for 'Page Type' (Letter, A4) and 'Orientation' (Portrait, Landscape). It also has a 'Default Print Title' text box (set to 'CCM Calendar') and a browse button (three dots).

At the bottom of the form, there are 'Save' and 'Clear' buttons. A 'Close' button is located at the bottom left of the window.

- 3 In the Business Events area, specify the default duration of events and change requests displayed in the change calendar.

This is the time period that users see the first time they open their calendar. You can display 5 or 7 days of business events and change requests. But in the 1 day view, *only* change requests are displayed.

- 4 Specify whether global events should be displayed.

This setting is helpful if your organization is acting as a service provider for multiple companies. The global setting shows *all* business events.

- 5 Specify the level of business events.

Enter a number to determine which level of business events are displayed. Each business event has a level attached to it.

- If you enter a level number, only the business events with that level are displayed.
- If you do not enter a level, *all* business events are displayed.

Business events are ordered in the display from top to bottom with the lower level events first.

- 6 Specify the service CI levels.

Enter a number to determine the maximum level at which the service CIs are defined.

Service CIs are in a hierarchical structure as defined by the user's company. Users can specify the depth level to search. For example, depth level 2 means search the specified CI, its children, and its grandchildren (in the hierarchy tree) for all the related change requests. Service CIs that are assigned lower numbers are processed before those that have higher numbers.

- 7 Specify any default print preferences for the calendar.

You can define page type and orientation for the calendar, as well as provide a default title. The single quotation mark (') is illegal in the title string and must not be used. (It causes JavaScript™ errors.)

- 8 Click the Change tab, and then enter information as needed in the following fields in the Change Requests area:

- **Change Status**—State transition in the change request life cycle (for example, Draft).
- **Approval Status**—State in change request life cycle that requires an approval to move forward (for example, Pending).
- **Risk Level**—Relative risk associated with the change, from Risk Level 5 (highest risk) to Risk Level 1 (lowest risk).
- **Priority**—Importance assigned to the change request.

- **Company**—Requests for a particular company. This field is especially useful in a multi-tenancy environment. For more information, see the *BMC Remedy ITSM Guide to Multitenancy*.

- **Region**—Particular area of a company (for example, North or South).

For detailed information about these fields, see the *BMC Remedy Change Management User's Guide*.

Quick filtering is activated by default for any user logging in to the calendar for the first time. However, users can create their own customized search preferences as needed. The filter settings which then appear are whatever preferences the user has defined.

9 Click the Release tab, and then enter information as needed in the following fields:

- **Milestone**—Phase in the release request life cycle (for example, Initiate).

- **Release Status**—Status transition in the release request life cycle (for example, Registered).

- **Risk Level**—Relative risk associated with the release, from Risk Level 5 (highest risk) to Risk Level 1 (lowest risk).

- **Impact**—Extent to which the release affects the business.

- **Priority**—Importance assigned to the release request (for example, High).

- **Release Type**—Categorizes the release that is released into the IT infrastructure (for example, Delta or Package).

- **Deployment Type**—Categorizes the deployment that is released into the IT infrastructure (for example, Phased).

- **Company**—Requests for a particular company. This field is especially useful in a multi-tenancy environment. For more information, see the *BMC Remedy ITSM Guide to Multitenancy*.

- **Region**—Particular area of a company (for example, North or South).

10 Click the System tab.

11 Specify whether the Monthly View Colors should be enabled.

This setting can impact performance. When a large set of data is pulled from the server and displayed, the Date-Picker must fetch all the data from the server, compute the risks for each day, then display the month color-coded by risk level. As a result, you *might* see slower performance in the server.

Color coding applies to the date headers at the top of the Change Request chart as well as to the Date-Picker.

If you disable the Monthly View Colors, the Date-Picker redisplay all days with a white background. After users log out and log back in, they no longer see the days of the month color-coded by risk.

12 Click Save.

Users must log out and back in to activate the new preference settings.

Change prioritization

When a user selects the impact and urgency of a change request, BMC Remedy Change Management adds the numerical weights together to calculate the priority weight and assign a descriptive priority, such as Critical.

The Change Prioritization form shows the prioritization formulas.

IMPORTANT

If you change the weight for an impact or urgency level, or change a priority weight range, you must reselect the impact or urgency in the applicable prioritization formulas.

► To configure change prioritization

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Advanced Options > Change Prioritization, then click Open.
- 3 The Change Prioritization form appears in New mode.
To change to Search mode, click the New Search toolbar icon on BMC Remedy User, or the Search button on the form in a browser.
- 4 Search for the appropriate rule, then open it.

Figure 10-15: Example of change prioritization

The screenshot shows the 'Change Prioritization' form in the BMC Remedy IT Service Management interface. The form is titled 'Change Prioritization' and includes the following fields:

- Company***: A dropdown menu with the selected value '- Global -'.
- Urgency***: A dropdown menu with the selected value '4-Low'.
- +**: A plus sign indicating addition.
- Impact***: A dropdown menu with the selected value '2-Significant/Large'.
- =**: An equals sign indicating multiplication.
- Priority***: A dropdown menu with the selected value 'Medium'.
- Description**: A text input field with a small '...' button to its right.

- 5 Reselect the impact level from the Impact list.
The value of the impact weight is updated to the current value.
- 6 Reselect the urgency level from the Urgency list.
The value of the urgency weight is updated to the current value.
- 7 In the Description field, you can enter a descriptive note.

- 8 Click Save.
- 9 Repeat steps 4 through 8 for each prioritization formula that contains a changed impact weight or changed urgency weight.

Configuring change rules

You can configure the enforcement of specific rules for the BMC Remedy Change Management application (for example, if worklogs, change reasons, or attachments are required).

You can also configure notification rules.

Figure 10-16: Example of a change management rule

Change Configuration Rules	
Company/Group Rule	<input checked="" type="radio"/> Company <input type="radio"/> Group
CHG Rule Status*	Enabled
Company Based Change Rules	
Company	- Global -
General	
Impacted Area Required	No
Impacted Area For Requested By Organization	
Impacted Area For Requested For Organization	
Change Reason Req'd For	
Change Work Info Req'd For	
Default Performance Rating	3
By-pass Schedule For Review	<input type="checkbox"/> Yes
Action on Scheduled Dates Change	Warning Message
Business Hours Selection	None
Assignment Engine Integration	Yes
Assignment Process Implementer	Change Implementer Assignment - Ro
Assignment Process Manager	Change Manager Assignment - Rounc
Assignment Process Assignee	Change Assignee Assignment - Roun
Require Service CI Related after Draft*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto-close	Yes
Auto-close Days	10
Enforce Change Dependency	Error
Enforce Global Time Segments	Warning
Create Service Request on Submit	No

In addition, you use the Configure Change Rules form to configure the method of assignment to automatically select an Assignee (not the assigned support group, but the individual within the group) for change requests in BMC Remedy Change Management. Each company defined in the Company form can have its own assignment rules.

You can configure assignment for one company, or you can configure it for all companies by using the Global option. When BMC Remedy Change Management uses assignment (for example, when it assigns a change request), the Assignment Engine checks the assignment rules for the approver's company. If no rules are found, it uses the rules defined for Global.

► To configure change rules

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Advanced Options > Rules, then click Open.

The Change Configuration Rules form opens.

- 3 To modify an existing rule, search for the appropriate rule, then open it.

— NOTE —

Some change rules settings are automatically defined during installation.

- 4 In the Company /Group Rule field, specify whether this rule applies to a company or a group.
- 5 If this rule is for a company, select the company for which you want to configure assignment, or select the Global option.
Selecting Global configures assignment for all companies.
- 6 In the Impacted Area For Requested By Organization field, select if change requests will auto-generate an impacted area for the Requested By Organization.
The options are No (the default setting) and Yes.
- 7 In the Impacted Area For Requested For Organization field, specify whether change requests will auto-generate an impacted area for the Requested For Organization.
The options are No (the default setting) and Yes.
- 8 In the Change Reason Req'd For field, specify that users must enter a change reason if they assign a certain risk level to the change.
If you configure Risk Level 1 (the lowest level of risk), when users create a Risk Level 1 change request, they are prompted to select a Change Reason (for example, Maintenance) before they can save the change.
No out-of-the-box setting is provided with this field.
- 9 In the Change Work Info Req'd For field, specify that users must enter work information if they assign a certain risk level to the change.
If you configure Risk Level 1 (the lowest level of risk), when users create a Risk Level 1 change request, they are prompted to enter work information (for example, type, date, source, and so on) before they can save the change.
No out-of-the-box setting is provided with this field.
- 10 In the Default Performance Rating field, specify a default performance rating from 1 (lowest) to 5 (highest).
The change manager to the change request typically enters this rating after the change request reaches the Completed state. The default setting is 3.

- 11 In the By-pass Schedule For Review field, specify whether you want the system to ignore the Schedule For Review status.

The default is that the Yes field is cleared—after the change is approved, it moves directly to Scheduled For Approval status.

- 12 In the Action On Scheduled Dates Change field, specify if users are prompted when they modify the scheduled dates on a change request.

The options are Error Message, Warning Message, or No Action. No out-of-the-box settings are provided with this field.

- 13 In the Business Hours Selection field, specify whether to use company hours or assignee hours to calculate times associated with change requests.

IMPORTANT

You must perform the Business Hours Workdays and Business Hours Holidays configuration tasks to set the company's daily hours and holidays, as described in "Business hours and holidays" on page 100.

- 14 In the Require Service CI Related after Draft field, select if users must specify a Service CI (from the Service field) when moving a change request forward from Draft status.

The options are No (the default setting) and Yes.

- 15 To use the assignment engine to automatically assign change requests to individuals, perform the following steps:

- a Set Assignment Engine Integration to Yes.
- b Select the appropriate Assignment Process.
 - Assignment Process Implementer—Assigns the change implementer.
 - Assignment Process Manager—Assigns the change manager.
 - Assignment Process Assignee—Assigns the change assignee.

The following table describes the available assignment processes:

Assignment Process	Description
Capacity	The capacity for each person is specified in the Capacity Rating field on the People form. The assignment process is a ratio-based method. For example, if person A has a capacity of 100 and person B has a capacity of 200, person B can handle twice as many tickets as person A; the assignment engine assigns two tickets to B, then assigns one ticket to A.
Number	The People form tracks the number of tickets assigned to the person. The number assignment process selects the person with the least number of tickets already assigned.
Round Robin	The People form keeps track of the last time the person received an assignment. The round robin assignment process selects the person who was least recently assigned an incident.

For information about configuring the assignment engine, see “Working with auto-assignment” on page 200.

- 16 In the Auto-close field, specify whether change requests are automatically closed. The options are No and Yes (the default setting).
- 17 If you specify that change requests are automatically closed, enter the number of days a change request remains in the Resolved state before its status is automatically set to Closed. The default setting is 10.
- 18 In the Enforce Change Dependency field, select the level of enforcement that applies to change dependencies. The options are None, Warning (the default setting), and Error.
- 19 In the Enforce Global Time Segments field, select the type of enforcement applied to time segments. The options are None, Warning (the default setting), and Error.

NOTE

This enforcement rule does *not* apply to CIs that have blackouts (unavailable time segments). This option applies only to time segments created for either Business Events or Operational Categorization.

- 20 In the Create Request on Submit field, select which action occurs when a change request is submitted. The options are No (the default setting) and Yes. If set to Yes, when a user submits a change request, a corresponding request is created. The customer can view this request, which indicates the change status, through the Requester Console.
- 21 Click Save.

Configuring notification rules

You can configure the rules in which the change manager and change assignee are notified (for example, the change manager is notified when the Status of a change request is set to Planning in Progress and the Status Reason is set to Assigned).

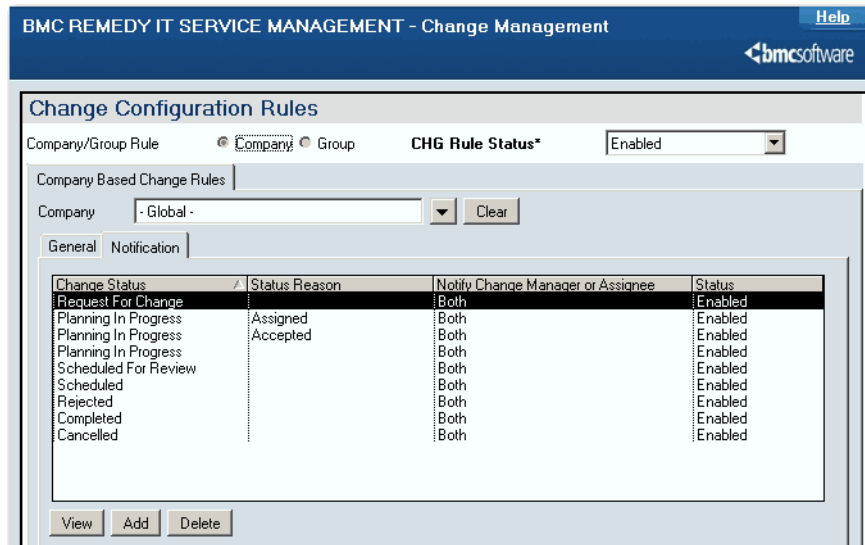
► To configure notification rules

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Advanced Options > Rules, then click Open.

The Change Configuration Rules form appears.

- 3 Click the Notification tab.

Figure 10-17: Change Configuration Rules—Notification tab



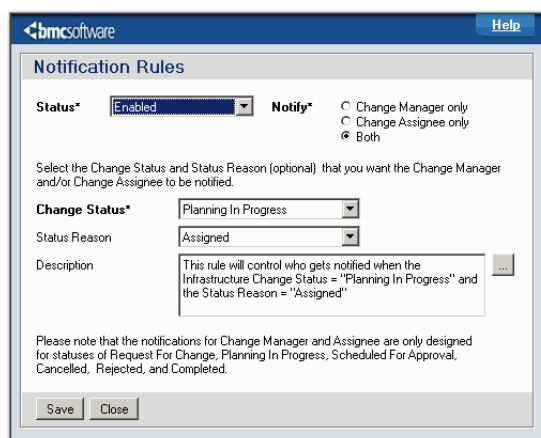
Some notification rules are automatically defined during installation.

- You can select a rule, then click View to display it or modify it, if needed.
- You can select a rule, then click Delete to remove it.

- 4 Click Add.

The Notification Rules dialog box appears. You use this dialog box to create new notification rules.

Figure 10-18: Notification Rules dialog box



- 5 Define the status of your new rule (for example, Proposed or Enabled).
- 6 Select the roles you want to notify (for example, Change Manager only).

- 7 Select the change status for which you want the notification sent (for example, Draft).

Notifications to the Change Manager and Change Assignee are configured out of the box *only* for the following change states: Request For Change, Planning In Progress, Scheduled For Approval, Cancelled, Rejected, and Completed.

- 8 (Optional) Select a status reason.

If you select the Planning In Progress state, you can include a status reason (for example, Accepted). But not all changes states include status reasons.

- 9 Enter a helpful description of the new change rule (for example, the status that triggers the notification).
- 10 Click Save.

Chapter 11 **Configuring Release Management**

This section covers configuration tasks that are specific to the Release Management module within the BMC Remedy Change Management application.

The following topics are provided:

- [Configuring release templates \(page 262\)](#)
- [Configuring activity templates \(page 272\)](#)
- [Configuring phase and exit criteria milestones \(page 275\)](#)
- [Configuring release priorities \(page 279\)](#)
- [Configuring release rules \(page 281\)](#)
- [Configuring activity rules \(page 286\)](#)

Configuring release templates



As an administrator, you can simplify the process of creating release requests by creating release templates for release managers. A template is a predefined process that provides default settings on the Release form. The values you configure in the Release Template form are used to add information to the Release form. This allows end users to use standard business processes and increase automation and value.

Users can select any templates that are available for your support group. Release templates are useful in any release request that follows well-defined methods for specific and repeated requirements. You can create as many templates as you want. But the best practice is creating templates only for standardized processes that your users perform on a frequent basis.

Creating, modifying, or deleting release templates

The following table describes how to create, modify, or delete release templates.

NOTE

Only a release manager, or users with Release Master or Release Config permissions, can create release templates for their support group. They can modify or delete release templates for the authoring group.

Table 11-1: Creating, modifying, or deleting release templates

Function	Action
Create release templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Release Management > Template > Template, then click Open. 3 After you configure all the required settings (plus any optional settings) in the Release Template form, click Save to add your template to the list of available release templates. <p>For more information, see the following sections:</p> <ul style="list-style-type: none"> ■ “Classification settings” on page 263 ■ “Categorization settings” on page 265 ■ “Manifest settings” on page 267 ■ “Assignment settings” on page 268 ■ “Relationships settings” on page 269 ■ “Authoring for groups settings” on page 270

Table 11-1: Creating, modifying, or deleting release templates (Continued)

Function	Action
Modify release templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Release Management > Template > Template, then click Open. 3 Switch the Release Template form to search mode. 4 Enter the search parameters to find the template to modify, then click Search. 5 In the list of templates that appears, select a template to modify from the list. 6 Modify the template as needed. Users can only modify templates where they belong to the authoring group. 7 Click Save.
Delete release templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Release Management > Template > Template, then click Open. 3 Switch the Release Template form to search mode. 4 Enter the search parameters to find the template you want to delete, then click Search. 5 In the list of templates that appears, select the template to delete. Users can only delete templates where they belong to the authoring group. 6 Delete the template using one of the following methods: <ul style="list-style-type: none"> ■ Change to Status field value to Delete and then save the release template. ■ If you are a user with AR Admin permissions, choose Actions > Delete in BMC Remedy User.

Classification settings

The values you specify in a release templates's Classification tab are used to add information to the corresponding Classification tab in the Release form. The Classification tab is used to describe the release and show which products or services are affected by the release. The Impact, Urgency, and Risk Level values are required before a release can be submitted.

► To configure classification settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Template > Template, then click Open.

The Release Template form appears.

- 3 In the Template Name field, enter a name for the template.
- 4 In the Status field, select an appropriate status level for this template.
- 5 Click the Classification tab.

Figure 11-1: Release Template form—Classification tab

The screenshot shows the 'Classification' tab of the Release Template form. At the top, there are navigation tabs: Classification, Categorization, Manifest, Assignment, Relationships, and Authoring For Groups. The 'Classification' section contains the following fields and values:

- Impact***: 3-Moderate/Limited
- Urgency***: 3-Medium
- Priority**: Medium
- Risk Level***: Risk Level 2
- Summary**: (empty text box with a search icon)
- Notes**: (empty text box with a search icon)
- Release Type**: Delta
- Service**: Payroll Service
- Deployment Type**: Phased

The 'Location' section contains the following fields and values:

- Company*+**: Calbro Services
- Region**: Americas
- Site Group**: United States
- Site+**: Headquarters, Building 1.31

There are 'Clear' buttons located at the bottom right of the Classification and Location sections.

- 6 In the Impact field, select an impact level for the release request (for example, 1-Extensive/Widespread).
- 7 In the Urgency field, select a level of urgency for the release request (for example, 1-Critical).
- 8 In the Priority field, select a priority according to the urgency of the release request (for example, Medium).
- 9 In the Risk Level field, select a value.
Risk Level 5 is the highest risk and Risk Level 1 is the lowest.
- 10 In the Summary field, enter a brief description of the release request.
This information will be entered into the Summary field on the Release form.
- 11 In the Notes field, enter a detailed description of the release request.
- 12 In the Release Type field, select an area for the release request (for example, Delta).
- 13 In the Service field, select a business service CI.

After you select a business service CI, the product categorization from the business service CI is copied over to the Product Categorization Selection fields of the release template (under the Categorization tab). You can overwrite this data. In addition, after you save the release template, an association is created between the business service CI and the release template. You can change or delete the business service CI, and you can manually remove the association from the Relationships table.

- 14 In the Deployment type field, select the Deployment type for the release request.

Phased	<p>Stage the deployment of the release to a part of the user base. The operation is repeated for subsequent parts of the user base through a scheduled rollout plan. For example, the release manager identifies a set of changes that must be done at the same time: all changes for Building 1 at Phase 1, all changes for Building 2 at Phase 2, and so on.</p> <p>You typically use phased deployments when new services are introduced into a store environment in manageable phases (such as retail organizations).</p>
Non-Phased	<p>All changes or activities deployed all at the same time in one operation with no restrictions (for example, a company-wide rollout of new servers).</p> <p>You typically use non-phased deployments when introducing an application change, and consistency of service across the organization is important.</p> <p>Note: IT Infrastructure Library® (ITIL®) Service Transition Version 3 describes non-phased deployment as the “Big Bang” method.</p>

- 15 In the Company field, select the name of the company for this release request.
- 16 In the Region field, select the area of the company.
- 17 In the Site Group field, select the city of the company.
- 18 In the Site field, select the location of the company for this release request.
- 19 Click Save.

Categorization settings

The values you configure in a release template’s Categorization tab are used to add information to the operational and product categorization sections of the Classification tab in the Release form.

- Operational categorization is based on a three-tier hierarchy defined in the Operational Catalog Setup form. The Operational Categorization Selection settings add information to the operational categorization fields in the Classification tab of the Release form.
- Product categorization is based on a five-tier hierarchy defined in your Product Catalog Setup form. The Product Categorization Selection settings add information to the product categorization fields in the Classification tab of the Release form.

See “Access point for the Product and Operational Catalog custom configuration” on page 144 and “What is operational catalog information?” on page 157.

► To configure categorization/process settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Template > Template, then click Open.

The Release Template form appears.

- 3 Click the Categorization tab.

Figure 11-2: Release Template form—Categorization tab

The screenshot shows the 'Categorization' tab of the Release Template form. At the top, there are tabs for 'Classification', 'Categorization' (which is active), 'Manifest', 'Assignment', 'Relationships', and 'Authoring For Groups'. Below the tabs, the form is organized into two columns. The left column is titled 'Operational Categorization Selection' and contains a 'Business Justification' dropdown menu with 'Corporate Strategic' selected, and three 'Operational Category Tier' dropdown menus (Tier 1, Tier 2, and Tier 3). The right column is titled 'Product Categorization Selection' and contains three 'Product Category Tier' dropdown menus (Tier 1, Tier 2, and Tier 3), a 'Product Name+' dropdown menu, a 'Model/Version' dropdown menu, and a 'Manufacturer' text input field. A 'Clear' button is located at the bottom of the Operational section, and another 'Clear' button is at the bottom of the Product section.

- 4 Select a Business Justification to indicate the business reason for implementing the release request (for example, Corporate Strategic).

Business justification information is important when the request goes through the approval process. You use this information to make sure funding is available to implement the release.

- 5 Select the appropriate operational categorizations for Tier 1, Tier 2, and Tier 3. Here you configure the three-tier hierarchy defined in your operational catalog.
- 6 Select the appropriate product categorizations for Tier 1, Tier 2, Tier 3, Product Name, and Model/Version.

Here you configure the five-tier hierarchy defined in your product catalog. If you do not see the appropriate product, continue to make selections in product categorization until you see the appropriate product.

- 7 Click Save.

Manifest settings

You can simplify the process of creating releases by configuring release templates that inherit change and activity templates, as part of the release manifest. When release template is selected for each associated activity template or change template, a new change request or activity request is created in the manifest on the basis of selected template.

NOTE

Only members of the Authoring Group defined on this template can modify this entry.

► To configure manifest settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Template > Template, then click Open.
The Release Template form appears.
- 3 Click the Manifest tab.

Figure 11-3: Release Template form—Manifest tab

Milestone	Request Type	Request ID	Request Summary
	Infrastructure Change Templ	CTP0000000000007	Change Template
	Infrastructure Change Templ	CTP0000000000006	Change Template

Request Type: Search

- 4 Add a change or activity template to the release manifest:
 - a From the Request Type list at the bottom of the Manifest tab, select Infrastructure Change Template or Activity Template.
 - b Click Search.
 - c From the list displayed, click Select to add the template for your support group to the manifest.
- 5 View, modify, or remove the change or activity template from the release manifest, as needed.
- 6 Click Save.

Assignment settings

The values you configure in a release templates's Assignment tab are used to add information to the Release Manager fields in the Assignment tab of the Release form. Here you configure the support company, organization, group, and release manager that the release request will be assigned to.

► To configure assignment settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Template > Template, then click Open.

The Release Template form appears.

- 3 Click the Assignment tab.

Figure 11-4: Release Template form—Assignment tab

The screenshot shows the 'Assignment' tab of the Release Template form. At the top, there are several tabs: Classification, Categorization, Manifest, Assignment (which is the active tab), Relationships, and Authoring For Groups. Below the tabs, the 'Release Manager' section is visible. It contains four dropdown menus, each with a label and a selected value: 'Support Company' is set to 'Calbro Services', 'Support Organization' is set to 'IT Support', 'Support Group Name' is set to 'Frontoffice Support', and 'Release Manager' is set to 'Allen Allbrook'. A 'Clear' button is positioned below the Release Manager dropdown.

- 4 Specify Release Manager settings as follows:
 - a In the Support Company field, select the company that the release request is assigned to.
 - b In the Support Organization field, select an organization.
 - c In the Support Group Name field, select a group.
 - d In the Release Manager field, select a manager.
- 5 Click Save.

Relationships settings

The values you configure in a release template's Relationships tab are used to provide information for the Relationships tab in the Release form.

— **IMPORTANT** —

To specify a relationship type, you first must save the release template. When you finish defining the release template, open the Release Template form in search mode and locate your release template. You then can configure the relationships settings.

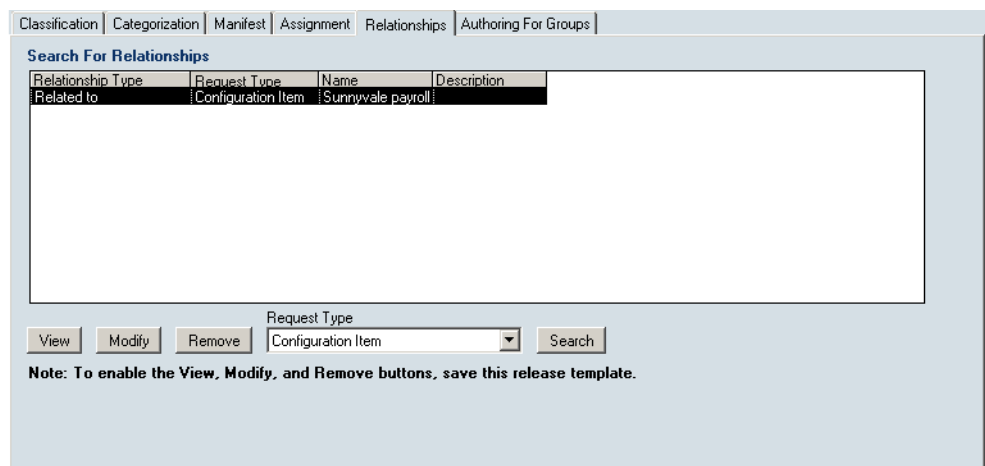
► To configure relationships settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Template > Template, then click Open.

The Release Template form appears.

- 3 Perform a search for the release template for which to create a relationship.
- 4 Click the Relationships tab.

Figure 11-5: Release Template form—Relationships tab



Relationship Type	Request Type	Name	Description
Related to	Configuration Item	Sunnyvale payroll	

Request Type
Configuration Item

Note: To enable the View, Modify, and Remove buttons, save this release template.

- 5 In the Request Type field, select Configuration Item.
 - 6 Click Search.
- The CI Relationships Search window appears.
- 7 Enter information in the search criteria tabs, then click Search.
- The matching results are displayed in the CIs table.
- 8 Select the appropriate CI.
 - 9 In the Relationship Type field, select the type of relationship to associate with the release template (for example, Related to).

- 10 Click Relate.
When you finish creating the configuration item, a message confirms that the new configuration item you created has been related to the release template.
- 11 Repeat steps 8 through 10 for all the CIs to relate to the release template.
- 12 Close the CI Relationship Search form.
- 13 Click Save.

Authoring for groups settings

The Authoring For Groups tab specifies which group can modify this template. To modify the template, a person must meet the following minimum requirements:

- They must have Release Config or Release Master permissions, or they must have the Release User permissions *plus* the Release Manager functional role.
- They must be a member of the support group.

► To configure authoring for groups settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Template > Template, then click Open.

The Release Template form appears.

- 3 Click the Authoring For Groups tab.

Figure 11-6: Release Template form—Authoring For Groups tab

The screenshot shows the 'Authoring For Groups' tab of the Release Template form. It features three dropdown menus: 'Authoring Company*' (set to Calbro Services), 'Authoring Organization*' (set to IT Support), and 'Authoring Group*' (set to Frontoffice Support). A 'Clear' button is located below these menus. A table titled 'Groups that use this template' contains the following data:

Company	Support Organization	Support Group Name
Calbro Services	IT Support	Frontoffice Support

An 'Update' button is positioned at the bottom left of the form area. A note at the bottom states: 'Note: To enable the [Update] button, save this Release Template.'

- 4 Select the authoring company, organization, and group.
- 5 Click Save.

Updating the support groups

You can give other support groups the permission to use this release template. These groups cannot modify or delete the template.

IMPORTANT

To update support groups, you first must save the release template. When you finish defining the release template, open the Release Template form in search mode and locate your release template. You then can configure the relationships settings.

► To update the support groups

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Template > Template, then click Open.

The Release Template form appears.

- 3 Click the Authoring For Groups tab.
- 4 Click Update.

The Add Support Group dialog box appears.

Figure 11-7: Add Support Group dialog box

Company	Support Organization	Support Group Name
Calbro Services	IT Support	Frontoffice Support

- 5 Add or delete any support groups that you have permissions for.
If you remove the group's association with the release template, it no longer has privileges to use that release template.
- 6 Close the dialog box.

The information is updated in the Groups that use this template table.

Configuring activity templates

As an administrator, you can simplify the process of creating activities by creating activity templates for release managers. A template is a predefined process that provides default settings on the Activity form. The values you configure in the Activity Template form are used to add information to the Activity form. This allows end users to use standard business processes and increase automation and value.

Creating, modifying, or deleting activity templates

The following table describes how to create, modify, or delete activity templates.

NOTE

Only a release manager, or users with Activity Config permissions, can create activity templates for their support group. They can modify or delete activity templates for the authoring group. You can create classifications, assignments, or add tasks to this template.

Table 11-2: Creating, modifying, or deleting activity templates

Function	Action
Create activity templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Activity System > Template > Template, then click Open. 3 After you configure all the required settings (plus any optional settings) in the Activity Template form, click Save to add your template to the list of available activity templates. <p>For more information, see the following sections:</p> <ul style="list-style-type: none"> ■ “Classification settings” on page 273 ■ “Assignment settings” on page 274 ■ “Task Templates settings” on page 275
Modify activity templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Activity System > Template > Template, then click Open. 3 Switch the Activity Template form to search mode. 4 Enter the search parameters to find the template to modify, then click Search. 5 In the list of templates that appears, select a template to modify from the list. 6 Modify the template as needed. Users can only modify templates where they belong to the authoring group. 7 Click Save.

Table 11-2: Creating, modifying, or deleting activity templates (Continued)

Function	Action
Delete activity templates	<ol style="list-style-type: none"> 1 From the Application Administration Console, click the Custom Configuration tab. 2 From the Application Settings list, choose Activity System > Template > Template, then click Open. 3 Switch the Activity Template form to search mode. 4 Enter the search parameters to find the template you want to delete, then click Search. 5 In the list of templates that appears, select the template to delete. Users can only delete templates where they belong to the authoring group. 6 Delete the template using one of the following methods: <ul style="list-style-type: none"> ■ Change to Status field value to Delete and then save the activity template. ■ If you are a user with AR Admin permissions, choose Actions > Delete in BMC Remedy User.

Classification settings

The values you specify in an activity templates’s Classification tab are used to add information to the General and Classification tabs in the Activity form. The Classification tab is used to locate the activity and show the priority of the activity.

Figure 11-8: Activity Template form

The screenshot shows the 'Activity Template' form in the BMC Software interface. At the top, there's a 'bmcsoftware' logo and a 'Help' button. The form has several sections:

- Template Name***: A text input field containing 'Train users in new software program'.
- Summary***: A text input field containing 'Request this activity to train users in new'.
- Template ID**: A text input field containing 'ATP000000000001'.
- Status***: A dropdown menu set to 'Enabled'.
- Classification**: A tabbed section with three tabs: 'Classification', 'Assignment', and 'Task Templates'. The 'Classification' tab is selected.
 - Notes**: A text input field.
 - Priority**: A dropdown menu set to 'Medium'.
 - Location**: A section with four dropdown menus: 'Company*' (set to 'Calbro Services'), 'Region', 'Site Group', and 'Site+'.
 - Clear**: A button at the bottom of the Classification section.

► To configure classification settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Activity System > Template > Template, then click Open.

The Activity Template form appears.

- 3 In the Template Name field, enter a name for the template.
- 4 In the Status field, select an appropriate status level for this template.
- 5 In the Summary field, enter a brief description of the activity.
This information will be entered into the Summary field on the Activity form.
- 6 Click the Classification tab.
- 7 In the Notes field, enter a detailed description of the activity.
- 8 In the Priority field, select a priority according to the urgency of the activity (for example, Medium).
- 9 In the Company field, select the name of the company for this activity.
- 10 In the Region field, select the area of the company.
- 11 In the Site Group field, select the city of the company.
- 12 In the Site field, select the location of the company for this activity.
- 13 Click Save.

Assignment settings

The values you configure in an activity templates's Assignment tab are used to add information to the Activity Assignee fields in the Assignment tab of the Activity form. Here you configure the support company, organization, and group that the activity will be assigned to.

► To configure assignment settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Activity System > Template > Template, then click Open.
- 3 In the Activity Template form, click the Assignment tab.
- 4 Specify Activity Assignee settings as follows:
 - a In the Support Company field, select the company that the activity is assigned to.
 - b In the Support Organization field, select an organization.
 - c In the Support Group Name field, select a group.
- 5 Click Save.

Task Templates settings

The Task Templates tab specifies which tasks and task groups you can include with this template. This functionality is especially useful for routine tasks typically included with activities (for example, training, setting up classrooms, and so on).

► To configure task templates settings

1 From the Application Administration Console, click the Custom Configuration tab.

2 From the Application Settings list, choose Change Management > Template > Template, then click Open.

3 In the Activity Template form, click the Task Templates tab.

The tab shows tasks and task groups related to the template, along with any child tasks of the selected task group.

- Select a task, then click View to display tasks already added to the template.
- Select a task, then click Remove to remove tasks from the template.
- Select child tasks, then click View to display these tasks.

4 Select a request type (for example, Task Template).

5 Click Relate to add a task or task group to your template.

6 Select a task or task group, then click Relate.

The task or task group is added to the template. If needed, you can click View to display the template, or you can click Delete to remove it.

7 Click View Flow to see a read-only view of the task flow in the task group.

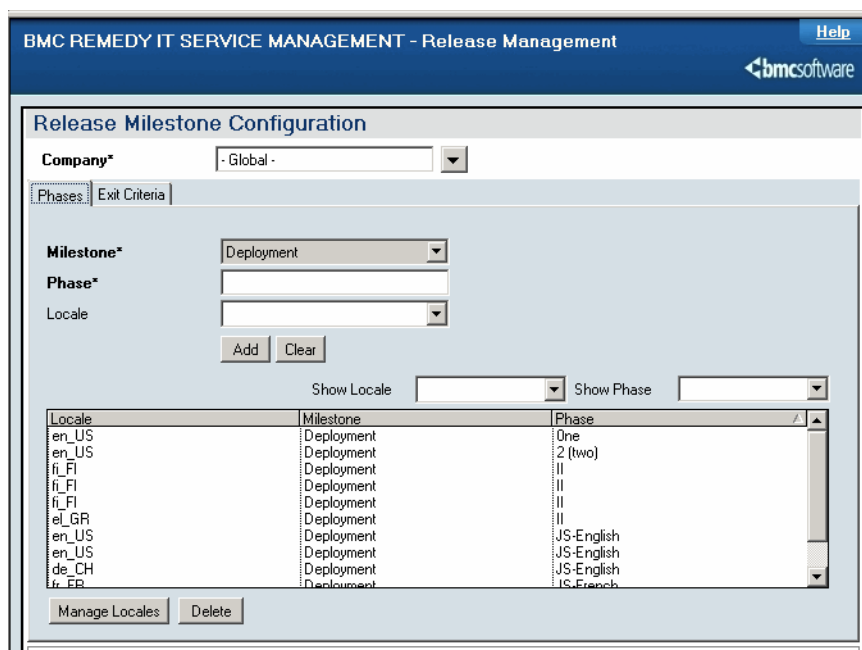
8 Close the dialog box.

9 Click Save.

Configuring phase and exit criteria milestones

You can enforce milestones that require all change requests and activities must be completed before the release can move to the next milestone. For example, you can configure Release Management so that all the Planning activities must be completed before the release can move to Build.

Figure 11-9: Release Milestone Configuration form



The Release Milestone Configuration form allows you to define phases, as well as the exit criteria, for each milestone.

NOTE

For the 7.5.00 release, you can only configure phases for the Deployment milestone.

Finally, you can use this form to localize release milestones.

► To configure phase milestones

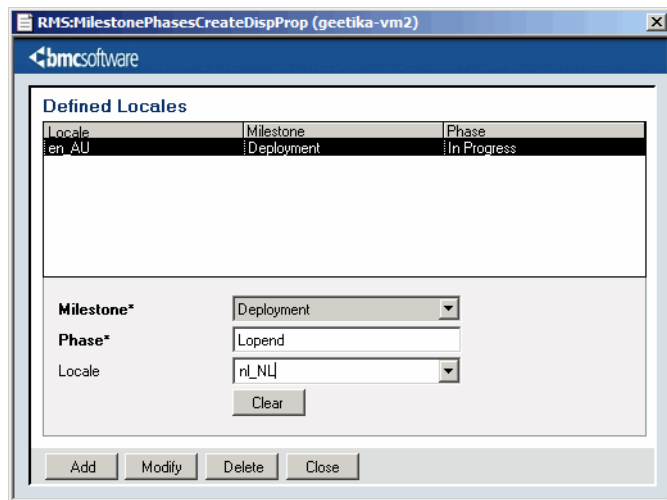
- 1 In the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Advanced Options > Milestone Configuration, and then click Open.

You can filter table results by using the Show Locale and Show Phase menus. The Show Phase menu only shows phases defined for the locale you are in.

- 3 In the Phase Name field, define the Deployment phase that requires a milestone (for example, Phase 1, Phase 2, and so on).
- 4 Select a locale from the menu, and then click Add to create a new locale for the Deployment milestone (for example, en_AU for Australian English).

- 5 Define the localized text for each phase by performing the following actions.
 - a After adding a phase, select the phase from the table, and then click Manage Locales.

Figure 11-10: Defined Locales dialog box



This action allows you to add localized text for the selected phase.

- b Enter localized text into the Phase field.
- c Select the locale.
- d Click Add.

You can modify or delete localized text as needed.

- e Close the Manage Locales dialog box when you are finished.

The localized text appears in the Release Milestone Configuration form.

- 6 Close the Release Milestone Configuration form when you are finished.

Configuring exit criteria

The Exit Criteria milestones defines what action should occur (for example, Warning or Error) at the exit of each milestone.

Figure 11-11: Configuring exit criteria for milestones

The screenshot shows the 'Release Milestone Configuration' interface. At the top, it says 'BMC REMEDY IT SERVICE MANAGEMENT - Release Management' and 'Help'. The 'Company*' dropdown is set to 'Calbro Services'. The 'Exit Criteria' tab is active. The configuration fields are: 'Milestone*' (Deployment), 'Request Type*' (Change), 'Status to Check For' (Completed), and 'Action*' (Error). There are 'Add' and 'Clear' buttons. Below is a table with columns: Milestone, Request Type, Action, and Status To Check For. The table is empty. A 'Delete' button is at the bottom left.

In addition to the exit criteria supplied out-of-the-box for you, the Release Management administrator can define new exit criteria. You can configure exit criteria for each company, or create new global priorities. If you create and enable new exit criteria, it overrides the default setting, unless you disable it.

For example, the following exit criteria indicate that, before a release for Acme Inc. can exit the Deployment milestone, the system must verify if all changes are in Completed status.

- Milestone = Deployment
- Request Type = Change
- Status to Check For = Completed
- Action = Error

If they are not, the system displays an Error message.

► To configure exit criteria

- 1 In the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Advanced Options > Milestone Configuration, and then click Open.
- 3 Click the Exit Criteria tab.
- 4 In the Milestone field, specify the release milestone (for example, Planning).

- 5 In the Request Type field, specify the application request type (for example, Activity).
You can specify the following types:
 - Change
 - Activity
 - Change and Activity
- 6 In the Status to Check For field, specify the release status (for example, Completed or Closed).
- 7 In the Action field, specify the level of enforcement that applies to the release criteria (for example, Warning or Error).
- 8 Click Save.

Configuring release priorities

In addition to the release priorities supplied out-of-the-box for you, the Release Management administrator can define new Priority maps with an Impact and Urgency combination. You can configure release prioritization data for each company, or create new global priorities. If you create and enable a new release priority, it overrides the default setting, unless you disable it.

When creating priorities, the Priority field on the main Release form is calculated based on the Urgency and Impact specified.

NOTE

Impact + Urgency = Priority.

► To configure release priorities

- 1 In the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Advanced Options> Release Prioritization, and then click Open.

Figure 11-12: Release Prioritization form

The screenshot shows the 'Release Prioritization' form within the BMC Remedy IT Service Management interface. The form is titled 'Release Prioritization' and is part of the 'Release Management' section. It contains several fields:

- Company***: A dropdown menu with 'Calbro Services' selected.
- Urgency***: A dropdown menu with '4-Low' selected.
- Impact***: A dropdown menu with '3-Moderate/Limited' selected.
- Priority***: A dropdown menu with 'Low' selected.
- Description**: A text area for entering a description.

- 3 Select a company to create the release prioritization for.
 You can create a process flow for Calbro Financial Corporation and a completely different flow for Acme Corporation.
 If you select Global, the approval process applies to *all* companies.
- 4 (Optional) Enter a description.
- 5 In the Urgency field, specify the importance assigned to the release (for example, 3-Medium).
- 6 In the Impact field, specify the extent to which the release affects the business (for example, 3-Moderate/Limited).
- 7 In the Priority field, specify the importance you (as support staff) assign to the release (for example, Low).
- 8 Save your changes.
 As a result, when a release manager creates a release for Calbro Services and selects an Impact of 3-Moderate/Limited, the Release form now is set to the new Priority of Low.

Figure 11-13: Defining priorities in the Release form

This close-up screenshot shows the following fields from the Release form:

- Impact***: 3-Moderate/Limited
- Urgency***: 3-Medium
- Priority**: Low
- Risk Level***: Risk Level 3

NOTE

Release managers can also choose to override the calculation and specify a different Priority on the main Release form.

Configuring release rules

You use the Release Configuration Rules form to configure the method of assignment used to automatically select a release manager to assign to a release request. Each company defined in the Company form can have its own assignment rules.

You can configure assignment for one company, or you can define it for all companies using the Global option. When Release Management uses assignment (for example, when assigning a release to a release manager), the Assignment Engine first checks the assignment rules for the requester's company. If no rules are found, it then uses the rules defined for Global.

By default, the Global assignment method is according to Capacity.

► To configure release rules

- 1 In the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Advanced Options> Rules, and then click Open.

Figure 11-14: Release Configuration Rules form

- 3 From the Company list, select the company for which you want to configure assignment, or select the Global option.
Selecting Global configures assignment for all companies.
- 4 For RMS Rule Status, select Enabled.
- 5 To enable assignment, select Yes for Assignment Engine Integration (default).
- 6 From the Assignment Process Name list, select the default process for the manager assignment. The options for assigning releases to release managers are:
 - **Capacity**—Capacity in the assignment engine is a ratio-based assignment method.

- **Number**—Tracks the number of tickets assigned to the person. The number assignment process selects the release manager with the least number of tickets already assigned.
- **Round Robin**—Tracks the last time the release manager received an assignment. The round robin assignment process selects the person who was least recently assigned an incident.

For more information about configuring the assignment engine, see the sections on assignments in Chapter 8, “Configuring additional Foundation options”.

- 7 In the Require Service CI Related field, select if users must specify a Service CI (from the Service field) when creating a release request.
The options are No (the default setting) and Yes.
- 8 If you specify Yes in the Require Service CI Related field, select the milestone by which the Service CI must be related.
For example, you could configure the release rules so that users must select a Service CI during the Initiate milestone.
- 9 In the Require Scheduled Dates field, select if users must specify the scheduled start dates (in the Dates tab) when creating a release request.
The options are No (the default setting) and Yes.
- 10 If you specify Yes in the Require Scheduled Dates field, select the milestone by which the scheduled start date must be defined.
For example, you could configure the release rules so that users must enter the scheduled start date during the Initiate milestone.
- 11 In the Auto-close field, specify whether release requests are automatically closed.
The options are No and Yes (the default setting).
- 12 If you specify that release requests are automatically closed, enter the number of days a release request remains in the Close Down milestone before its status is automatically set to Closed.
The default setting is 10.
- 13 In the Action On Deployment Dates Change field, specify if users are prompted when they modify the scheduled dates on a release request.
The options are Error Message, Warning Message, or No Action. No out-of-the-box settings are provided with this field.
- 14 In the Business Hours Selection field, specify whether to use company hours or assignee hours to calculate times associated with release requests.

IMPORTANT

You must perform the Business Hours Workdays and Business Hours Holidays configuration tasks to set the company’s daily hours and holidays, as described in “Business hours and holidays” on page 100.

- 15 Click Save.

Configuring notifications for release rules

You can configure the rules in which the release manager is notified. For example, you can configure that the release manager is notified when the Milestone of a release is set to Planning and the Status is set to Planning Approval.

► To configure notifications for release rules

- 1 In the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Release Management > Advanced Options> Rules, and then click Open.
- 3 Search for a release rules record.
- 4 Click the Notification tab.

Some notification rules are automatically defined during installation.

- You can select a rule, then click View to display it or modify it, if needed.
- You can select a rule, then click Delete to remove it.

- 5 Click Add.

Figure 11-15: Release Notification Rules

- 6 Define the status of your new rule (for example, Proposed or Enabled).
- 7 Select the milestone that this notification applies to (for example, Deployment).
- 8 Select the release state for which you want the notification sent (for example, Deployment Approval).

Notifications to the release manager are configured out of the box only for the following release states:

- 9 (optional) Select a status reason.

If you select the Planning Approval status, you can include a status reason. But not all release states include status reasons.

- 10 Specify Yes for the roles that you want to notify (for example, Release Manager).
The release manager, the assignee group (as a fallback if there is no release manager), or the requester will be notified with message tags from the SYS:Notification Messages form.

NOTE

The release manager and requester are not notified if the release request is their own.

For more information, see “Customizing notification messages” on page 284.

- 11 Click Save.

Customizing notification messages

You can customize your own notification messages from the SYS:Notification Messages form. The SYS:Notification Messages form contains the notification text for each event. The combination of Notification Message Tag, Locale and Company must be unique. The Notification Message Tag is used by the notification workflow to identify the specific message to be sent. Each notification event can be associated with several notification messages.

NOTE

When customizing notification messages, do not modify the mappings until you understand the notification impact. Otherwise, your modifications can cause unexpected consequences (for example, missing modifications). You should test your modifications to make sure you are seeing the intended results.

► To create notification messages

- 1 Open the SYS:Notification Messages form in New mode.
- 2 In the Mappings section, enter all the required information.

Figure 11-16: SYS:Notification Messages form

- a Define the message tag.
Use a descriptive title. You can view and select this tag in the Rules form.
- b (optional) Enter a locale (for example, fr_FR).
- c If this message is for a company, select the company for which you want to configure the message, or select the Global option.
Selecting Global configures the message for all companies.
- d Specify the module name (for example, Release Management).
- e Specify Yes if your notification applies to a support event (for example, Release Updated).
- f Select the notification event (for example, Release Assigned).
- g Select the form name that this message applies to.
If you cannot select a form, enter a form (for example, RMS:Release).

- h In the remaining fields of the form, enter the message text.

These fields can contain literal text as well as substitution parameters (for example, #ReleaseID#). Standard filter workflow will perform a search and replace of this parameter with the actual incident ticket number.

You can use the out-of-the-box messages supplied with BMC Remedy ITSM as templates for your own messages.

- 3 Save your changes.

Your messages are now available for use in the Rules form.

Configuring activity rules

You use the Activity Configuration Rules form to configure the method of assignment used to automatically assign an activity. Each company defined in the Company form can have its own assignment rules.

You can configure assignment for one company, or you can define it for all companies using the Global option. When the Activity System uses assignment (for example, when assigning an activity), the Assignment Engine first checks the assignment rules for the requester’s company. If no rules are found, it then uses the rules defined for Global.

By default, the Global assignment method is according to Round Robin.

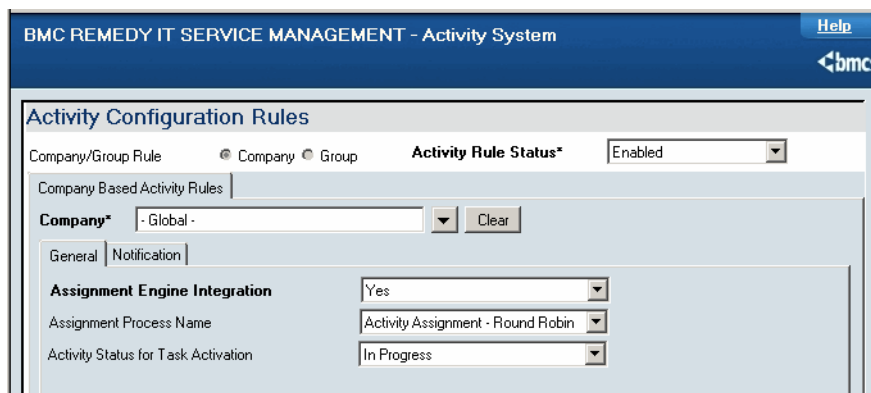
NOTE

The activity notifications process is identical to release notifications. For more information, see “Configuring notifications for release rules” on page 283.

► To configure activity rules

- 1 In the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Activity System > Configuration > Rules, and then click Open.

Figure 11-17: Activity Rules form



- 3 From the Company list, select the company for which you want to configure assignment, or select the Global option.
Selecting Global configures assignment for all companies.
- 4 To enable assignment, select Yes for Assignment Engine Integration.
- 5 From the Assignment Process list, select the default process for the assignment. The options for assigning activities are:
 - **Capacity**—Capacity in the assignment engine is a ratio-based assignment method.
 - **Number**—Tracks the number of tickets assigned to the activity user. The number assignment process selects the person with the least number of tickets already assigned.
 - **Round Robin**—Tracks the last time the activity user received an assignment. The round robin assignment process selects the person who was least recently assigned an incident.For more information about configuring the assignment engine, see the sections on assignments in Chapter 8, “Configuring additional Foundation options”.
- 6 For Activity Rule Status, select Enabled.
- 7 Click Save.

Chapter 12 Configuring approvals

This section is for the application administrator who configures approvals to work with BMC Remedy Change Management, the Release Management module, and BMC Remedy Asset Management. Configuration tasks are performed from the Application Administration Console. This section also describes how approvals are used with BMC Remedy Change Management, for example, how you can configure approvals to work with configuration items (CIs) and impacted areas (IAs).

The following topics are provided:

- Approval process overview (page 290)
- Configuring approvals with BMC Remedy Change Management—Quick Start (page 290)
- Permissions and roles required to configure change management approvals (page 298)
- Configuring change management approvals (page 299)
- Change states and approval phases (page 299)
- BMC Remedy Change Management approval state transitions (page 305)
- Understanding the relationship between company and global approval process configuration (page 315)
- Creating people and mapping roles for approvals (page 329)
- Change Management approver mappings (page 330)
- How approvals work with change requests (page 356)
- Release Management approver mappings (page 359)

Approval process overview

The approval process is used by BMC Remedy Asset Management for purchase requisitions, and by BMC Remedy Change Management for change requests and release requests.

- When you install BMC Remedy Asset Management, an ad hoc approval process is mapped for you. Go to the AP:Administration form to learn more about the Purchase Requisition process that is linked to the AST:PurchaseRequisition form. For more information, see “Viewing approval processes in the Approval Server (advanced information)” on page 314.
- When you install BMC Remedy Change Management, “best practice” approval processes are installed for you. Most companies do not need additional processes.

These global approvals define which state occurs after an approval is approved or rejected or if no approvers are defined.

IMPORTANT

Do *not* modify the default approval process configuration records. If you need additional processes, create new configuration records. Custom configuration records take precedence over default records. *Read this entire section carefully before you attempt to create and configure new approval processes.*

Configuring approvals with BMC Remedy Change Management—Quick Start

To get approvals up and running quickly with BMC Remedy Change Management, the application administrator must perform the following steps. You should find this overview section helpful *before* you dig into the details of how the BMC Remedy Approval Server (Approval Server) works with the BMC Remedy Change Management application.

NOTE

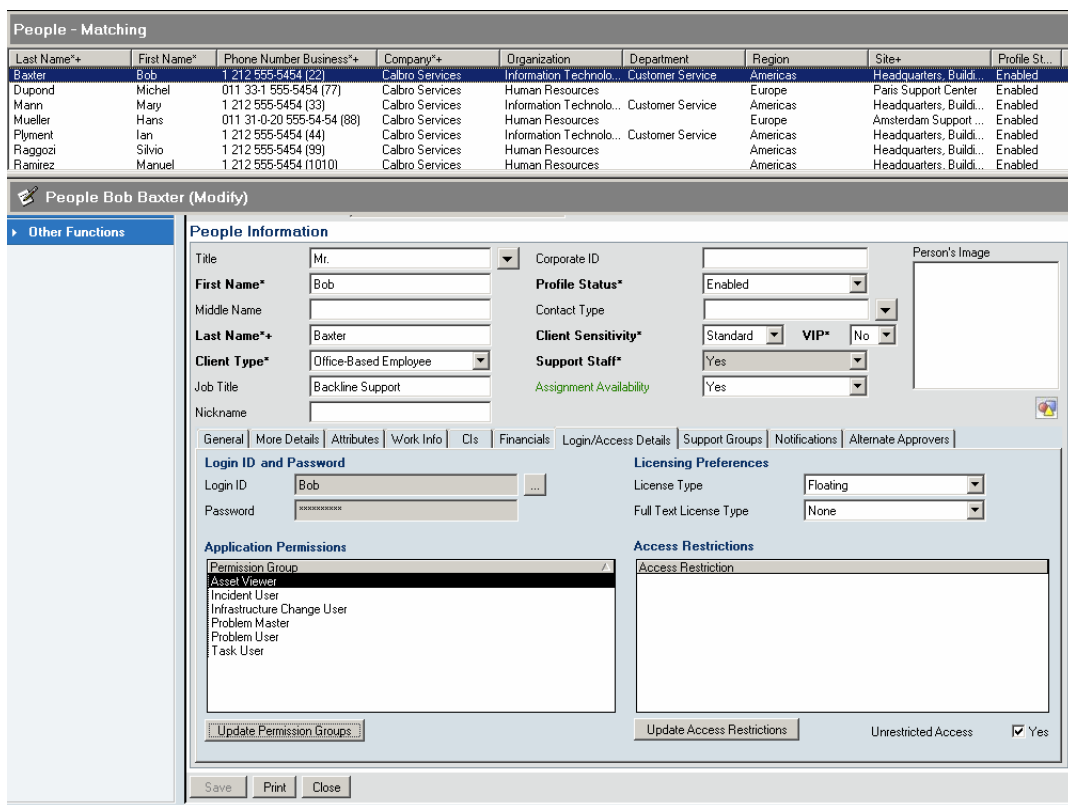
This section assumes you already know how to log in to the BMC Remedy AR System server, open the IT Home page, create a change request, and so on.

Table 12-1: Quick start to approvals in BMC Remedy Change Management

Step	Action	Menu Item	Comments
1	Configure approvers in the People form.	Custom Configuration > Foundation > People > People	For detailed information, see “Configuring people information” on page 105.
2	Review the approval process configuration records that are installed by default for global use.	Custom Configuration > Foundation > Advanced Options > Approval Process Configuration	For more information, see “BMC Remedy Change Management approval state transitions” on page 305.
3	Review the states in the change request that drive the approval process.		For more information, see “Approval states on the Status Flow tab” on page 323.
4	Map approvers to the global approval process configuration records.	Custom Configuration > Change Management > Approval > Approval Mappings	For more information, see “Change Management approver mappings” on page 330.
5	Create a change request, and move it through its various approval phases.		For detailed information, see the <i>BMC Remedy Change Management User’s Guide</i> .
6	Approve the change request.		
7	Review the status of the change request after it is approved.		

Step 1 Configure your approvers in the People form. (In the Application Administration Console, choose Custom Configuration > Foundation > People > People.)

Figure 12-1: Configuring approvers in the People form



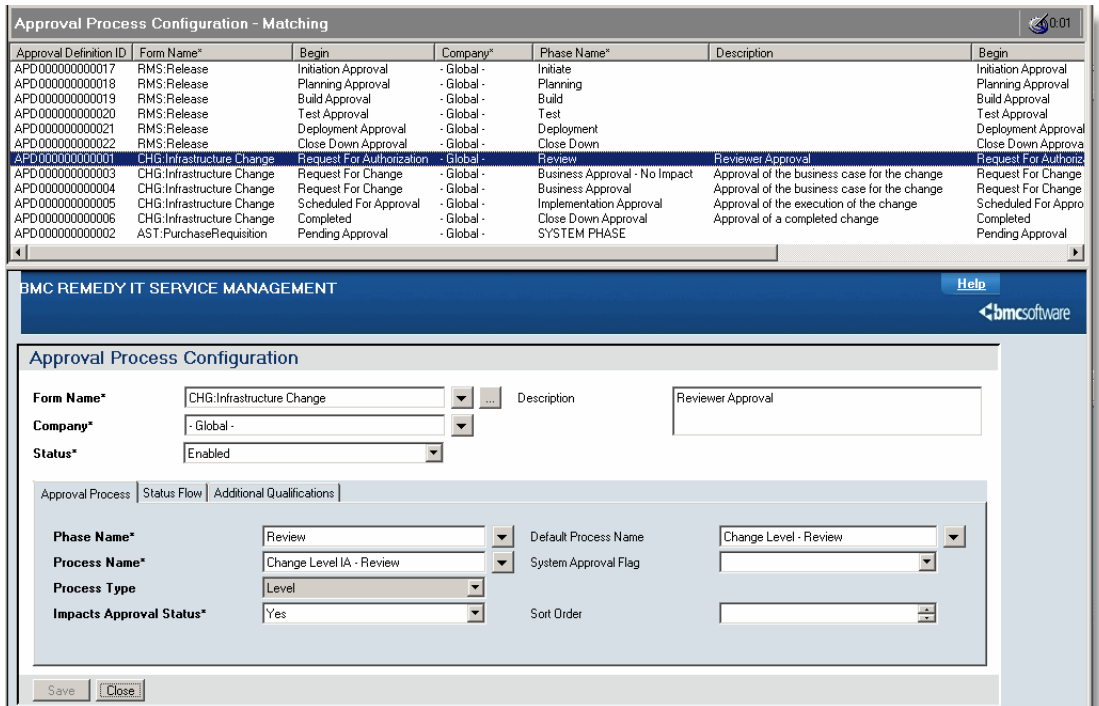
NOTE

Support group membership and the Infrastructure Change Approval functional role (defined in the Support Groups tab) are required only for group approvals (rather than individual approvers). For more information, see “Creating group mappings (for BMC Remedy Change Management)” on page 348.

For more information, see “Creating people and mapping roles for approvals” on page 329. See also “Configuring people information” on page 105.

- Step 2** Review the approval process configuration records that are installed by default for global use. (In the Application Administration Console, choose Custom Configuration > Foundation > Advanced Options > Approval Process Configuration.)

Figure 12-2: Reviewing the global approval process configuration records



The configuration records are enabled by default. These global configuration records specify which change status occurs next if an approval is approved or rejected, or if no approvers are defined.

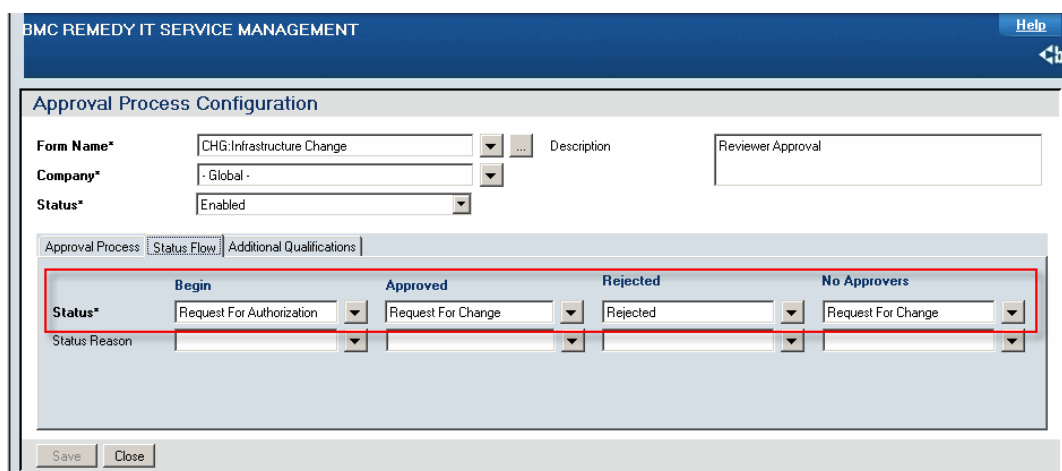
NOTE

Here you are *not* customizing the approval process configuration records or creating new configuration records from scratch.

For more information, see “Default global approval processes” on page 309.

- Step 3** Click the Status Flow tab in the approval process configuration records to review the change states that drive the approval process.

Figure 12-3: Reviewing the status flow of the approval process configuration record



For example, in Figure 12-3, you see the Review global configuration record defines four different approval actions and resulting change states that drive the progress of the change request.

Table 12-2: Approval and change request states

Approval state	Change request status	Approval Server action to the change request
Begin	Request For Authorization	When the Status of the change request is Request For Authorization, the approval process starts.
Approved	Request For Change	If the change request is approved, its Status becomes Request For Change.
Rejected	Rejected	If the change request is rejected, its Status changes to Rejected.
No Approvers	No Approvers	If there are no approvers defined for the change (that is, if no approvers are mapped to this configuration record), its Status changes to Request For Change.

For more information, see “Approval states on the Status Flow tab” on page 323.

- Step 4** Map your approvers to the global approval process configuration records. (In the Application Administration Console, choose Custom Configuration > Change Management > Approval > Approval Mappings.)

Figure 12-4: Mapping approvers

The screenshot shows the 'Approval Mappings (New)' form in BMC Remedy IT Service Management. The form is titled 'Approver Mappings' and contains the following fields:

- Approval For*:** Individual
- Approval Indicator*:** Change
- First Name:** Mary
- Last Name*:** Mann (highlighted with a red box)
- Phase Company*:** - Global -
- Phase Name*:** Review (highlighted with a red box)
- Approvers ID:** Mary
- Assignment Availability:** Yes
- Submitter*:** appadmin
- Status*:** Enabled
- Level*:** 0
- Description:** (empty text area)

Below the main form is an 'Additional Mappings' section, which is currently empty.

No approver mappings are provided by default with BMC Remedy Change Management. If you do not create any approver mappings, users move the change request through the entire change management lifecycle without encountering any approvals. If users encounter an approval phase, they can simply refresh the change request to move automatically to the next stage in the lifecycle.

— **IMPORTANT** —

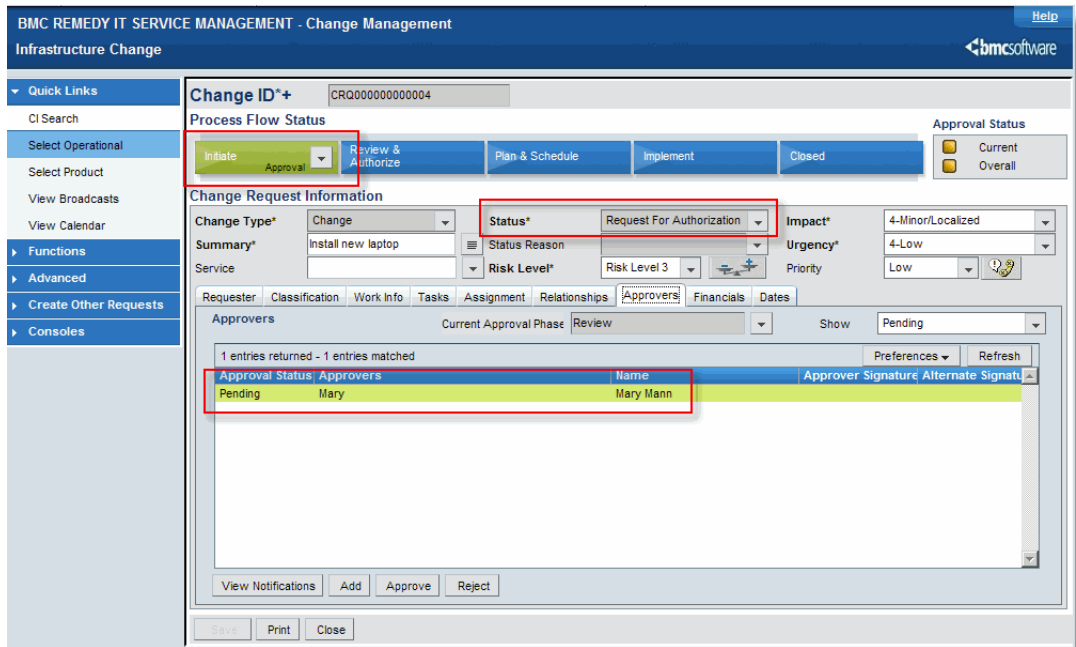
Enter only the minimum values (shown in the red areas in Figure 12-4) needed to create the approver mappings. To enter values in the Additional Mappings area, *carefully* read “Change Management approver mappings” on page 330 to understand the purposes of these fields and how they are used.

- a Enter Mann in the Last Name field and then press Enter.
Mary Mann is part of the Calbro Service sample data.
- b Choose Global > Review as the Phase Name.
- c Ignore the remaining fields on the Approver Mappings form.
- d Save your changes.

If you correctly mapped the approvers to the approval process configuration record, you will see the approver in the Approvers tab when the change request reaches the Request For Authorization status, as shown in Figure 12-5.

Step 5 Create a change request, and then use the Process Flow Status wizard to work the change request through its various approval phases.

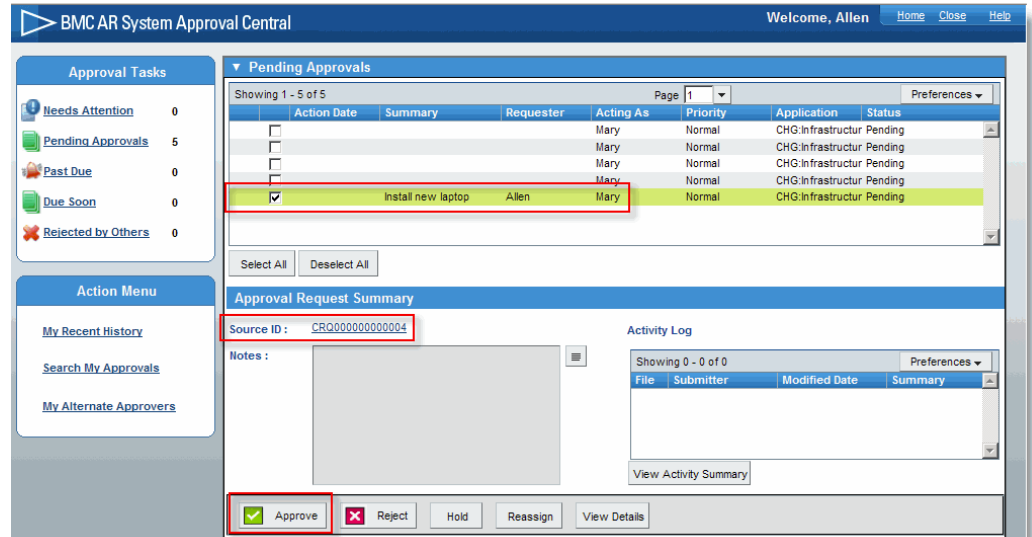
Figure 12-5: Viewing important approval information in a change request



- a Log in to BMC Remedy Change Management.
- b Create a change request and assign it to a specific support group in your company.
- c Use the Process Flow Status bar to move the change request to the Request For Authorization status.

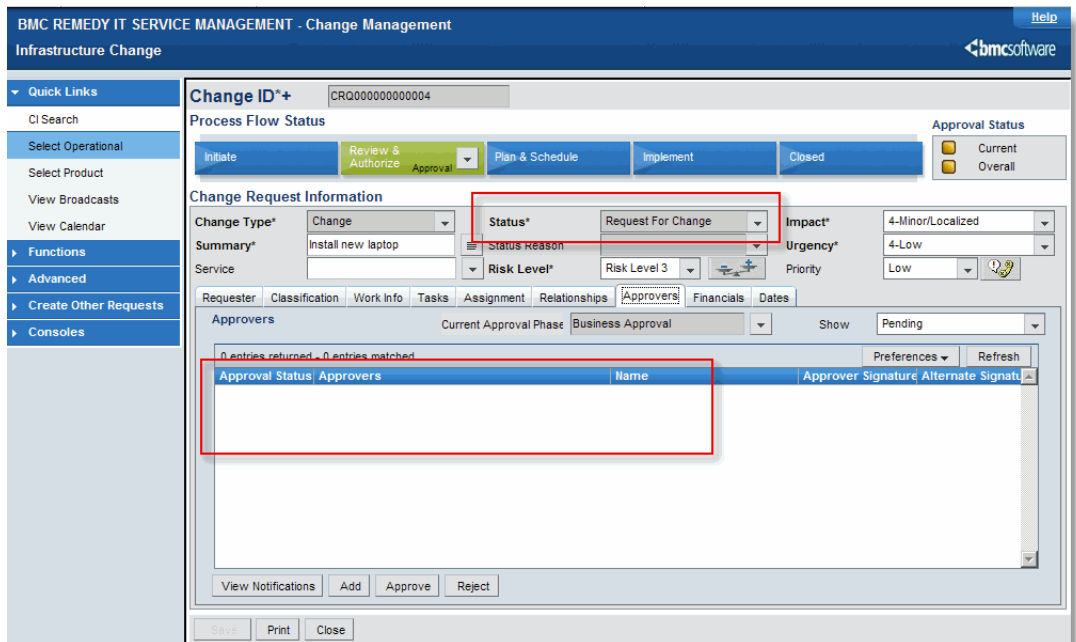
Step 6 As Mary Mann, log in to the BMC Remedy AR System server as the approver in a browser or user tool, open Approval Central from the IT Home page, and then approve the change request.

Figure 12-6: Approving the change request in Approval Central



Step 7 Return to the change request, and then refresh it.

Figure 12-7: Flow of change request after approval



The Status of the change request (as shown in Figure 12-7) moves to Request For Change. This behavior of the change request is exactly as described in Table 12-2 on page 294. By default, when a change request in the Request For Authorization status is approved, it moves to the Request For Change status. Since you did not map any approvers to the Business Approval phase, no approvers are listed in the Approvals table. You now work the change request to Closed status without seeing additional approvals.

This last step now concludes the Quick Start section.

Permissions and roles required to configure change management approvals

Configuring approvals with BMC Remedy Change Management requires various permissions and roles.

Table 12-3: Configuring approvals

Step	Description	Permissions required
Setting up approval process configuration records for your company (page 317)	Use the Approval Process Configuration form (Foundation > Advanced Options > Approval Process Configuration) to connect the approval process configuration records to companies by phase.	<ul style="list-style-type: none"> ■ Infrastructure Change Config permissions ■ Approval Admin permissions optional if you require administrative access to the Approval Server configuration forms (AP:Administration)
Creating people and mapping roles for approvals (page 329)	Use the People form (Foundation > People > People) to define people and support groups.	Contact Organization Admin
Change Management approver mappings (page 330)	Use the Approval Mappings form (Change Management > Approval > Approval Mappings) to set up approver mappings for the different phases. Includes step-by-step instructions on creating individual and group approver mappings.	<p>One of the following permissions is required to access this form:</p> <ul style="list-style-type: none"> ■ Infrastructure Change Master permissions ■ Contact Organization Admin ■ Contact Support Admin ■ Requester Console Master ■ Approval Admin permissions optional if you require administrative access to the Approval Server configuration forms (AP:Administration)

For general information on configuration, see “Getting started” on page 25.

Configuring change management approvals



BMC Remedy BMC Remedy ITSM is shipped with best practice approval process configuration records that are predefined and loaded for you with the application. The approval process configuration records for managing change requests are tightly integrated with the Approval Server. The Approval Server is shipped with the BMC Remedy AR System Server and should be installed on the same machine as BMC Remedy ITSM.

NOTE

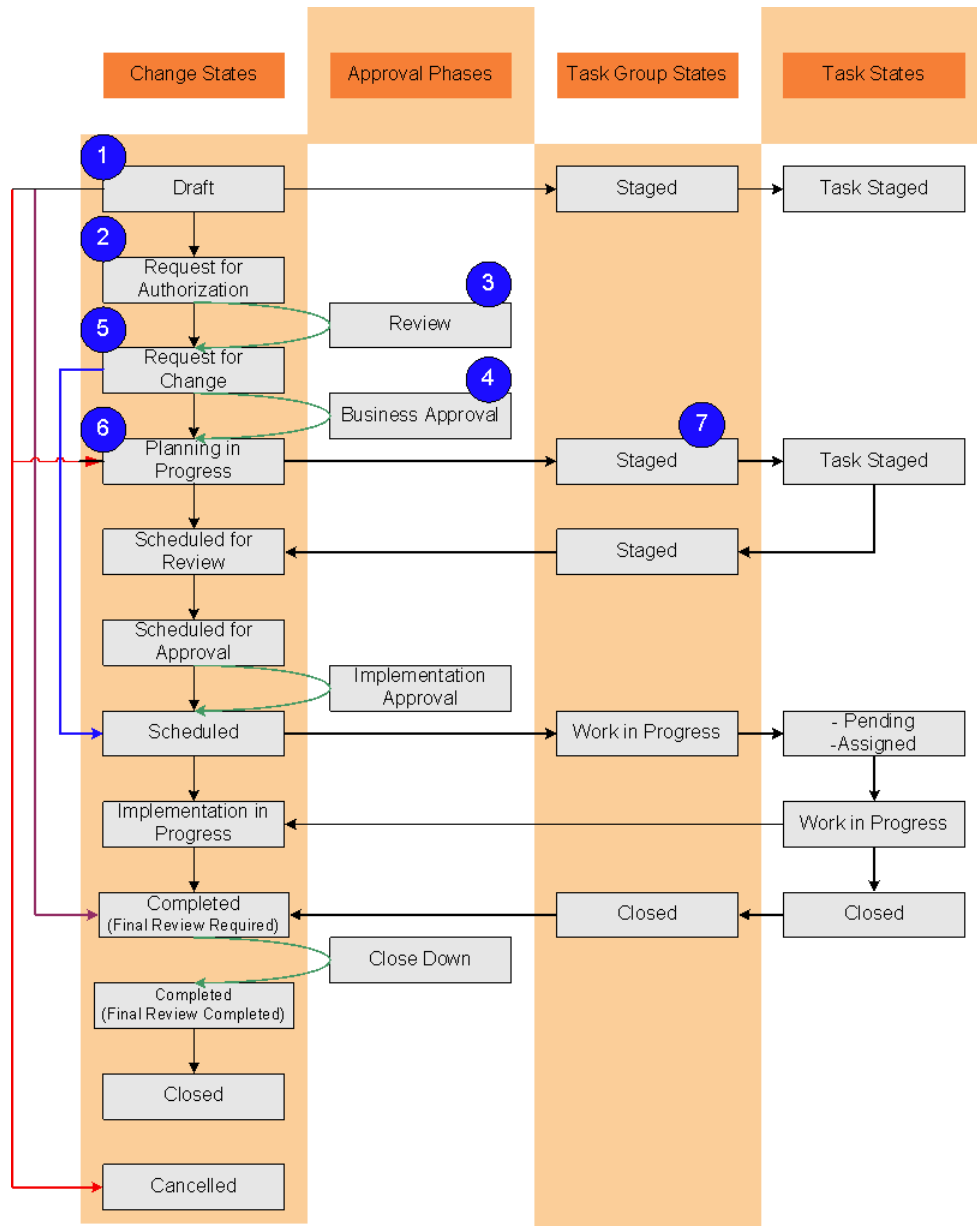
You can create additional approval process configuration records and adapt them to your business process instead of creating new ones from scratch.

To manage your change request approval process, you must understand at a high-level the different state transitions that a change request must pass through, map approval processes to approval phases, and define approvers for each phase.

Change states and approval phases

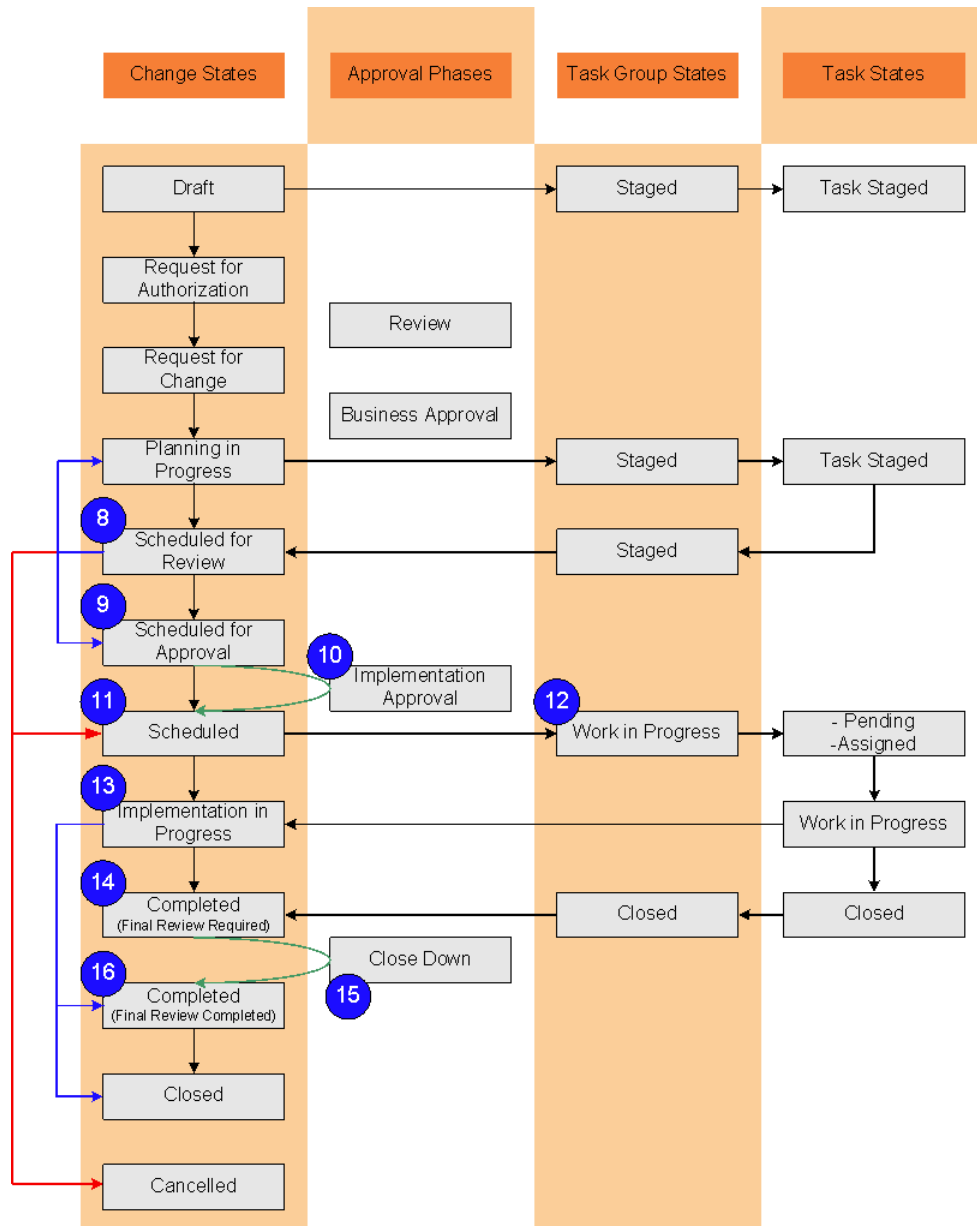
The approval phases in the change state diagrams follow the default process configuration flow used for “global” settings. The following diagrams help you follow the flow of a change request from the Draft status to the Closed status.

Figure 12-8: State transitions—Steps 1 to 7



-
- Step 1** A change request starts in the Draft status. Any related task groups or tasks are in the Staged status.
- Step 2** When the change moves through the process flow:
- If approvers are mapped to the Review approval phase, the change remains in the Request for Authorization status.
 - If no approvers are mapped, the change moves to the Request for Change status and requires the Change Manager or Change Assignee to move it forward.
 - If the Timing of the change is Latent, it moves to the Completed status.
- Step 3** The Review approval phase requires that the change be approved before it can move forward. If the change is approved, it moves to the Request for Change status.
- Step 4** If no approvers are mapped to the Business Approval phase, the change moves to the Planning in Progress status and requires the Change Manager or Change Assignee to move it forward.
- By default, No Impact changes follow the Business Approval - No Impact phase and move forward to the Scheduled status.
- Step 5** The Business Approval phase requires that the change be approved before it can move forward.
- If the change is approved, it moves to the Planning in Progress status.
 - If the change is rejected, it moves to the Rejected status.
 - If the request is canceled, it moves to the Canceled status.
- Step 6** When the Change Manager or Change Assignee add dates to the change, or when the Status Reason of all the tasks has been marked as Staging Complete, the change moves to the Scheduled for Review status.
- Step 7** Task assignees are notified that the task or tasks are set to staged.

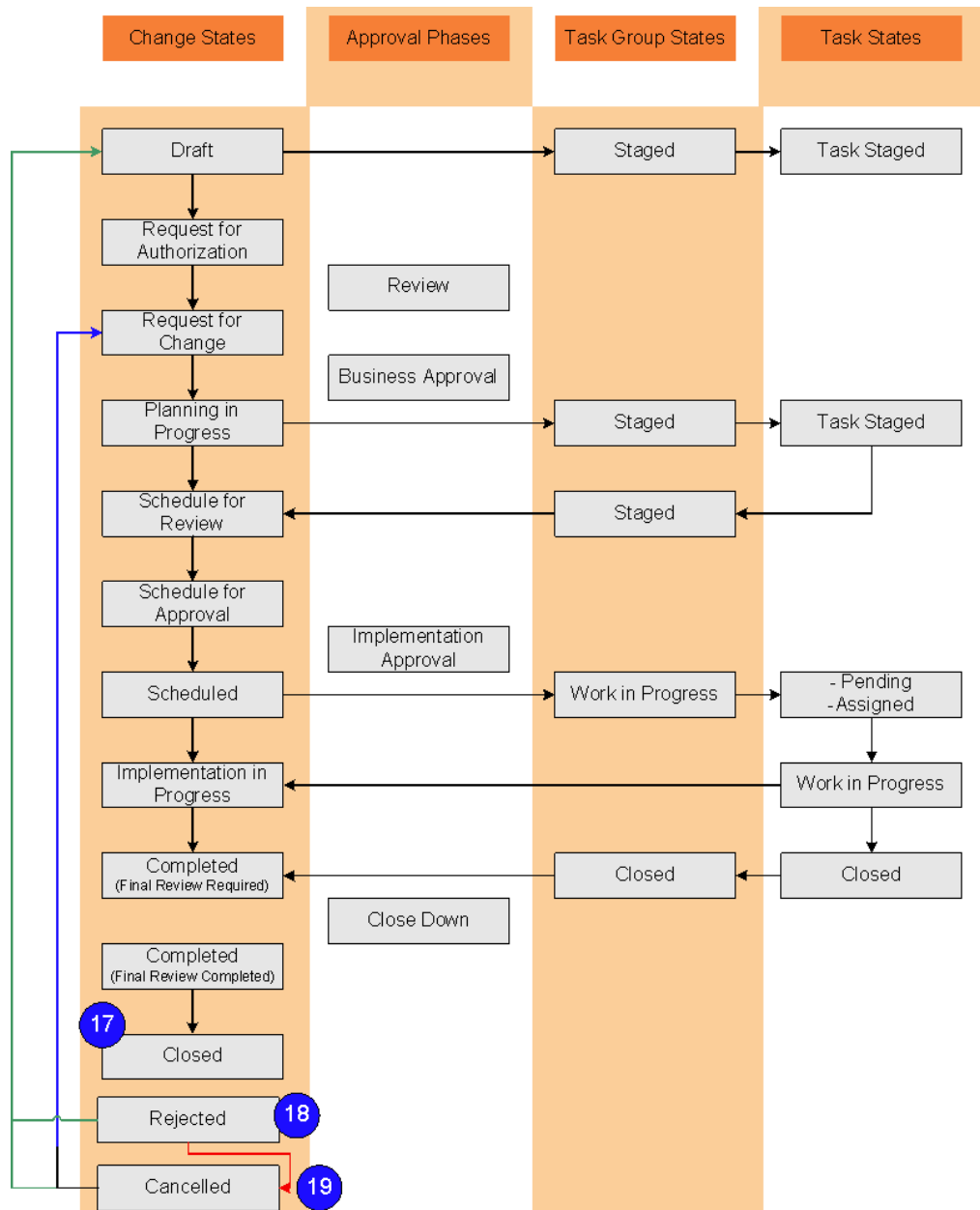
Figure 12-9: State transitions—Steps 8 to 16



- Step 8** Change Manager or Change Assignee can move the change to the Schedule for Approval status, cancel it, or move it back to the Planning in Progress status.
- Step 9** The change remains in the Scheduled for Approval status if there are approvers in the Implementation Approval phase. If no approvers are mapped to the phase, the change moves to the Scheduled status and requires the Change Manager or Change Assignee to move it forward.
- Step 10** If the change is approved, it moves to the Scheduled status. Change Manager and Change Assignee can approve the change on behalf of approvers, if they are defined as alternates.

- Step 11** Change Manager or the Change Assignee must move the change to the Implementation in Progress status. For taskless changes only, the Change Implementer is notified.
- Step 12** When the Change Manager or Change Assignee move the change into the Implementation in Progress status, the task group is set to Work in Progress and the first task is set to Pending or Assigned.
- Step 13** Task implementers can start work on tasks. When all tasks are marked Closed, Change Manager or Change Assignee enter information into Actual Start Date, Actual End Date, and Performance Rating fields to move the change to the Completed status.
- If the Status Reason is set to Final Review Complete, the change moves to Completed status. If the Status Reason is set to Final Review Required, the change moves to Close Down Approval phase.
- Step 14** After last task is marked as Closed, task group is set to Closed. Change manager, Change Assignee, and change requester are notified that change is completed. Change automatically moves to Completed (Final Review Required) status when all tasks are completed and there are approvers for Close Down Approval phase. Change managers and Change Assignees can approve change on behalf of approvers if they are defined as alternates.
- Step 15** Approval group or approvers are notified that change requests require approval for Close Down Approval phase. Change is placed in Completed status with status reason of Final Review Required. If approved, Status Reason is automatically updated to Final Review Complete. If no approvers are mapped to the Close Down Approval phase, the change moves to the Completed status.
- Step 16** Change manager or Change Assignee is notified when final review is completed. Change moves to Completed (Final Review Complete) status if all tasks are completed or if there are *no* approvers for the Close Down Approval phase.

Figure 12-10: State transitions—Steps 17 to 19



- Step 17** After the final review is completed, Change Manager or Change Assignee moves the change request into the Closed status and its Status Reason is Successful.
- Step 18** If a change has been rejected, it can be restarted using the Process Flow Status wizard. The change requester is notified of the rescheduled change.
- Step 19** If change request is canceled, requester is notified.
- If a change request is canceled, all the task groups and tasks associated with the change are canceled as well.
 - If a task group is canceled, all its tasks are canceled.

BMC Remedy Change Management approval state transitions

When a change request moves from status to status, the default workflow on the change request queries the Approval Process Configuration form to find out which approval process to use, and then executes it.

- If approval processes have been defined for a particular company, they are used and the approval process continues. (For more information, see “Understanding the relationship between company and global approval process configuration” on page 315.)
- Otherwise, the default global approval processes are used and the approval process continues.

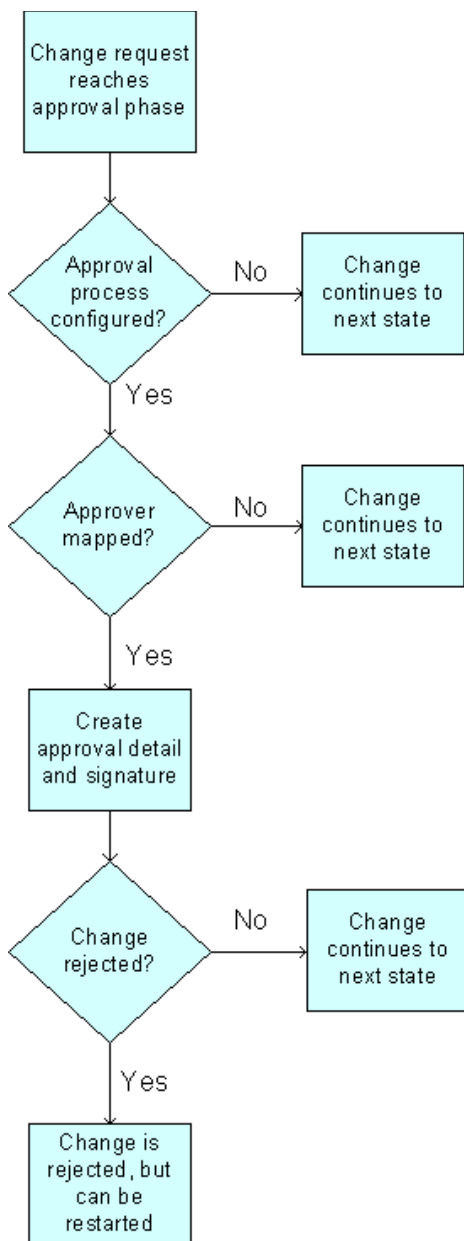
For example, when a change request moves from the Draft status into the Review phase, the Approval Server checks the Review approval process (Change Level IA - Review), one of the five approval processes enabled by default to work with BMC Remedy Change Management.

NOTE

For a list of default approvals shipped with BMC Remedy Change Management, see “Default global approval processes” on page 309.

The Approval Server starts the approval process, and then executes the rules in the order of the approvers who are mapped to the approval phase.

Figure 12-11: Change approval process



The rules contain the qualifications that set up approvers for each phase of that process, and create the approval detail and signature records for the change.

If there are no approvers mapped to the Review process, the change request moves to the next phase (Business Approval).

You must set up the approvers using the Approver Mappings form, as described in “Change Management approver mappings” on page 330. The rules query this form, using the appropriate criteria, find the appropriate approvers, and then add them to the change request record as the approvers. (You can view the approvers on the Approvers tab of the change request.)

When the approver approves or rejects the change request, the rules again execute and sets the next status defined in the Approval Process Configuration form. (See “Approval states on the Status Flow tab” on page 323.) Based on the process type, the approval server continues until there are no approvers found for the process.

If the process is a level process type, then the Approval Server first sends the change request to the current level approvers. After the request or offering is approved, the Approval Server sends it to the next level of approvers. On the Approvers tab, only the current level of approvers are displayed even if approvers are specified for several levels.

NOTE

You can configure additional processes for your company, as needed. For example, you could create a process that change requests require approvals when they reach the Planning in Progress status. For more information, see “Setting up approval process configuration records for your company” on page 317.

Approval process types

For detailed information about defining the approval processes and rules in the BMC Remedy Approval Server, see the *BMC Remedy Action Request System BMC Remedy Approval Server Guide*.

BMC Remedy Change Management and the Release Management module provides the following approval process types:

- **Ad Hoc**—Provides routing authority to each approver without requiring the administrator to create approver mappings for every individual or group. The Change Ad Hoc approval process is used in the No Impact Business Approval phase with the Change Manager login as the first approver.
- **Level**—Associates individual approvers, or groups of approvers, with impacted areas or configuration items (CIs).
- **Parent-Child**—Uses the Requested For manager as the approver. If you configure an approval process that includes the Change Management Chain process, it uses the Requested For manager as the approver. If the Requested For fields are not filled in (on the Change form under the Requester tab), the approval server bypasses the Change Management Chain process.

If you configure an approval process that includes the Release Management Chain process, it uses the manager of the Release Requester (on the General tab of the Release form) as the approver.

NOTE

Rule-based approvals are not included by default in BMC Remedy Change Management.

For example, in the Change Management Chain process, if Joe Unser in HR wanted to upgrade the operating system on his computer and created a change request that required the Change Management Chain approval process, it would be sent to Joe's manager for approval. Joe's manager is not a member of the IT organization, and therefore might not be aware of additional issues surrounding Joe's request. This process is workflow-driven, triggered from the manager data stored in the People form.

Figure 12-12: Change Management Chain approval process

The screenshot shows the 'Approval Process Configuration' form in BMC Remedy IT Service Management. The form is titled 'Approval Process Configuration' and includes the following fields:

- Form Name***: CHG:Infrastructure Change
- Company***: Calbro Services
- Status***: Proposed
- Phase Name***: Close Down Approval
- Process Name***: Change Management Chain (highlighted with a red box)
- Process Type**: Parent-Child
- Impacts Approval Status***: Yes
- Default Process Name**: (empty)
- System Approval Flag**: (empty)
- Max Approval Levels**: 1 (highlighted with a red box)
- Sort Order**: (empty)

If you select the Change Management Chain process, the Max Approval Levels field appears in the Approval Process Configuration form, as shown in Figure 12-12. You can specify how deep you want to go in the management chain. For example, if you enter 1, the chain extends only to Joe's manager. If you enter 2, the manager of Joe's manager must approve the upgrade, and so on.

NOTE

For BMC Remedy Change Management, you are allowed only one record per company with the process type of Parent-Child. If an administrator attempts to create a second approval phase with the Change Management Chain (Parent-Child) process type selected, the following error message is displayed: Only one 'Approval Phase' for '\$Company\$' can be set to use the 'Parent-Child' 'Process Type'.

In addition, you should use only one unique approval process record per phase. Otherwise, your approvals will not work as expected. For more information, see "Setting up approval process configuration records for your company" on page 317.

Default global approval processes



BMC Remedy ITSM ships with default approval processes designed for global use. These “best practice” approval processes are already defined for you by default. These global configuration records specify which status occurs next if an approval is approved or rejected, or if no approvers are defined. The preconfigured approval processes are as follows:

Table 12-4: Preconfigured approval phases and processes for BMC Remedy Change Management

Approval Phase	Process	Definition
Review	Change Level IA - Review	<p>Used with Impacted Areas on the Approver Mappings form. This level approval process occurs when the change reaches the Review phase.</p> <ul style="list-style-type: none"> ■ If approved, the change moves to the Business Approval phase. ■ If no approvers are mapped, the change moves directly to the Business Approval phase and requires the Change Manager or the Change Assignee to move the change forward. <p>By default, the status of this approval process for this phase is Enabled.</p>
Business Approval - No Impact	Change - Ad Hoc	<p>By default, this Ad Hoc approval process applies only to changes with a Timing setting of No Impact. However, you could use this process with any approval phase.</p> <p>When the change moves through the process flow and Change Manager approves the change in the Business Approval - No Impact phase, it then moves to the Scheduled status.</p> <p>You use this process for pre-approved No Impact changes where the change is automatically scheduled after the approval phase is satisfied.</p> <p>By default, the status of this approval process for this phase is Enabled.</p> <p>For more information, see “Configuring additional No Impact processes (optional)” on page 327.</p>
Business Approval	Change Level IA - Business	<p>Used with Impacted Areas on the Approver Mappings form. This level approval process occurs when the change reaches the Business Approval phase.</p> <ul style="list-style-type: none"> ■ If approved, the change moves to the Planning In Progress status. ■ If no approvers are mapped, the change moves to the Planning in Progress status and requires the Change Manager or Change Assignee to move the change forward. <p>By default, the status of this approval process for this phase is Enabled.</p>

Table 12-4: Preconfigured approval phases and processes for BMC Remedy Change Management (Continued)

Approval Phase	Process	Definition
Implementation Approval	Change Level IA - Implementation	Used with Impacted Areas on the Approver Mappings form. This level approval process occurs when the change reaches the Implementation Approval phase. <ul style="list-style-type: none"> ■ If approved, the change moves to the Scheduled status. ■ If no approvers are mapped, the change moves to the Scheduled status and requires the Change Manager or Change Assignee to move the change forward. By default, the status of this approval process for this phase is Enabled .
Close Down Approval	Change Level IA - Close Down	Used with Impacted Areas on the Approver Mappings form. This level approval process occurs when the change reaches the Close Down Approval phase. <ul style="list-style-type: none"> ■ If the change is approved, the change moves to the Completed status and the Status Reason is automatically updated to Final Review Complete. ■ If no approvers are mapped, the change moves to the Completed status and the Status Reason remains as Final Review Required. By default, the status of this approval process for this phase is Enabled .

BMC Remedy Change Management also includes approval processes for general changes and changes associated with CIs, as described in Table 12-5. To use them, you can modify existing process configuration records to Change Level CI processes for global use or for a specific company.

See “Setting up approval process configuration records for your company” on page 317.

Table 12-5: Additional approval phases and processes

Approval Phase	Process	Works with which approver mappings
Review	Change Level - Review	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
	Change Level CI - Review	Used with configuration items (Impacted Area/CI tab) on the Approver Mappings form.
Business Approval	Change Level - Business	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
	Change Level CI - Business	Used with configuration items (Impacted Area/CI tab) on the Approver Mappings form.
Implementation Approval	Change Level - Implementation	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
	Change Level CI - Implementation	Used with configuration items (Impacted Area/CI tab) on the Approver Mappings form.

Table 12-5: Additional approval phases and processes (Continued)

Approval Phase	Process	Works with which approver mappings
Close Down Approval	Change Level - Close Down	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
Close Down Approval	Change Level CI - Close Down	Used with configuration items (Impacted Area/CI tab) on the Approver Mappings form.
Any phase	Change Management Chain	The Parent-Child process type uses the Requested For's manager as the approver.

When you configure these additional approval processes for use, you should modify your corresponding approver mappings as well. For example, if you create a CI approval process, you must also set a CI name or CI type in the approval mapping.

For more information, see the following procedures:

- “Configuring approvals for CI changes” on page 324
- “Change Management approver mappings” on page 330

Default global approval processes for Release Management

Release Management is installed with default approval processes designed out-of-the-box for global use. The preconfigured approval processes are as follows:

Table 12-6: Preconfigured approval phases and processes for Release Management

Approval Phase	Process	Definition
Initiate	Release Level CI - Initiate	<p>Used with Configuration Item on the Approver Mappings form. This level approval process occurs when the change reaches the Review phase.</p> <ul style="list-style-type: none"> ■ If approved, the change moves to the Business Approval phase. ■ If no approvers are mapped, the change moves directly to the Business Approval phase and requires the Change Manager or the Change Assignee to move the change forward. <p>By default, the status of this approval process for this phase is Enabled.</p>

Table 12-6: Preconfigured approval phases and processes for Release Management (Continued)

Approval Phase	Process	Definition
Planning	Release Level CI - Planning	<p>Used with Configuration Item on the Approver Mappings form. The Planning phase starts when the release request is placed in Planning Approval status.</p> <ul style="list-style-type: none"> ■ If the release request is approved, it moves to the In Progress status. ■ If no approvers are mapped to the Planning phase, the release request moves to the In Progress status and requires the release manager to move the request forward. ■ If the request is rejected, it moves to the Rejected status. <p>By default, the status of this approval process for this phase is Enabled.</p>
Build	Release Level CI - Build	<p>Used with Configuration Item on the Approver Mappings form. The Build phase starts when the release request is placed in Build Approval status.</p> <ul style="list-style-type: none"> ■ If the release request is approved, it moves to the In Progress status. ■ If no approvers are mapped to the Build phase, the release request moves to the In Progress status and requires the release manager to move the request forward. ■ If the request is rejected, it moves to the Rejected status. <p>By default, the status of this approval process for this phase is Enabled.</p>
Test	Release Level CI - Test	<p>Used with Configuration Item on the Approver Mappings form. The Test phase starts when the release request is placed in Test Approval status.</p> <ul style="list-style-type: none"> ■ If the release request is approved, it moves to the In Progress status. ■ If no approvers are mapped to the Test phase, the release request moves to the In Progress status and requires the release manager to move the request forward. ■ If the request is rejected, it moves to the Rejected status. <p>By default, the status of this approval process for this phase is Enabled.</p>
Deployment	Release Level CI - Deployment	<p>Used with Configuration Item on the Approver Mappings form. The Deployment phase starts when the release request is placed in Deployment Approval status.</p> <ul style="list-style-type: none"> ■ If the release request is approved, it moves to the In Progress status. ■ If no approvers are mapped to the Deployment phase, the release request moves to the In Progress status and requires the release manager to move the request forward. ■ If the request is rejected, it moves to the Rejected status. <p>By default, the status of this approval process for this phase is Enabled.</p>

Table 12-6: Preconfigured approval phases and processes for Release Management (Continued)

Approval Phase	Process	Definition
Close Down	Release Level CI - Close Down	<p>Used with Configuration Item on the Approver Mappings form. The Close Down phase starts when the release request is placed in Close Down Approval status.</p> <ul style="list-style-type: none"> ■ If the release request is approved, it moves to the Completed status. ■ If no approvers are mapped to the Close Down phase, the release request moves to the Completed status. ■ If the request is rejected, it moves to the Rejected status. <p>By default, the status of this approval process for this phase is Enabled.</p>

Release Management also includes approval processes for general releases and changes associated with CIs, as described in Table 12-7. To use them, you can modify existing process configuration records to Change Level CI processes for global use or for a specific company.

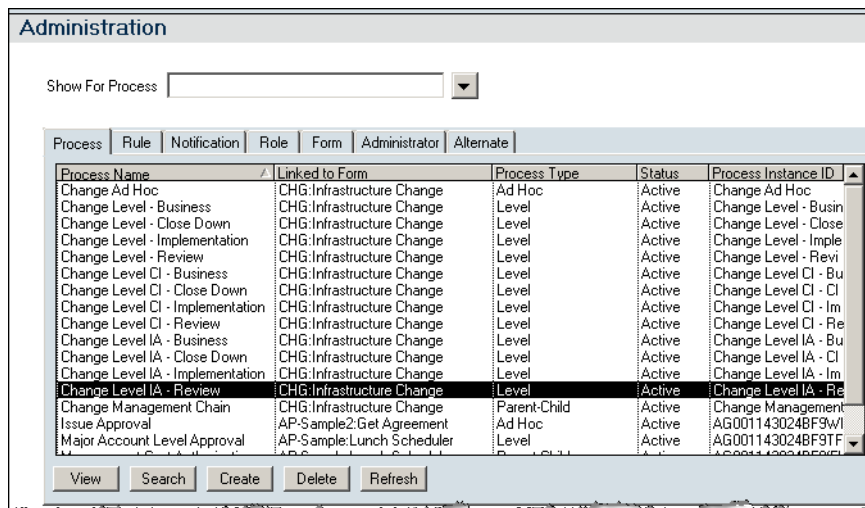
Table 12-7: Additional approval phases and processes

Approval Phase	Process	Works with which approver mappings
Initiate	Release Level - Initiate	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
Planning	Release Level - Planning	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
Build	Release Level - Build	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
Test	Release Level - Test	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
Deployment	Release Level - Deployment	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
Close Down	Release Level - Close Down	Basic approval process. Can be used with fields configured on the Categorization, Role, and Advanced Criteria tabs on the Approver Mappings form.
Any phase	Release Management Chain	The Parent-Child process type uses the manager of the release requester as the approver.
Any phase	Release Ad Hoc	<p>Provides routing authority to each approver without requiring the administrator to create approver mappings for every individual or group. The Release Ad Hoc approval process can be used in any phase.</p> <p>For Release Management, the Release Manager is the first approver.</p>

Viewing approval processes in the Approval Server (advanced information)

For a deeper understanding of how these approval processes are defined in the Approval Server, you can open the AP:Administration form and view them from the Process tab. For example, Figure 12-13 highlights the change management and asset management processes that are provided out-of-the-box. To access the AP:Process Definition form from the AP:Administration Console, click the Process tab, select a process, and then click the View button.

Figure 12-13: AP:Administration Console—Process tab



IMPORTANT

You should avoid modifying processes, rules, and roles directly in the AP:Administration form, *until* you have exhausted all the configuring options in the ITSM Foundation forms.

NOTE

You can create additional approval process configuration records and adapt them to your business process instead of creating new ones from scratch. But if necessary, you *can* create new processes and rules. For detailed information about defining additional approval processes and rules in the BMC Remedy Approval Server, see the *BMC Remedy Action Request System BMC Remedy Approval Server Guide*.

Understanding the relationship between company and global approval process configuration

The BMC Remedy Change Management application defines five default approval phases. These are designed for “global” use, and most companies should not have to create additional approval configuration records.

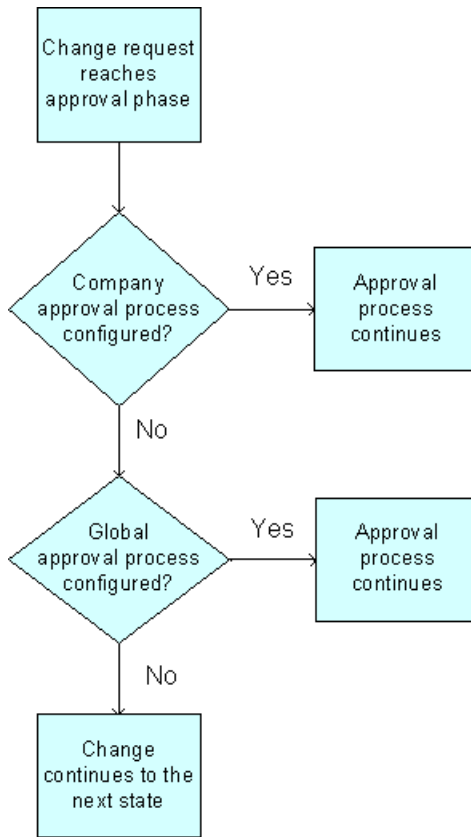
However, you *can* use the Approval Process Configuration form to create additional approval process configuration records, either for global use or for the company designated as the Change Manager support company on the Assignment tab in the change request. For example, you can create a process that bypasses the normal approval process for emergency change requests. (For more information, see “Bypassing the approval process for emergency changes” on page 326.)

IMPORTANT

Do *not* modify the global best practice phases. If you need different approval process configuration records, see the detailed instructions in “Setting up approval process configuration records for your company” on page 317.

If you create company-based approval processes, remember that these take precedence over global configuration records, as shown in Figure 12-14.

Figure 12-14: Relationship of company configuration to global configuration



When a change request reaches an approval phase, the approval server first evaluates any company configuration records you have created and the global configuration records are ignored. If there are no company configuration records, the approval server then uses the global configuration records.

Setting up approval process configuration records for your company

When you create and save a company-specific approval process configuration (for example, the Review approval process), the system automatically creates the remaining approval process configuration records for your company, based on the default global settings. You can edit these approval process configuration records as needed.

IMPORTANT

You can have only one process in a given phase. You are allowed only one *enabled* phase approval record for global use or for each company. For example, you can set up one enabled Review approval. You can create additional phase approval processes as needed, but they must be offline or in another status (for example, Proposed).

In addition, after you have created these company-specific approval process configuration records, *the global processes are no longer functional for your company*.

As a result, if you disable the Review approval process configuration record for your company and a change reaches the Review phase, the Approval Server will skip the company Review approval phase (because it is offline) *and* ignore the global Review approval phase (even if it is enabled), and the change will continue to the next status. To revert to the global configuration, you must offline *all* the company approval process configuration records.

But remember that, in a multi-tenancy environment, you can combine approval processes as needed. That is, you might decide Calbro Services needs company-specific approval processes, but DEF Company can use the default global processes.

► **To set up approval process configuration records for your company**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 Choose Foundation > Advanced Options > Approval Process Configuration, and then click Open.

The Approval Process Configuration form appears in New mode.

Figure 12-15: Approval Process Configuration form (for companies)

- 3 Enter information in the following fields:

Field Name	Action and description
Form Name	Select a form name. This is the form from where requests will be generated. For BMC Remedy ITSM, there is only one form: CHG:Infrastructure Change. You use this form to set up approvals for change requests. Depending on which ITSM applications are installed on your system, different forms are available in the list.
Company	Select the company (designated as the Change Manager support company on the Assignment tab in the change request) that will be using this approval configuration record. The Company field lets you control access within BMC Remedy Change Management. You can create a process flow for Calbro Services and a completely different flow for XYZ Company. If you select Global, the approval process applies to <i>all</i> companies. Note: BMC Remedy ITSM supports multi-tenancy, which means that you can configure different approval configuration records for different companies.

Field Name	Action and description
Status	<p>Select a status for the approval configuration record.</p> <p>The status must be set to Enabled for the approval configuration record to execute.</p> <p>If the process should not be available in BMC Remedy ITSM, you can select the appropriate status: Proposed, Offline, Obsolete, Archived, or Delete.</p>
Description	<p>Enter a description of this approval configuration record.</p>
Phase Name	<p>Indicate at which phase of the request this approval configuration record should be executed by entering text in this field.</p> <p>The phase name identifies the mapping of approval process to the company and is associated with the company for which this approval is being defined.</p> <p>Note: You can have multiple records for the same phase, <i>as long as</i> the Phase Name is unique when it is combined with the Form Name, Company, and Status. For more information, see “Configuring additional No Impact processes (optional)” on page 327.</p>
Process Name	<p>Select the process that should be used for this approval configuration record from the list of processes you configured. This process name was created in the approval server. Selecting a process automatically fills the Process Type field.</p> <p>See “Understanding the relationship between company and global approval process configuration” on page 315 for more information.</p>
Process Type	<p>A preconfigured corresponding process type appears when you select the process name. For more information, see “Default global approval processes” on page 309.</p>
Impacts Approval Status	<p>Select Yes or No to indicate whether this approval configuration record impacts the Approval Status area (in the change request).</p> <div data-bbox="614 1220 813 1373" data-label="Image"> </div> <p>This setting specifies whether this approval mapping affects the Overall approval status field on the change request where this approval mapping is used.</p>

Field Name	Action and description
Default Process Name	<p>Select a fallback process from the menu list.</p> <p>Note: This setting is optional and is limited to out-of-the-box processes. You should not set it, unless you specifically need it.</p> <p>This field only applies if it contains the basic process name, the Process Name has a CI or IA focus type of approval process, and there are no attached CI's or impacted areas to the change request. This feature provides a fallback mechanism to the basic approval process to look for criteria to establish approvers.</p> <p>If no approvers are found for the Process Name, then the Default Process Name is checked, to see if any approvers can be found.</p> <p>In Figure 12-15, the Process Name is Change Level CI - Review and the Default Process Name is Change Level - Review.</p> <p>In this example, the Change Level - Review process is the default process used <i>if</i> there is no CIs related to the change request and the Approver Mappings record. For example, if a change reaches the Review phase and has no related Configuration Item records (based on the Change Level CI - Review process), the change uses the Change Level - Review process instead.</p> <p>By contrast, if you cleared the Default Process Name field, when a change reached the Review phase and there are no related Configuration Item records, the change would not have <i>any</i> fallback processes to use. The change would then move ahead to the next status.</p>
System Approval Flag	<p>Selecting Yes means that no approvers can be mapped to this process on the Approval Mapping form. By default, this field is empty.</p> <p>Note: For an example of how you can use this flag, see "Bypassing the approval process for emergency changes" on page 326.</p>
Sort Order	<p>If you have multiple approval configuration records for the same starting criteria (the combination of Form Name, Company, and the Begin status on the Status Flow tab), you can use this field to determine which records will be found first.</p> <p>By default, the Sort Order field has a Descending order set for it. As a result, you can set a higher value for the sort order to guarantee that a specific record is found first.</p> <p>By default, two of the configuration records start with the same criteria but have a different Change Timing value.</p> <p>Depending on your database, for example, on Oracle, to guarantee that the Business Approval - No Impact is found before the Business Approval, use the following values for your the Sort Order:</p> <ul style="list-style-type: none"> ■ Set the Sort Order of the Business Approval - No Impact record to 2. ■ Set the Sort Order of the Business Approval record to 1.

- 4 Click the Status Flow tab to set up the approval cycle for the specific change request.

You use the Status Flow tab to customize an alternative process flow, for example, for the Request for Authorization status.

If you are configuring the approval cycle for a change request, then the states that appear in the Status menu lists are derived from the Status field of the change request.

Figure 12-16: Approval Process Configuration form—Status Flow tab

The screenshot displays the 'Approval Process Configuration' form in the 'Status Flow' tab. At the top, the form title is 'Approval Process Configuration'. Below this, there are fields for 'Form Name*' (CHG:Infrastructure Change), 'Company*' (Calbro Services), and 'Status*' (Enabled). A 'Description' field contains 'Reviewer Approval'. The 'Status Flow' tab is selected, showing a table with four columns: 'Begin', 'Approved', 'Rejected', and 'No Approvers'. The 'Status*' row contains dropdown menus with the following values: 'Request For Authorization' (Begin), 'Request For Change' (Approved), 'Rejected' (Rejected), and 'Request For Change' (No Approvers). Below this, the 'Status Reason' row has empty dropdown menus for each column. At the bottom of the form, there are 'Save' and 'Close' buttons.

For example, change requests start in the Draft status. The Begin column indicates the default state that starts the approval process; for change requests, this is Request for Authorization.

When the change request is submitted and moved to the next stage, the Status changes to Request For Authorization and the approval process starts (as indicated in the Begin column).

If the change request is approved, its Status changes to Request For Change (as indicated in the Approved column).

If the change request is rejected, its Status changes to Rejected (as indicated in the Rejected column).

If there are no approvers defined for the change, its Status changes to Request For Change (as indicated in the No Approver column).

- 5 To create a status flow, follow these steps:

NOTE

For more details on these approval process states, see “Approval states on the Status Flow tab” on page 323.

- a Define a status and a status reason (optional) for the Begin state.

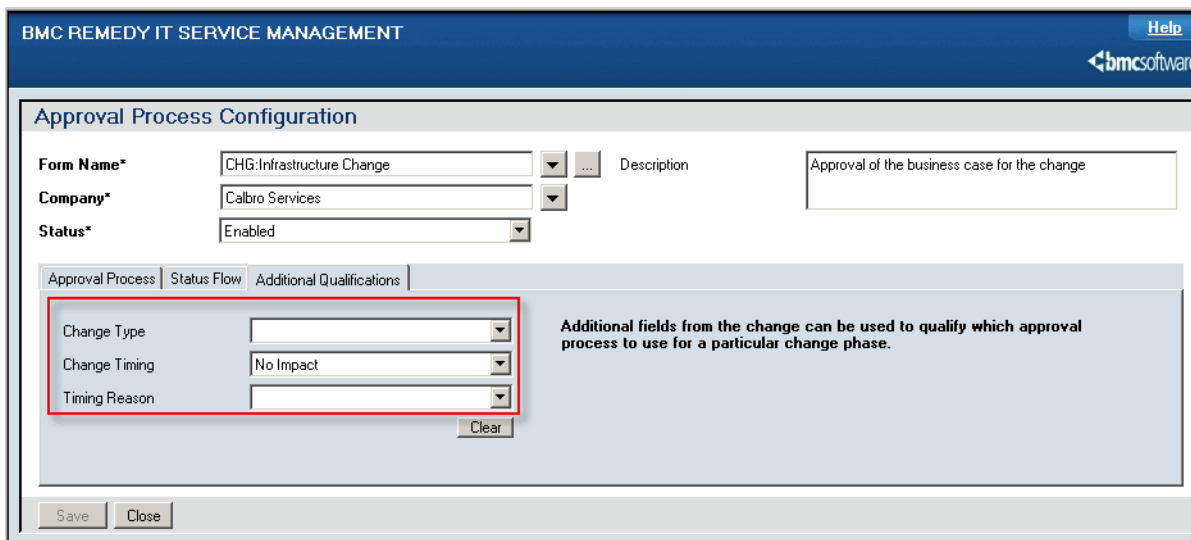
This field specifies which status starts the approval process.

- b Define a status and a status reason (optional) for the Approved state.

If the change request is approved, the approval server changes the status and status reason values on the relevant form to the values you configure here.

- c Define a status and a status reason (optional) for the Rejected state.
If the change request is rejected, the approval server changes the status and status reason values on the relevant form to the values you configure here.
 - d Define a status and a status reason (optional) for the No Approvers state.
If the approval server does not find any approvers, the approval server changes the status and status reason values on the relevant form to the values you configure here.
- 6 Click the Additional Qualifications tab.

Figure 12-17: Approval Process Configuration form—Additional Qualifications tab



To create additional qualifications in the approval process, select additional fields from the change request (or release request) to qualify the approval process for a particular approval phase. For example, the default Business Approval - No Impact process is triggered by the No Impact setting in the Timing field on the change request, as shown in Figure 12-17.

You can include other fields to qualify which approval process to use for a particular request. For BMC Remedy Change Management, you can select any combination of change type, change timing, and timing. For Release Management, you can select any combination of release type, deployment type, and business justification, as shown in Figure 12-18.

Figure 12-18: Additional Qualifications tab—Release Management

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bmcsoftware

Approval Process Configuration

Form Name* RMS:Release ... Description

Company* Global

Status* Enabled

Approval Process | Status Flow | **Additional Qualifications**

Release Type Full

Deployment Type Phased

Business Justification Sarbanes-Oxley

Additional fields from the release can be used to qualify which approval process to use for a particular release phase.

7 Click Save.

Approval states on the Status Flow tab

The states (and lifecycle) of change requests are completely dependent on the settings defined in Status and Status Reason fields on the Status Flow tab of the Approval Process Configuration form. This means that when the Status and Status Reason fields for the change requests match the value specified in the Begin column, the approval process will be started. Whenever there is a change in the Status and Status Reason for a change request, the workflow searches the Approval Process Configuration form to see if there are any approval configuration records for the current process combination. If a configuration record is found, then the process name will be returned to the change request and the application command to the Approval Server to start the approval process is issued.

When the approval process starts, the Status and Status Reason fields are locked to prevent further changes to the change request record until there is a decision (approved or rejected) from the approvers.

Approval configuration records are defined for change requests by company, so you can configure several configuration records as needed.

An explanation of the approval states are provided, as follows:

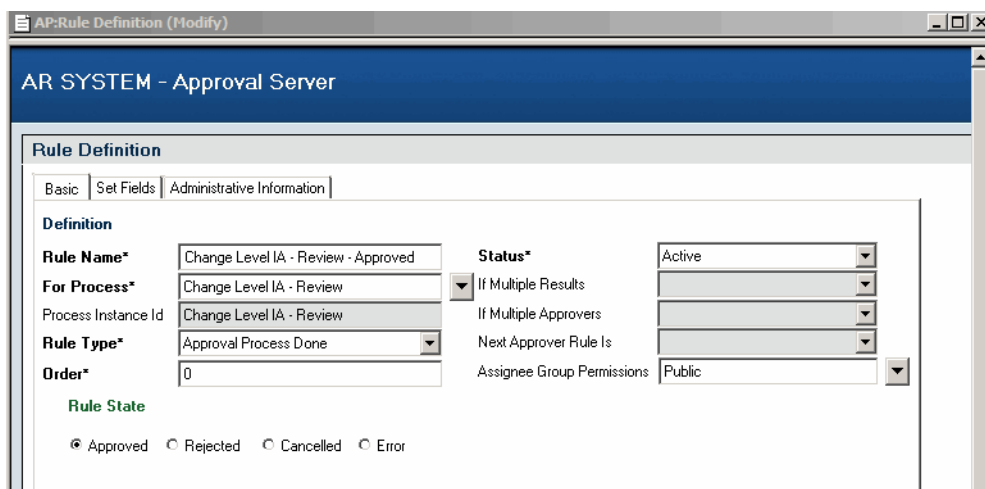
- **Begin state**—This state is an indicator to the Approval Server for starting the approval process. By default, the Review phase does not begin *until* the change request reaches the status of Request for Authorization.

- Approved state—If one or all approvers have approved the change request, then the Approval Server changes the Status and Status Reason fields values on the change request to match the values configured here. By default, if the change is approved in the Review phase, it then moves to the status of Request For Change. At that time, the locked Status and Status Reason fields on those records will be unlocked and the records will go through the rest of their life cycle.

NOTE

The Approved state is based on the rules set up in the Approval Server (in the AP:Rule Definition form, as shown in Figure 12-19). To access the AP:Rule Definition form from the AP:Administration Console, click the Rule tab, select a rule, and then click the View button. For more information on rules in the Approval Server, see the *BMC Remedy Action Request System BMC Remedy Approval Server Guide*.

Figure 12-19: AP:Rule Definition form



- Rejected state—This state defines the values of the Status and Status Reasons fields for change requests if a record is rejected.
- No Approvers state—If the Approval Server does not find any of the mapped approvers, then the Status and Status Reason field values on the two forms will be changed to the values specified.

Configuring approvals for CI changes

To configure the approval process for change requests associated with CIs, you should choose a phase and a process that works with CI properties. The following example configures the Review approval phase to use the Change Level CI - Review process.

In addition, you *must* also map approvals that specify CIs for the entire approval process to work as expected. When creating these approver mappings, you must specify either the CI Type or the CI Name. (For more information, see “Mapping approvers to approval phases for level-type approval processes” on page 338.)

After you have configured the CI approval process *and* the approval mapping, when a change request associated with a relevant CI reaches the Review phase, the approval server starts the approval process and creates an approval signature for the approver.

For more information, see the following sections:

- “Default global approval processes” on page 309
- “Change Management approver mappings” on page 330

► To configure approvals for change requests associated with CIs

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Approval Process Configuration, then click Open.
- 3 The Approval Process Configuration form appears. Search for an existing record that you can use to modify.

In this example, you will use the Review phase record to modify the Process Name to Change Level CI - Review.

- 4 Select the Form Name and Company for this approval process (for example, CHG:Infrastructure Change and Calbro Services).
- 5 Select the appropriate status, for example, Enabled.
- 6 Select a phase name, for example, Review.
- 7 Click Save.

If this is the first company configuration record you created, you are prompted that the system created additional process configuration records for *all* your approval phases (if you created additional approval definition phases). These new configuration records are based on the global settings. You can modify these new records as needed.

- 8 Open the new Review phase record for your company.
- 9 Select the CI process that corresponds to the phase, for example, Change Level CI - Review.
- 10 Click the Status Flow tab.
- 11 Select all the begin and end states for the process.
- 12 (Optional) Add any additional qualifications tab to the process.
- 13 Modify the remaining configuration records for your company.

Make sure you use the correct CI process that corresponds to the proper phase.

As a result, when a change is created for Calbro Services, the new approval process phase will be used for changes with CIs. In addition, the default behavior you expected for changes with impacted areas no longer applies.

Bypassing the approval process for emergency changes

You can configure emergency change requests to bypass some approval phases. To bypass the approval process for emergency changes, you must create a new record on the Approval Process Configuration form.

► To bypass the approval process for emergency changes

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Approval Process Configuration, then click Open.
The Approval Process Configuration form appears.

Figure 12-20: Creating Emergency approval process

- 3 Select the Form Name and Company for this approval process (for example, Calbro Services).
- 4 Select Enabled for the status.
- 5 Set the System Approval Flag to Yes so that no approvers can be mapped to this process on the Approval Mapping form.

If no approvers are mapped when the emergency approval process is called, the No Approvers approval state then applies, and the change request is approved. This setting allows you to track the approval process, but the change request is not held up waiting for approvals in the emergency case.

- 6 Enter a phase name, for example, Emergency.
- 7 Select a process name.

- 8 Click the Status Flow tab.
- 9 Select the Begin, Approved, Rejected, and Approved states for the process.
For more information, see “Approval states on the Status Flow tab” on page 323.
- 10 Click the Additional Qualifications tab.

Figure 12-21: Additional Qualifications tab

- 11 Select Emergency in the Change Timing list.
- 12 Click Save.

When a change is created for Calbro Services, and Emergency is selected in the Timing field, the new approval process phase will be used, bypassing the normal change states.

Configuring additional No Impact processes (optional)

No Impact changes are not treated any differently than standard changes. As a result, default changes that are No Impact go through all the same approvals required for normal changes. The exception is the Business Approval - No Impact phase that by default has a No Impact specific process created.

If an administrator wants to bypass some of the approval phases, there is a relatively straight forward solution, based on what you have already learned about configuring additional processes for changes.

For information on how to configure these processes, follow the steps in “Setting up approval process configuration records for your company” on page 317 and “Bypassing the approval process for emergency changes” on page 326.

► **To configure additional No Impact processes**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Approval Process Configuration, then click Open.
- 3 On the Approval Process Configuration form, configure Review and Close Down Approval approval processes that are specifically used for No Impact changes.
You can give the same phase name as the other processes.

NOTE

You do not need to create an Implementation Approval process for No Impact changes, because the default Business Approval – No Impact process goes from the Begin status of Request for Change to a finished Approved status of Scheduled. As a result, the change bypasses the Implementation Approval phase that starts at the Scheduled for Approval status.

- 4 In the Phase Name field on the Approval Process tab, append - No Impact to them.

For example, you would enter Close Down Approval - No Impact, essentially like you did when configuring an emergency change process. Make sure you use a useful name to denote that these processes are for No Impact changes.

This process then overrides the generic approval process that comes from the Status Flow and Additional Qualifications tabs.
- 5 On the Status Flow tab, make sure the Begin status is the same as the other approval process that you want to override.
- 6 On the Advanced Qualification tab, select No Impact from the Change Timing field.

With this setting, when a No Impact change is created, workflow is triggered to find and use the more specific approval process for No Impact changes.
- 7 Save your results.

You are now finished with the approval process configuration section.

Creating people and mapping roles for approvals

When a change request is configured to require approval, you should review who the approvers are and, if appropriate, create additional approvers. The following rules apply:

- You can add Individuals or Support Groups as approvers.
- Group approval requests are sent only to group members with the Infrastructure Change Approver role.
- If an individual approver is needed, only people defined within the People form can be chosen as approvers.

► To create individual and group approvers

— NOTE —

For more information, see “Configuring people information” on page 105.

- 1 From the Application Administration Console, click the Custom Configuration tab.

— TIP —

You can also click the Create People button in the Standard Configuration tab.

- 2 From the Application Settings list, choose Foundation > People > People, then click Open.
- 3 In the People form, enter the person’s required information.
- 4 Define the person as a member of the Support Staff *to include him or her as a group approver*.
 - a In the Login/ Access Details tab, give the person the required Change Management permissions, for example, Infrastructure Change User.

— NOTE —

The *minimum* permissions in BMC Remedy Change Management to approve change requests is Infrastructure Change Viewer. Users with these permissions can view change requests in the change request, but they must use Approval Central to approve them.

- b In the Support Groups tab, give the person the Infrastructure Change Approver support role *to include him or her as a group approver*.
 - c Add any other permissions as necessary.
- 5 Save your changes.

Change Management approver mappings

This section describes how to configure approver mappings to work with BMC Remedy Change Management.

NOTE

No approver mappings are provided by default with BMC Remedy Change Management. If you do not create any approver mappings, users move the change request through the entire change management lifecycle without encountering any approvals. If users encounters an approval phase, they can simply refresh the change request to move automatically to the next stage in the lifecycle.

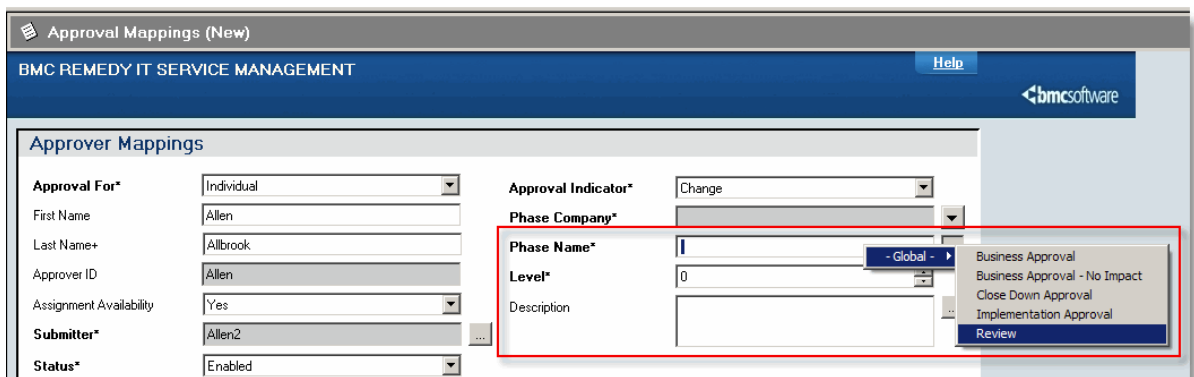
You use the Approver Mappings form to set up individuals and groups as approvers for each approval phase of change requests, based on the approval process defined in the Approval Process Configuration form (such as impacted area or configuration item). For more information, see the following procedures:

- “Creating individual mappings (for BMC Remedy Change Management)” on page 345
- “Creating group mappings (for BMC Remedy Change Management)” on page 348
- “Creating inherent group mappings” on page 353

By default, when you create your first set of mappings, you can choose any or all of the five approval phases, for example, Review, as shown in Figure 12-22. (For more information, see the list of phases in Table 12-4 on page 309.)

Level-type approval process configuration records only function *after* you have created approver mappings. By default, you can only create *impacted area* approver mappings to work with the default approval phases that are configured to work with BMC Remedy Change Management by default. Depending on the process focus (IA, CI, or basic), the mappings also work with criteria from the Categorization, Role, and Advanced Criteria tabs in the Approver Mappings form.

Figure 12-22: Approver Mappings form



As a result, to create *configuration item* approver mappings, you must create approval process configuration records that use the change approval processes for CIs. The approval processes are already provided for you with BMC Remedy Change Management (see Table 12-5 on page 310), but you must create the approval process configuration records; they are not provided by default. (For more information, see “Setting up approval process configuration records for your company” on page 317.)

NOTE

The rules of the Management Chain (parent-child type) and Ad Hoc processes in the Approval Server do not look for approval mapping records. Even if the approval mapping records exist, they have no effect on these rules. *Only* Level rules use the information in the Approver Mappings form. For level-type approval processes, approvers must be mapped.

Field values in Impacted Area approvals

When approver mappings are created, not all the fields on the Approver Mappings form apply to all approval processes. All CI values are ignored, for example, any values you select in the CI Type field, as shown in Figure 12-23.

Figure 12-23: Approver Mappings form—Impacted Area/CI tab

Approval Mappings APL000000000003 (Modify)

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Approver Mappings

Approval For* Individual

Approval Indicator* Change

First Name Allen

Phase Company* - Global -

Last Name+ Allbrook

Phase Name* Review

Approver ID Allen

Level* 0

Assignment Availability Yes

Description

Submitter* Allen2

Status* Enabled

Additional Mappings

Impacted Area / CI | Categorization | Role | Advanced Criteria

Impacted Area

Company (IA) .

Region (IA) .

Site Group (IA) .

Site (IA) .

Organization (IA) .

Department (IA) .

Clear

Configuration Item

Select On CI Type

CI Type

Clear

By default, *only* these four fields used with basic and Impacted Area approval processes.

These dots in the fields are wildcard placeholders, which return *all* records in a query.

These fields are not used.

IMPORTANT

Some fields in the Approver Mappings form have dots in them, as shown in Figure 12-23. These are wildcards, designed to return all records in a join-form query. You can replace them with specific search terms, for example, to create an IA approval for a specific company or site.

But although six fields in the Impacted Area part of the Impacted Area/CI tab have wildcards, *only* four fields apply by default to the Impacted Area created for a change request:

- Company
- Region
- Site Group
- Site

NOTE

An Impacted Area record does not need to include all four fields. The only required field is Company. These fields are also included with the basic approval processes. To use these fields, see “Using Impacted Areas with change requests” on page 332.

Using Impacted Areas with change requests



Impacted Areas are the default processes used with change requests. For example, the Change Level IA - Review process is used with the Review approval phase.

If you have configured approver mappings using the global phases and then you create a change request, the Company, Region, Site Group, and Site fields are automatically used. When you work the change request to reach the appropriate approval phase (for example, the Review phase), the Impacted Area approval is generated. (See Figure 12-24 on page 333.)

When you choose Advanced > Impacted Areas in the left navigation pane of the Change form *after* you create the change request, you can see that the Impacted Areas record that is created by default (in the Impacted Area dialog box) includes the values for Company, Region, Site Group, and Site.

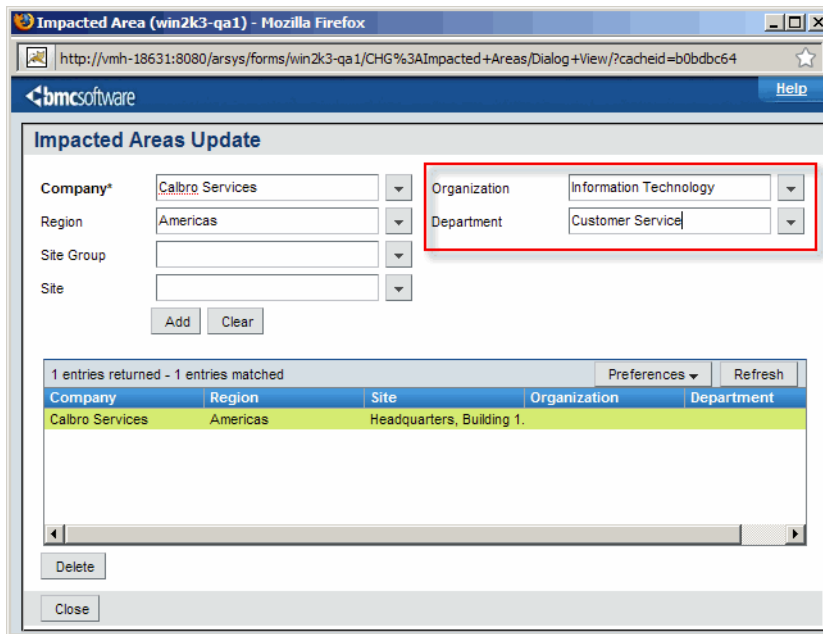
Figure 12-24: Impacted areas used in change request (by default)

The screenshot displays the BMC Software Change Management interface. On the left, a sidebar menu highlights 'Impacted Areas' under 'Time Segments'. The main window shows the 'Impacted Areas Update' dialog box, which is currently empty, indicating '0 entries returned - 0 entries matched'. The dialog includes fields for Company (Calbro Services), Region (Americas), Site Group, and Site, along with Organization (Information Technology) and Department (Customer Service) dropdowns. Below the dialog, the 'Change Location' section of the change request form is visible, containing fields for Company+, Region, Site Group, Site+, and Address, all of which are populated with the same values as the dialog box. The 'Requested For' section also shows fields for First Name+ and Last Name+.

You do not have to use the Impacted Area feature to generate these values with the change request. They are generated automatically with the change request, by default.

You can generate approvals that use the Organization and Department fields as well, as shown in Figure 12-25.

Figure 12-25: Creating impacted areas with Organization and Department



When you use the Impacted Area feature while creating the change request and select an Organization or a Department value, the system now generates *two* Impacted Area records (as shown in Figure 12-26).

- The default record includes the standard values for Company, Region, Site Group, and Site.
- The second record includes the values for Company, Region, Site Group, and Site, *but also* Organization, and Department.

Figure 12-26: Impacted areas used in change request—including Company and Department

The screenshot shows the BMC Remedy IT Service Management Change Management interface. The main form is titled "Change ID*" with the value "CRQ000000000005". The "Process Flow Status" section shows buttons for "Initiate", "Review & Authorize", "Plan & Schedule", "Implement", and "Closed". The "Change Request Information" section includes fields for "Change Type*", "Summary*", "Status*", "Draft", "Impact*", "Urgency*", "Risk Level*", and "Priority". The "Requester" section includes fields for "Requested By", "Support Company*", "First Name*", "Middle Name", "Last Name*", "Phone Number+", "Organization", "Department", "Support Organization", and "Support Group Name". The "Change Location" section includes fields for "Company*", "Region", "Site Group", "Site+", and "Address". Red boxes highlight the "Organization" and "Department" fields in the Requester section and the "Company*", "Region", "Site Group", and "Site+" fields in the Change Location section.

Including Impacted Area in approver mappings

If you modify the approver mapping to include Organization and Department, an IA approval now can be generated on the basis of *any* of the six fields in the Impacted Area. Figure 12-27 shows an approval mapping that uses only three fields.

Figure 12-27: Approver mapping now includes Organization and Department

The screenshot shows the "Additional Mappings" dialog box. The "Impacted Area" section is highlighted with a red box, showing the following fields:

Impacted Area / CI	Categorization	Role	Advanced Criteria
Company (IA)	Calbro Services		
Region (IA)			
Site Group (IA)			
Site (IA)			
Organization (IA)	Information Technology		
Department (IA)	Customer Service		

The "Organization (IA)" and "Department (IA)" fields are also highlighted with a red box.

When a change request is created with the Organization and Department values for the Impacted Areas, these records can then be matched against IA approval mapping records.

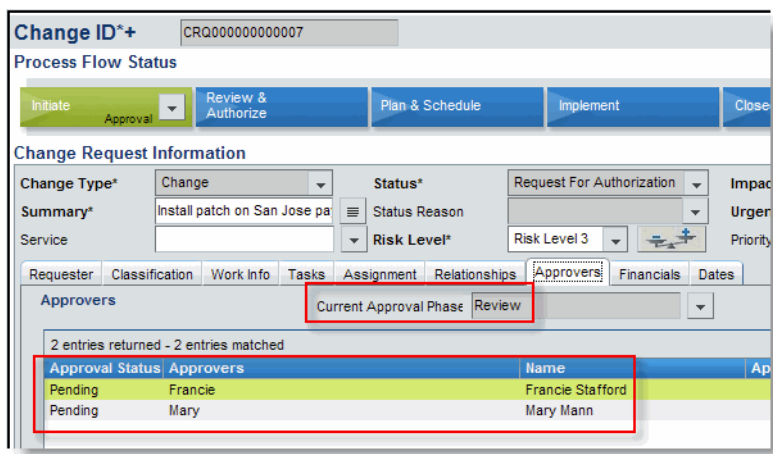
Using Impacted Areas (combined with approver mappings) gives you the ability to create multiple approvals, as needed. For example, using *only* the global processes and creating just two mappings, you can generate the following approvals.

Table 12-8: Approver Mappings

Individual approver mapping	Approval process phase	Values set in Impacted Area of Approver Mapping	IA fields used in change request
Mary Mann	Review	All fields filled with default dots	Company is required. The following fields are optional: <ul style="list-style-type: none"> ■ Region ■ Site Group ■ Site ■ Organization ■ Department
Francie Stafford	Review	<ul style="list-style-type: none"> ■ Company (IA)—Calbro Services ■ Organization (IA)—Information Technology ■ Department (IA)—Customer Service (As shown in Figure 12-27 on page 335.) 	Company is required. The following fields are optional: <ul style="list-style-type: none"> ■ Region ■ Site Group ■ Site

If a change request is created and the only impacted area is Company, only one approval is generated in the Review phase for Mary Mann to approve. But if the change request includes the impacted areas of Organization or Department, two approvals are generated: one for Mary and one for Francie (Figure 12-28).

Figure 12-28: Approvals generated based on Impacted Areas



Adding mapping fields to approvals for CIs

Conversely, only the fields in the Configuration Item area of the Impacted Area/CI tab apply to the CI approval processes.

Figure 12-29: Approver Mappings form—Configuration Item

The screenshot shows the 'Approver Mappings' form for Configuration Item. The 'Impacted Area / CI' tab is selected, and the 'Configuration Item' sub-section is highlighted with a red box. The 'Impacted Area' sub-section is crossed out with a red 'X'. Annotations indicate that the 'Impacted Area' fields are not used, while the 'Configuration Item' fields are used for CI approval processes.

If you configure CI approval processes, all Impacted Area values are ignored. Entering values into the other tabs on the form do not affect the CI approval processes.

NOTE

The one exception is that the Notify if Risk and Approve if Risk fields (on the Advanced Criteria tab) apply to *all* level processes, including CI approval processes.

Mapping approvers to approval phases for level-type approval processes

This section describes how to map approvers to approval phases for level approval processes.

► To map approvers to approval phases

- 1 From the Application Administration Console, choose Change Management >Approval > Approval Mappings, and then click Open.

The Approver Mappings form appears in New mode. The bottom half of the form is empty until you select an item in the Approval Indicator field.

NOTE

Always select the Approval Indicator field first.

- 2 Enter information in the following fields:

Field Name	Action and description
Approval For	<p>Select the type of approver.</p> <p>The options are:</p> <ul style="list-style-type: none"> ■ Individual—If you select this option, enter the individual’s last name and press the Enter key. The Approver ID (or login name) is automatically populated. For more information, see “Creating individual mappings (for BMC Remedy Change Management)” on page 345. ■ Group—If you select this option, the First Name, Last Name, and Approver ID fields are replaced by Support Company, Support Organization, and Support Group Name. <p>Select values for each field. The choices available in the Support Organization menu list are dependent upon the option you select for Support Company, and the choices available in the Support Group menu list are dependent upon the option you select for Support Organization. For more information, see “Creating group mappings (for BMC Remedy Change Management)” on page 348.</p> <ul style="list-style-type: none"> ■ Inherent Group/Role—If you select this option, the Inherent Group and Functional Role fields appear. For more information, see “Creating inherent group mappings” on page 353. <p>Note: If you select the Group option, all the people who belong to the support group <i>and</i> have the Infrastructure Change Approver functional role are set up as approvers. By default, only one approver in the group must sign off on the approval before it can move to the next stage, as described in “Creating group mappings (for BMC Remedy Change Management)” on page 348. For information on modifying the If Multiple Approvers setting in the AP:Administration form, see the <i>BMC Remedy Action Request System BMC Remedy Approval Server Guide</i> in the section on roles.</p>
First Name	If you select Approval For Individual, this field appears. Enter the first name of approver.

Field Name	Action and description
Last Name	If you select Approval For Individual, this field appears. Use auto-fill to enter the approver's last name.
Approver ID	If you select Approval For Individual, this read-only field appears. The Login ID of the approver automatically is included when you select the approver.
Assignment Availability	Select Yes to specify if the individual or group is available for the approval. Selecting No prevents all generation of approvals for the group or individual. Existing approvals are not affected.
Submitter	This field is auto-populated with the login name of the person who is creating this approver mapping.
Status	Indicates the current status of the group or individual approving the the change request. You can select the following options: <ul style="list-style-type: none"> ■ Proposed ■ Enabled ■ Offline ■ Obsolete ■ Archive ■ Delete For the approver mapping to be available, select a status of Enabled.
Approval Indicator	Select which form this approver mapping will affect. For BMC Remedy ITSM, you create approver mappings for Change. The other options are: <ul style="list-style-type: none"> ■ Purchase Requisition ■ Service Request ■ Service Request Definition After you select Change, the form reappears, containing only those mapping fields that are appropriate for the BMC Remedy Change Management application.
Phase Company	Phase company for this approver mapping. This option maps the approval phase to the approver.
Phase Name	Select which approval phase needs mapping in the application. A list of all available approval phases appears. By default, the only phases that appear are global. But if you create additional companies, their approval phases are displayed as well. Approval phases are used to define when the approval is required during the life cycle of the approval indicator record. Note: When you select a phase name, the Phase Company field is automatically populated. For more information on the approval phases included with BMC Remedy Change Management, see "Default global approval processes" on page 309.

Field Name	Action and description
Level	Specify the level of approval for the individual or group. The level number defines the routing sequence within the approval hierarchy. You enter a number to determine the order in which the approvers are defined. Approvers who are assigned lower numbers approve changes before those who have higher numbers.
Description	Enter a description for this approver mapping.
Support Company	If you select Approval For Group (from the Approval For field), this field appears. Enter the support company.
Support Organization	If you select Approval For Group (from the Approval For field), this field appears. Enter the support organization.
Support Group Name	If you select Approval For Group (from the Approval For field), this field appears. Enter the support group name.
Inherent Group	If you select Approval For Inherent Group/Role (from the Approval For field), this field appears. Enter the inherent group name (for example, Change Assigned Group).
Functional Role	If you select Approval For Inherent Group/Role (from the Approval For field), this field appears. Enter the functional role (for example, Infrastructure Change Approver).

3 Use the following additional mappings as needed:

- The Impacted Area/CI tab is used to map approvers to the change’s impacted areas or CIs.

Figure 12-30: Approver Mappings form—Impacted Area/CI tab

The screenshot shows the 'Additional Mappings' form with the 'Impacted Area / CI' tab selected. The 'Impacted Area' section contains six dropdown menus: Company (IA), Region (IA), Site Group (IA), Site (IA), Organization (IA), and Department (IA). A red rectangular box highlights the first four dropdowns (Company, Region, Site Group, and Site). An arrow points from the text 'For basic approval, used as Change Location fields' to this red box. To the right, the 'Configuration Item' section has a 'Select On' dropdown set to 'CI Type' and another 'CI Type' dropdown. A 'Clear' button is located at the bottom right of the form.

The Company, Region, Site Group, and Site fields in the Impacted Area/CI tab apply also to basic approval processes. These fields correspond to the Change Location fields in the Requester tab in a change request.

IMPORTANT

You can also map approvers to the CIs associated with the change if you customize an approval process configuration record that uses the CI processes. For more information, see “Configuring approvals for CI changes” on page 324.

If you map approvers to CIs, you must specify how the CI is selected.

Table 12-9: How CIs are selected

Select On	Action
CI Type	If you select on CI Type, you must select a specific CI type from the menu, for example, CI Type > System > Computer System.
CI Name	If you select on CI Name, you must enter a specific CI Name. To retrieve a list of CIs, place your cursor in the CI Name field and then press ENTER. The CI Relationship Search window appears. Perform a search for a CI and then click Select. The CI Name+ and CI ID fields are then populated.

- The Categorization tab is used to map approvers to services specified in the change and product categorizations of the change. The fields in the Categorization tab apply to the Impacted Areas and basic approval processes.

Figure 12-31: Approver Mappings form—Categorization tab

- The Role tab is used to map approvers based on the support groups defined within the change. The fields in the Role tab apply to the Impacted Areas and basic approval processes.

Figure 12-32: Approver Mappings form—Role tab

- The Advanced Criteria tab is used to map approvers based on specific criteria. The fields in the Advanced Criteria tab apply to the Impacted Areas and basic approval processes.

Figure 12-33: Approver Mappings form—Advanced Criteria tab

The Approve if Risk and Notify if Risk fields work in conjunction with each other. You can use the Notify if Risk < field to set up notification-only approvals based on risk level. These are courtesy notifications that do not require the recipient to perform any action. You can also use the Approve if Risk <= field to set up approvals based on risk level. If no values are specified, the approval is generated for any risk level.

NOTE

Risk Level 1 is the *lowest* and Risk Level 5 is the *highest* risk.

For example, if you select Approve if Risk <= Risk Level 2, the Notify if Risk < field is automatically set to Risk Level 3. The support staff person is required to approve all normal changes that have a Risk Level of 3 or greater. In addition, he or she is notified of similar changes with a Risk Level of 1 or 2. Table 12-10 explains these interactions in more detail.

Table 12-10: Interactions between change risk levels and approver mappings

Change risk level	Approval signatures generated	Non-approval notifications generated
Approval mapping where Approve if Risk <= is empty and Notify if Risk < Risk Level 1		
1	Yes	No
2	Yes	No
3	Yes	No
4	Yes	No
5	Yes	No
Approval mapping where Approve if Risk <= Risk Level 1 and Notify if Risk < Risk Level 2		
1	No	Yes
2	Yes	No
3	Yes	No
4	Yes	No
5	Yes	No
Approval mapping where Approve if Risk <= Risk Level 2 and Notify if Risk < Risk Level 3		
1	No	Yes
2	No	Yes
3	Yes	No
4	Yes	No
5	Yes	No
Approval mapping where Approve if Risk <= Risk Level 3 and Notify if Risk < Risk Level 4		
1	No	Yes
2	No	Yes
3	No	Yes
4	Yes	No
5	Yes	No
Approval mapping where Approve if Risk <= Risk Level 4 and Notify if Risk < Risk Level 5		
1	No	Yes
2	No	Yes
3	No	Yes
4	No	Yes
5	Yes	No

Table 12-10: Interactions between change risk levels and approver mappings (Continued)

Change risk level	Approval signatures generated	Non-approval notifications generated
Approval mapping where Approve if Risk <= Risk Level 5 and Notify if Risk < is empty		
1	No	Yes
2	No	Yes
3	No	Yes
4	No	Yes
5	No	Yes

4 Click Save.

In conclusion, approver mapping records are joined with Change IA join records, Change CI join records, or change requests to provide data for approval processing rules. The Approval Server uses various join forms to select approvers for specified processes.

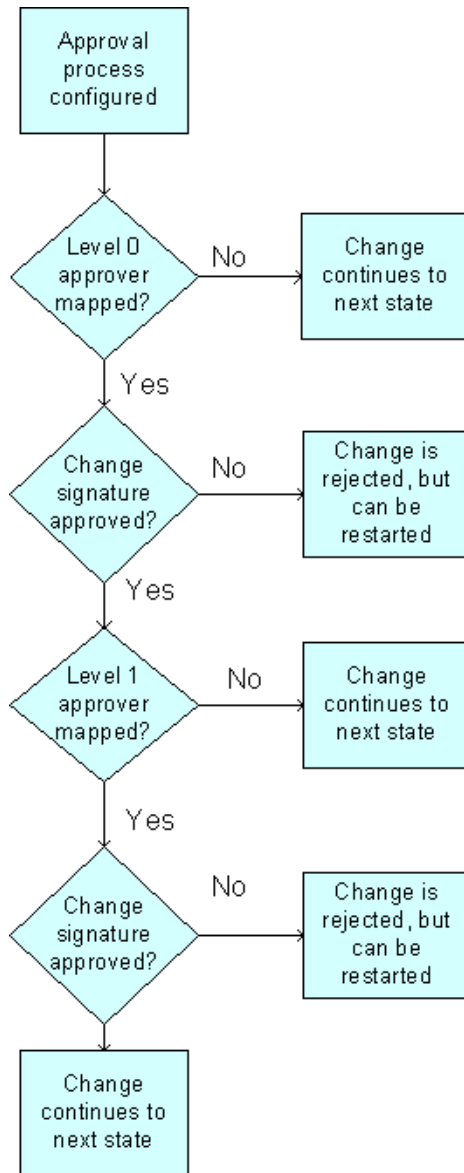
NOTE

Approval mapping records are specifically for the Change Level processes. The Change Ad Hoc process does not use the Approver Lookup record, nor does the Change Request Management Chain process.

Creating individual mappings (for BMC Remedy Change Management)

This section provides a step-by-step example of how to configure individual approver mappings to work with BMC Remedy Change Management.

Figure 12-34: Approval process with multiple levels



This example walks you through two distinct procedures:

- Creating individual mappings (this procedure)
- Creating group mappings (for BMC Remedy Change Management) (page 348)

The example uses multiple logins from the Calbro Services sample data to test the interactions between BMC Remedy Change Management and the Approval Server—Ian Plyment, Mary Mann, and Francie Stafford.

NOTE

To complete the group mapping example, you should also assign two of these users Infrastructure Change Approver functional roles and make sure they are in the same support group (for example, IT Hardware).

Table 12-11: Mapping users to support groups and functional roles

User	Application Permissions	Support Group	Support Group Functional Role
Ian Plyment	Infrastructure Change User	Frontoffice Support	■ Infrastructure Change Assignee
Mary Mann	Infrastructure Change Master	Backoffice Support	■ Infrastructure Change Manager ■ Infrastructure Change Approver
Francie Stafford	Infrastructure Change Viewer	Service Desk	■ Support Group Lead

This example also illustrates the use of multiple levels of approvals.

► **To create individual mappings**

- 1 From the Application Administration Console, choose Change Management >Approval > Approval Mappings, and then click Open.
- 2 In the Approval For field, select Individual.

NOTE

To map an individual approver, you can select *any* individual who has a record in the People form. It is *not* necessary to select a person with the Infrastructure Change Approver functional role (for example, Francie Stafford).

- 3 In the Approval Indicator field, select which form this approver mapping will affect, for example, Change.
- 4 In the Phase Name field, select which approval phase needs mapping in the application, for example, Review.

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- 5 Do not create any other mappings for now.
For example, let the Level field setting remain as zero for the time being.

- 6 Save the approver mapping, as shown in Figure 12-35.

Figure 12-35: Approver Mappings—Individual

If you have not created any other approver mappings and you did not modify the default approval configuration settings, whenever a change request is moved to the Review phase, the change request cannot be moved from the Request For Authorization status *until* this individual approves the request.

To test the relationship between change requests and the Approval Server, continue with the following steps:

- 7 To test the example, open three instances of the web client or BMC Remedy User, and then log in to your development server with your sample users.
- 8 As Ian Plyment, create a change request.
- 9 Use the Process Flow Status bar to move the change request from the Draft status to the next stage.
- 10 Click the Approvers tab in the change request.

If you have correctly created your approver mappings, the name of the individual (Mary Mann) that you mapped in steps 1 to 6 appears in the list of approvers.

NOTE

If Ian tries to approve his own request, he is prompted that he currently does not have access permission to approvals.

- 11 Log in to your server as Mary Mann, open the Approval Console, and then approve the change request.

- 12 Go back to the window where Ian Plyment is logged in, and then refresh the change request.
The Approvers table is now empty and the change request has moved to Planning In Progress status.
- 13 Create another approver mapping for Francie Stafford for the Review phase.
Make sure the Level setting for her is one (1). You now have created a multiple-level approver mapping—both Mary Mann and Francie Stafford must approve the change request before it can move to the next stage.
- 14 As Ian Plyment, create another change request, and then move it from Draft status to Request For Authorization status.
As before, if Ian clicks the Approver tab, he sees that Mary Mann is listed in the list of approvers. She is the first level of approvers who must approve the request before it moves to the next level.
- 15 As Mary Mann, refresh the contents of the Approval Console, and then approve the change request.
- 16 As Ian Plyment, refresh the change request.
The Approvers table now displays Francie Stafford in the list of approvers. She is the second level of approvers who must approve the request before it can be moved to the next stage.
- 17 Log in to your server as Francie Stafford, open the Approval Console, and then approve the change request.
- 18 As Ian Plyment, refresh the change request.
The Approvers table is now empty after both levels have approved the change request. The change request has moved to Planning In Progress status.
- 19 To continue testing how approvals work and to prevent confusion with group mappings, set your individual mappings to Offline status.

Creating group mappings (for BMC Remedy Change Management)

This section continues the mappings example by showing how to configure group approver mappings to work with BMC Remedy Change Management. In this example, Mary Mann is a member of the Service Desk support group, and she has the Infrastructure Change Approver functional role. If a change request requires group approval, anyone in the Service Desk support group must approve the request before it can move to the next stage.

IMPORTANT

When an approver list includes functional roles (for example, the Infrastructure Change Approval functional role), specific settings in the AP:Role form in the Approval Server determine whether the role is expanded into individual signature-line records for each member of the role, or a single signature-line record is created for the entire role.

In the Approval Server integration with BMC Remedy Change Management, the Infrastructure Change Approval functional role maps to the CAB-Member role name in the AP:Role form. (To access the AP:Role form from the AP:Administration Console, click the Role tab, select a role, and then click the View button.) In the CAB-Member role, group approvals by default require that only *one* member of the support group must sign the approval to move the request to the next stage. For more information on how the All Must Sign and If Multiple Approver settings are used in the Approval Server, especially if you require all members of a group to approve the request, see the *BMC Remedy Action Request System BMC Remedy Approval Server Guide*.

Figure 12-36: AP:Administration Console—Role tab

The screenshot shows the 'Administration' console with the 'Role' tab selected. A 'Show For Process' dropdown is at the top. Below it is a table with columns: Process, Rule, Notification, Role, Form, Administrator, Alternate, Role Name, If Multiple Approvers, Member List, and Status. The table contains three rows of data.

Process	Rule	Notification	Role	Form	Administrator	Alternate	Role Name	If Multiple Approvers	Member List	Status
							Overdue Oversight	One Must Sign	Violet Anderson;Helmut Kroll	Active
							SGP000000000004 CAB-Assignee	One Must Sign	jcmanger;john_change;ouser;alice	Active
							SGP000000000004 CAB-Manager	One Must Sign	jcmanger;	Active
							SGP000000000004 CAB-Member	One Must Sign	john_change;alice_approver;	Active

At the bottom of the console are buttons for View, Search, Create, Delete, and Refresh.

► **To create group mappings**

- 1 From the Application Administration Console, choose Change Management > Approval > Approval Mappings, and then click Open.
- 2 In the Approval For field, select Group.
- 3 When you select a Support Company, Support Organization, and Support Group, select a support group that includes people with the Infrastructure Change Approver functional role.
For this example, the Service Desk support group includes Mary Mann.
- 4 In the Approval Indicator field, select which form this approver mapping will affect, for example, Change.

- In the Phase Name field, select which approval phase needs mapping in the application, for example, Review.

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- Do not create any other mappings for now.
For example, let the Level field setting remain as zero for the time being.
- Save the approver mapping, as shown in Figure 12-35.

Figure 12-37: Approver Mappings—Group

If you disabled the individual approver mappings and you did not modify the default approval configuration settings, whenever a change request is moved to the Review phase, the change request cannot be moved from the Request For Authorization status *until* this support group approves the request.

To test the relationship between change requests and the Approval Server, continue with the following steps.

- To simplify the example, open two instances of the BMC Remedy User client or web client, and then log in to your development server with your sample users.
- As Ian Plyment, create a change request.
- Use the Process Flow Status wizard to move the change request from the Draft status to the next stage.

If Ian Plyment tries to approve his own request, he is prompted that he currently does not have access permissions to approvals.

- Click the Approvers tab in the change request.

If you have correctly created your approver mappings, the names of the individuals (Mary Mann) from the Service Desk support group that you mapped in steps 1 to 6 appears in the list of approvers, as shown in Figure 12-38.

Figure 12-38: List of approvers in the IT Hardware support group

The screenshot shows the BMC Remedy IT Service Management interface for Change Management. The change request is in the 'Approval' phase. The 'Approvers' table is highlighted with a red box and contains the following data:

Approval Status	Approvers	Name	Approver Signature	Alternate Sign
Pending	Mary	Backoffice Support		

- 12 Log in to your server as Mary Mann, open the Approval Console, and then approve the change request.
- 13 Go back to the window where Ian Plyment is logged in, and then refresh the change request.

The Approvers table is now empty and the change request has moved to Planning In Progress status.

NOTE

If you wanted to create a multiple-level group approver mapping, you could create another group approver mapping for another support group and set the Level setting to one (1). In this case, both support groups must approve the change request before it can move to the next stage. After the first support group approves the change (level 0), the second level of approvers (level 1) must approve the request before it can be moved to the next stage.

- 14 To continue testing how approvals work and to prevent confusion with group mappings, set your group mappings to Offline status.

Troubleshooting problems with group mappings

The BMC Remedy Change Management integration with the Approval Server pushes data in one direction from specific ITSM foundation forms to the AP:Role and AP:Alternate forms. This means that BMC Remedy Change Management updates can overwrite other modifications in AP:Role or AP:Alternate.

For example, users in the People form can add alternates and modify their own entries. Updates to the functional role of Support Groups are reflected in the AP:Role records.

NOTE

The ITSM foundation forms are common to all ITSM applications. As a result, the integration updates are not only from BMC Remedy Change Management integration. BMC Remedy Asset Management and BMC SRM all load the approval server foundation (APSFND) integration and so can push data to AP:Alternate and AP:Role.

By default with BMC Remedy Change Management, the Infrastructure Change Approver role is created as SGP000000xxxx | CAB-Member in AP:Role records (xxxx is substituted by the Group Id created for the Company). This reference is used by the approval server if a Group is mapped through Approver Mappings, or if a Group is added as an ad hoc approver.

If you created a group mapping, you might not see the expected approvers in the change request. The approval is pending, but no individual approvers are listed. If you see this problem, open the Support Group through the Application Administration Console and review the members of the Infrastructure Change Approval role. Answer the following questions:

Question	Answer
What is the status of the group? Is it Enabled?	If the Support Group is not Enabled, then the related AP:Role record will be Inactive.
What is the availability of members with a functional role of Infrastructure Change Approval?	If all members of a Support Group with Infrastructure Change Approval functional role access become unavailable, then the AP:Role record has no members to resolve and generate approval records when the Approval Server attempts to use it. Members with Infrastructure Change Approval functional role must have Availability set to Yes.
What if I still see unresolved group approvals?	Try removing the Infrastructure Change Approver functional role from the users, and then adding it back.

NOTE

You should perform all updates in the ITSM foundation forms. Direct updates to the AP: records can be overwritten when the related foundation data is synchronized.

Creating inherent group mappings

The Inherent Group menu lets you select a group specified on the Change form to be the Approval group, for example, Change Manager Group. The Functional Role menu lets you select a functional role for the approval, for example, Infrastructure Change Manager. These roles create individual approval entries for all people who have that functional role. You can use the Inherent Group and Functional Role menus combined to limit the individual approval entries to the Inherent Group.

You can select an Inherent Group without a Functional Role; however, you cannot choose a Functional Role without an Inherent Group.

Table 12-12 shows the results of approvers generated depending on the Inherent Group and Functional Role combinations chosen.

Table 12-12: Approvers generated depending on the Inherent Group and Functional Role combinations chosen

Inherent group	Functional role	Approvers generated
Change Assigned Group	No functional role selected	Members of Change Assignee Support group on change request with Infrastructure Change Approver functional role
Change Assigned Group	Infrastructure Change Approver	Members of Change Assignee Support group on change request with Infrastructure Change Approver functional role
Change Assigned Group	Infrastructure Change Assignee	Members of Change Assignee Support group on change request with Infrastructure Change Assignee functional role
Change Assigned Group	Infrastructure Change Manager	Members of Change Assignee Support group on change request with Infrastructure Change Manager functional role
Change Manager Group	No functional role selected	Members of Change Manager Group on change request with Infrastructure Change Approver functional role
Change Manager Group	Infrastructure Change Approver	Members of Change Manager Group on change request with Infrastructure Change Approver functional role
Change Manager Group	Infrastructure Change Assignee	Members of Change Manager Group on change request with Infrastructure Change Assignee functional role
Change Manager Group	Infrastructure Change Manager	Members of Change Manager Group on change request with Infrastructure Change Manager functional role
Change Implementer Group	No functional role selected	Members of Change Implementer Group on change request with Infrastructure Change Approver functional role
Change Implementer Group	Infrastructure Change Approver	Members of Change Implementer Group on change request with Infrastructure Change Approver functional role
Change Implementer Group	Infrastructure Change Assignee	Members of Change Implementer Group on change request with Infrastructure Change Manager functional role
Change Implementer Group	Infrastructure Change Manager	Members of Change Implementer Group on change request with Infrastructure Change Assignee functional role
Change Requester Group	No functional role selected	Members of Change Requester Support Group on change request with Infrastructure Change Approver functional role
Change Requester Group	Infrastructure Change Approver	Members of Change Requester Support Group on change request with Infrastructure Change Approver functional role

Table 12-12: Approvers generated depending on the Inherent Group and Functional Role combinations chosen

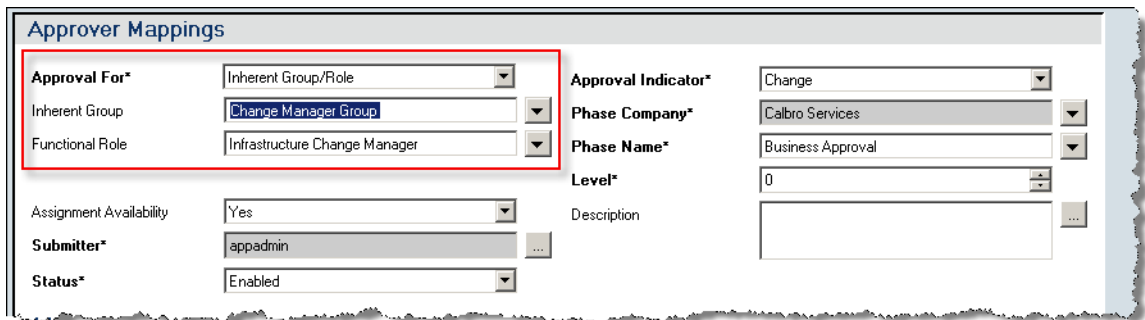
Inherent group	Functional role	Approvers generated
Change Requester Group	Infrastructure Change Assignee	Members of Change Requester Support Group on change request with Infrastructure Change Assignee functional role
Change Requester Group	Infrastructure Change Manager	Members of Change Requester Support Group on change request with Infrastructure Change Manager functional role

► **To create support group mappings**

- 1 From the Application Administration Console, choose Change Management >Approval > Approval Mappings, and then click Open.
- 2 In the Approval For field, select Inherent Group/Role.

The Approval Mappings form redisplay, so that the fields to configure a group mapping appear.

Figure 12-39: Inherent Group/Role fields displayed in Approval Mappings form



- 3 In the Inherent Group field, select a change management group (for example, Change Manager Group).
- 4 In the Functional Role field, select one of the ITSM functional roles defined for change management (for example, Infrastructure Change Manager).

Make sure that you select an inherent group that includes people with the functional role.

For this example, the Change Manager Group includes Mary Mann. Only this individual at Calbro Services has the functional role of Infrastructure Change Manager.

- 5 In the Approval Indicator field, select which form this approver mapping will affect, for example, Change.
- 6 In the Phase Name field, select which approval phase needs mapping in the application, for example, Review.

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- 7 Do not create any other mappings for now.

For example, let the Level field setting remain as zero for the time being.

- 8 Save the approver mapping.

If you disabled the individual approver mappings and you did not modify the default approval configuration settings, whenever a change request is moved to the Review phase, the change request cannot be moved from the Request For Authorization status *until* this inherent group/role approves the request.

To test the relationship between change requests and the Approval Server, continue with the following steps:

- 9 To simplify the example, open two instances of the BMC Remedy User client or web client, and then log in to your development server with your sample users.
- 10 As Ian Plyment, create a change request.
- 11 Use the Process Flow Status wizard to move the change request from the Draft status to the next stage.

If Ian tries to approve his own request, he is prompted that he currently does not have access permissions to approvals.

- 12 Click the Approvers tab in the change request.

If you have correctly created your approver mappings, the name of the individual (Mary Mann) from the Change Manager inherent group that you mapped in steps 1 to 6 appears in the list of approvers, as shown in Figure 12-38.

Figure 12-40: List of approvers in the Change Manager inherent group

The screenshot displays the BMC Remedy IT Service Management Change Management interface. The main window shows a change request with ID CRQ0000000000015. The process flow status is 'Approval', and the current phase is 'Review'. The change request information includes: Change Type: Change; Status: Request For Authorization; Impact: 4-Minor/Localized; Summary: Upgrade software on PC; Risk Level: Risk Level 3; Priority: Low. The 'Approvers' tab is selected, showing a list of approvers. The list contains one entry: 'Mary' with an approval status of 'Pending' and the name 'Backoffice Support'. The interface also includes a sidebar with navigation options and a bottom section with buttons for 'View Notifications', 'Add', 'Approve', 'Reject', 'Save', 'Print', and 'Close'.

Approval Status	Approvers	Name	Approver Signature	Alternate Sign
Pending	Mary	Backoffice Support		

- 13 Log in to your server as Mary Mann, open the Approval Console, and then approve the change request.

Only one member of the inherent group must approve the request to move it forward.

- 14 Go back to the window where Ian Plyment is logged in, and then refresh the change request.

The Approvers table is now empty and the change request has moved to Request For Change status.

NOTE

If you wanted to create a multiple-level inherent group approver mapping, you could create another inherent group approver mapping for another inherent group and set the Level setting to one (1). In this case, both inherent groups must approve the change request before it can move to the next stage. After the first inherent group approves the change (level 0), the second level of approvers (level 1) must approve the request before it can be moved to the next stage.

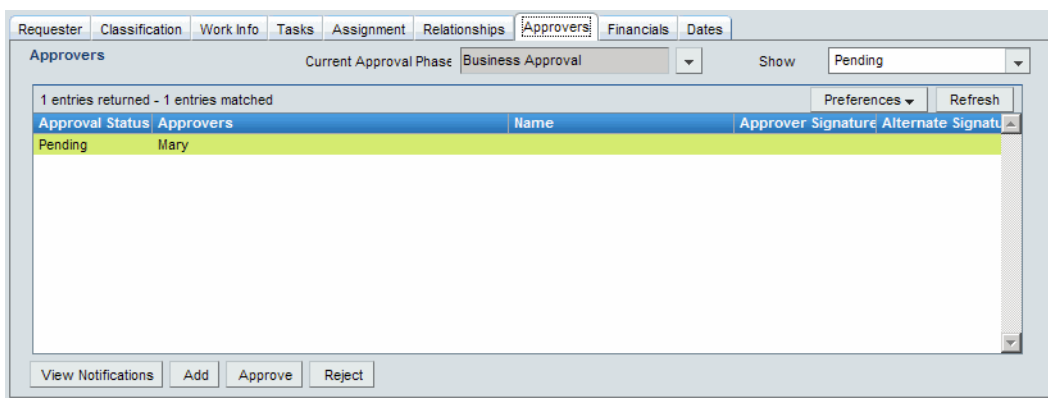
How approvals work with change requests

The Change Manager or Change Assignee controls the overall progression of a change request, and have the opportunity to perform approvals at several points in the change life cycle. For change requests in the Request for Change status with no approvers, the Change Manager and the Change Assignee have the opportunity to move the change forward to Planning In Progress, cancel it, or send it back to the requester by assigning it a status of Draft. For more information about approval states and phases, see “Change states and approval phases” on page 299.

After a change is planned and built, the change request is set to a status of Scheduled for Review. Once again, the Change Manager or Change Assignee have the opportunity to review change plans, schedules, and so on, before moving the change to the Implementation Approval phase.

Figure 12-41 shows the Approvers tab on the Change form.

Figure 12-41: Change request—Approvers tab



The following buttons control functions involving Approvers:

- View Notifications—Opens the APR:Non-ApprovalNotifications form so that you can view notifications in either Pending or Notified status.
- Add—Creates a new individual or group to approve the change.
- Approve—Allows a Change Manager or Change Assignee to approve the change on behalf of the selected approver, if they are defined as alternates.
- Reject—Allows a Change Manager or Change Assignee to reject the change on behalf of the selected approver, if they are defined as alternates.

The read-only Current Approval Phase field displays what approval phase the change is in during its life cycle. For more information, see “Setting up approval process configuration records for your company” on page 317 and “Change states and approval phases” on page 299.

Working requests through the approval phases

When an approval is required to move the request to the next status, the Process Status Flow area prompts you to approve or reject the approval, or cancel the request. You cannot move the request to the next status unless you first receive an approval.

When a request requires an approval, its approvers are notified. Notifications are sent according to the method specified in the approver’s record in the People form.

NOTE

The Approval Process Configuration form is used to configure the sequence when a request is approved or rejected, or how the system should respond if no approvers are available. For more information, see “Setting up approval process configuration records for your company” on page 317.

When you have finished planning the request, and have supplied all the information that the approvers require to review the request, you can submit the request to the approval process.

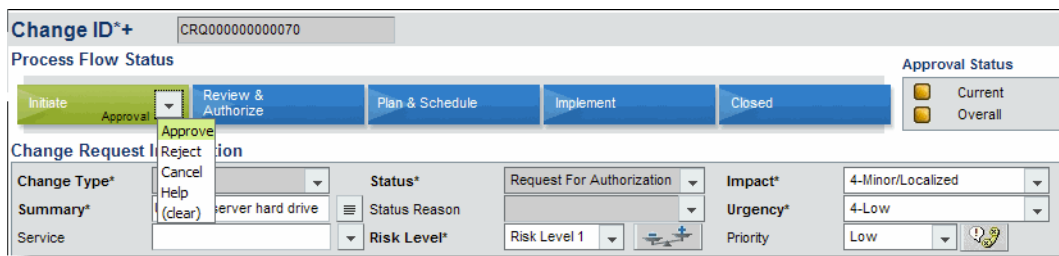
► **To submit the request to the approval phase**

- 1 Open the change request or release request.
- 2 Step through the states of your request.

TIP

When you reach a crucial state and perform an important action (for example, adding dates in the Scheduled status), refresh the request to make sure you are viewing the proper step in the workflow.

Figure 12-42: Approving the request



- 3 When you reach an approval phase, do one of the following tasks:
 - Click the accelerator in the Process Flow Status area and then approve, cancel, or reject the request.
 - Click the Approvers tab and then approve or reject the request.

NOTE

As a Change Manager or a Change Assignee (or a Release Manager or Release Assignee), you can perform these actions for standard approvals, if you are the approver, or if an alternate approver.

If the change is configured for the change level approval process, all approvers on the first level are notified that they must review the request.

If the change is configured for the change management chain (parent-child) approval process, the requester’s manager is notified.

If the change is configured for the ad hoc approval process, the Change Manager is notified.

The signature of the last approver completes the approval process, and automatically moves the change request to the next status.

- 4 Save your changes.

Handling approvals for emergency change requests

Depending on how the application administrator has configured the application, change requests that have been designated as emergencies *can* be allowed to bypass the approval process even if they normally require approval.

These are possible configurations:

- The application administrator *can* configure emergency change requests to bypass the normal change states and approval process. To configure a new approval process for emergency changes, the application administrator must create a new approval process for your company. As a result, when a Change Manager or Change Assignee creates a change and selects Emergency in the Timing field, the new approval process phase is then used. For more information, see “Bypassing the approval process for emergency changes” on page 326.

- The Change Manager or the Change Assignee can choose to add approvers to the process. The Approval Status field is set to Approval Required.
 - If the Change Manager assigns approvers, the approval process proceeds as usual.
 - If the Change Manager does not assign approvers, the Approval Status is set to Approved, and the change request can be implemented.

If the change request is designated as an emergency and your organization uses the Change Management Chain approval process, the Requested For manager is the first approver in the management chain. Change managers can add more approvers if appropriate. They cannot delete approvers.

Resubmitting a rejected request

If an approver rejects a proposed request, the approval process is stopped. The Status field is set to Rejected. You can resubmit the request for approval.

► To resubmit a rejected request

- 1 Open the change request or release request.
- 2 Do one of the following:
 - Click the accelerator in the Process Flow Status area and then select Restart. The change request returns to the approval process phase it was in when it was rejected, for example, Review.
 - In the Status field, manually set the change request back to a different status, for example, Request for Authorization.
- 3 Click the Work Info tab and explain in the Details field why you are resubmitting the request for approval.
- 4 Save your changes.

Release Management approver mappings

This section describes how to configure approver mappings to work with Release Management.

IMPORTANT

Read “Change Management approver mappings” on page 330 *carefully* before you start creating your own release approver mappings.

You use the Approver Mappings form to set up individuals and groups as approvers for each approval phase of release requests, based on the approval process defined in the Approval Process Configuration form (such as configuration item). For more information, see the following procedures:

- “Mapping approvers to approval phases for level-type approval processes—Release Management” on page 360
- “Creating individual mappings (for Release Management)” on page 365
- “Creating group mappings (for Release Management)” on page 366
- “Creating inherent group mappings (for Release Management)” on page 367

Mapping approvers to approval phases for level-type approval processes—Release Management

For Release Management, this section describes how to map approvers to approval phases for level approval processes.

Figure 12-43: Approver Mappings—Release Management

NOTE

The Approval Mappings form and its fields for Release Management are slightly different than for BMC Remedy Change Management. Follow these instructions carefully.

► To map approvers to approval phases

- 1 From the Application Administration Console, choose Release Management > Approval > Approval Mappings, and then click Open.

The Approver Mappings form appears in New mode. The bottom half of the form is empty until you select an item in the Approval Indicator field.

NOTE

Always select the Approval Indicator field first.

- 2 Enter information in the following fields:

Field Name	Action and description
Approval For	Select the type of approver. The options are: <ul style="list-style-type: none"> ■ Individual—If you select this option, enter the individual’s last name and press the Enter key. The Approver ID (or login name) is automatically populated. For more information, see “Creating individual mappings (for BMC Remedy Change Management)” on page 345. ■ Group—If you select this option, the First Name, Last Name, and Approver ID fields are replaced by Support Company, Support Organization, and Support Group Name. ■ Inherent Group/Role—If you select this option, the Inherent Group and Functional Role fields are displayed.
First Name	If you select Approval For Individual, this field appears. Enter the first name of approver.
Last Name	If you select Approval For Individual, this field appears. Use auto-fill to enter the approver’s last name.
Approver ID	If you select Approval For Individual, this read-only field appears. The Login ID of the approver automatically is included when you select the approver.
Support Company	If you select Approval For Group (from the Approval For field), this field appears. Enter the support company.
Support Organization	If you select Approval For Group (from the Approval For field), this field appears. Enter the support organization.
Support Group Name	If you select Approval For Group (from the Approval For field), this field appears. Enter the support group name.
Inherent Group	If you select Approval For Inherent Group/Role (from the Approval For field), this field appears. Enter the inherent group name.
Functional Role	If you select Approval For Inherent Group/Role (from the Approval For field), this field appears. Enter the functional role (for example, Release Approver).
Assignment Availability	Select Yes to specify if the individual or group is available for the approval. Selecting No prevents all generation of approvals for the group or individual. Existing approvals are not affected.

Field Name	Action and description
Submitter	This field is auto-populated with the login name of the person who is creating this approver mapping.
Status	<p>Indicates the current status of the group or individual approving the the change request. You can select the following options:</p> <ul style="list-style-type: none"> ■ Proposed ■ Enabled ■ Offline ■ Obsolete ■ Archive ■ Delete <p>For the approver mapping to be available, select a status of Enabled.</p>
Approval Indicator	<p>Select Release.</p> <p>The other options are:</p> <ul style="list-style-type: none"> ■ Change ■ Purchase Requisition ■ Service Request ■ Service Request Definition <p>After you select Release, the form reappears, containing only those mapping fields that are appropriate for the Release Management module.</p>
Phase Company	<p>Phase company for this approver mapping.</p> <p>This option maps the approval phase to the approver.</p>
Phase Name	<p>Select which approval phase needs mapping in the application (for example, Initiate or Planning).</p> <p>A list of all available approval phases appears. By default, the only phases that appear are global.</p> <p>But if you create additional companies, their approval phases are displayed as well. Approval phases are used to define when the approval is required during the life cycle of the approval indicator record.</p> <p>Note: When you select a phase name, the Phase Company field is automatically populated.</p>
Level	<p>Specify the level of approval for the individual or group. The level number defines the routing sequence within the approval hierarchy. You enter a number to determine the order in which the approvers are defined.</p> <p>Approvers who are assigned lower numbers approve changes before those who have higher numbers.</p>
Description	Enter a description for this approver mapping.

3 Use the following additional mappings as needed:

- The Impacted Area/CI tab is used to map approvers to the release's impacted areas or CIs.

Figure 12-44: Approver Mappings form—Impacted Area/CI tab

Here you can map approvers to the CIs associated with the release. When you map approvers to CIs, you must specify how the CI is selected.

Table 12-13: How CIs are selected

Select On	Action
CI Type	If you select on CI Type, you must select a specific CI type from the menu, for example, CI Type > System > Computer System.
CI Name	If you select on CI Name, you must enter a specific CI Name. To retrieve a list of CIs, place your cursor in the CI Name field and then press ENTER. The CI Relationship Search window appears. Perform a search for a CI and then click Select. The CI Name+ and CI ID fields are then populated.

The Company, Region, Site Group, and Site fields in the Impacted Area/CI tab apply also to basic approval processes. These fields correspond to the Release Location fields in the General tab in a release request.

- The Categorization tab is used to map approvers to services specified in the operational and product categorizations of the release. You can specify a company and a business justification (for example, Upgrade).

Figure 12-45: Approver Mappings form—Categorization tab

Impacted Area / CI | **Categorization** | Role | Advanced Criteria

Company (O/P) [] Business Justification []

Operational Categorization | **Product Categorization**

Tier 1 (O) [] Tier 1 (P) []

Tier 2 (O) [] Tier 2 (P) []

Tier 3 (O) [] Tier 3 (P) []

Product (P) []

Clear

- The Role tab is used to map approvers based on the support groups defined within the release. The fields in the Role tab apply to basic approval processes.

Figure 12-46: Approver Mappings form—Role tab

Impacted Area / CI | Categorization | **Role** | Advanced Criteria

Requester Group | **Release Manager**

Company (R) [] Company (M) []

Organization (R) [] Organization (M) []

Group (R) [] Group (M) []

Clear Clear

- The Advanced Criteria tab is used to map approvers based on specific criteria. The fields in the Advanced Criteria tab apply to basic approval processes.

Figure 12-47: Approver Mappings form—Advanced Criteria tab

The Approve if Risk and Notify if Risk fields work in conjunction with each other. You can use the Notify if Risk < field to set up notification-only approvals based on risk level. These are courtesy notifications that do not require the recipient to perform any action. You can also use the Approve if Risk <= field to set up approvals based on risk level. If no values are specified, the approval is generated for any risk level.

NOTE

Risk Level 1 is the *lowest* and Risk Level 5 is the *highest* risk.

- 4 Click Save.

NOTE

Approval mapping records are specifically for the Release Level processes.

Creating individual mappings (for Release Management)

This section describes how to configure individual approver mappings to work with Release Management. For more information, see “Creating individual mappings (for BMC Remedy Change Management)” on page 345.

► **To create individual mappings**

- 1 From the Application Administration Console, choose Release Management > Approval > Approval Mappings, and then click Open.
- 2 In the Approval For field, select Individual.

NOTE

To map an individual approver, you can select *any* individual who has a record in the People form. It is *not* necessary to select a person with the Release Approver functional role.

- 3 In the Approval Indicator field, select which form this approver mapping will affect, for example, Release.
- 4 In the Phase Name field, select which approval phase needs mapping in the application, for example, Initiate.

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- 5 Enter remaining mappings as needed.
For more information, see “Mapping approvers to approval phases for level-type approval processes—Release Management” on page 360.
- 6 Save the approver mapping.
If you have not created any other approver mappings and you did not modify the default approval configuration settings, whenever a release request is moved to the Initiate phase, the release request cannot be moved forward *until* this individual approves the request.

Creating group mappings (for Release Management)

This section describes how to configure individual group mappings to work with Release Management. For more information, see “Creating group mappings (for BMC Remedy Change Management)” on page 348.

► To create group mappings

- 1 From the Application Administration Console, choose Release Management > Approval > Approval Mappings, and then click Open.
- 2 In the Approval For field, select Group.
- 3 When you select a Support Company, Support Organization, and Support Group, select a support group that includes people with the Release Approver functional role.
- 4 In the Approval Indicator field, select which form this approver mapping will affect, for example, Release.
- 5 In the Phase Name field, select which approval phase needs mapping in the application, for example, Initiate.

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- 6 Enter remaining mappings as needed.
For more information, see “Mapping approvers to approval phases for level-type approval processes—Release Management” on page 360.

7 Save the approver mapping.

If you disabled the individual approver mappings and you did not modify the default approval configuration settings, whenever a release request is moved to the Initiate phase, the release request cannot be moved forward *until* this support group approves the request.

Creating inherent group mappings (for Release Management)

The Inherent Group menu lets you select a group specified on the Release form to be the Approval group, for example, Release Manager Group. The Functional Role menu lets you select a functional role for the approval, for example, Release Manager. These roles create individual approval entries for all people who have that functional role. You can use the Inherent Group and Functional Role menus combined to limit the individual approval entries to the Inherent Group.

► To create support group mappings

- 1 From the Application Administration Console, choose Release Management > Approval > Approval Mappings, and then click Open.
- 2 In the Approval For field, select Inherent Group/Role.

The Approval Mappings form redisplay, so that the fields to configure a group mapping appear.

Figure 12-48: Inherent Group/Role fields displayed in Approval Mappings form

The screenshot shows the 'Approver Mappings' form with the following fields and values:

Field	Value
Approval For*	Inherent Group/Role
Inherent Group	[Empty]
Functional Role	Release Manager
Approval Indicator*	Release
Phase Company*	- Global -
Phase Name*	Planning
Level*	0
Assignment Availability	Yes
Submitter*	Allen2
Status*	Enabled
Description	[Empty]

A red box highlights the 'Approval For*', 'Inherent Group', and 'Functional Role' fields.

- 3 In the Approval Indicator field, select which form this approver mapping will affect, for example, Release.
- 4 In the Inherent Group field, select a release management group.
- 5 In the Functional Role field, select one of the ITSM functional roles defined for release management (for example, Release Manager).

Make sure that you select an inherent group that includes people with the functional role.

- 6 In the Phase Name field, select which approval phase needs mapping in the application (for example, Planning).

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- 7 Enter remaining mappings as needed.

For more information, see “Mapping approvers to approval phases for level-type approval processes—Release Management” on page 360.

- 8 Save the approver mapping.

If you disabled the individual approver mappings and you did not modify the default approval configuration settings, whenever a release request is moved to the Planning phase, the release request cannot be moved forward *until* this inherent group/role approves the request.

Chapter **13** Configuring BMC Remedy Incident Management

This section covers configuration features that are specific to BMC Remedy Incident Management.

The following topics are provided:

- Decision tree configuration (page 370)
- Working with scripts (page 372)
- BMC Remedy Incident Management templates (page 376)
- Advanced options (page 382)

Decision tree configuration

A decision tree takes the user step-by-step through a questionnaire. Based on the user's answers, the decision tree completes part of the form for a new incident request record by copying blocks of text into the record. Each element in the decision tree displays a list of items. The user's final selection completes part of the incident.

A *decision tree* is comprised of *main branches* and *branches*. It might also include *branch items*. A main branch groups together branches and branch items. Branches can group together branch items. The main branches are the initial prompts or questions that the user sees. When a user selects a main branch, the appropriate branches are displayed. For example, a user might select "Is this a hardware issue?" Based on this reply, the decision tree displays a list of: workstation, monitor, or printer issues.

When the user selects from a branch, further branch items might be displayed. For example, if the user selects printer issues, the incident might be categorized, and the user can select further from: paper jam, low toner, or other printing issues.

Example of branching structure

The following is an example branching structure for a decision tree:

- *Is this a hardware issue?* (Main branch)
 - Is this a workstation issue? (Branch 100)
 - Is the workstation unable to boot? (Branch item 101)
 - No power? (Branch item 102)
 - Is this a monitor issue (Branch 200)
 - Does the display flicker excessively? (Branch item 201)
 - No power? (Branch item 202)
 - Picture appears incorrectly? (Branch item 203)

► To configure a decision tree

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Decision tree configurations > Decision Tree, then click Open.

The Decision Tree form appears. The form opens in New mode to create a new decision tree. To modify an existing decision tree, select the appropriate decision tree.

- 3 If the decision tree applies to all companies, leave the default value of Global in the Company field. Otherwise, select the appropriate company.
- 4 Enter a brief description in the Description field. If a system has more than one decision tree, users select the appropriate decision tree by this description.
- 5 If appropriate, select a locale.

- 6 If the decision tree is not ready to be used, select a status of either Proposed or Offline. When the decision tree is ready for use, change the status to Enabled.
- 7 Click Save.

NOTE

You can create branches of the decision tree only after you save it.

- 8 Create main branches of the decision tree by performing the following steps for each main branch.
 - a Click New Main Branch. The Branch Update dialog box appears.
 - b Type the question in the Branch Text field.
 - c If there are multiple main branches, type or select the appropriate sort order. This controls the order in which the questions appear.
 - d Click Save to save the main branch.
- 9 Create branch details by performing the following steps for each branch detail.

NOTE

Branch details specify the actions you take to complete the incident form. They are grouped under main branches. Branch details can include both branches and branch items. A branch is attached directly to a main branch. A branch item is attached to either a branch or another branch item. A branch and a branch item both include a text prompt and an action.

- a Select the appropriate main branch, branch, or branch item.
- b Click New Branch or New Branch Item. The Branch Update dialog box appears.
- c Enter the question or prompt in the Branch Text field.
- d Enter or select the appropriate sort order.

TIP

If you leave gaps in the sort order, it is easier to insert branches later. For example, if you give three branches sort orders of 100, 200, and 300, you can later insert another branch at 150 without renumbering.

- e Select the appropriate incident action type. You are prompted to specify details for the action, as described in the following table.

Incident action type	Details to specify	Effect when branch or branch detail is selected by user
None	No details.	No action is performed.
Template	Select the incident template.	The incident form is populated by the incident template. For information about templates, see "BMC Remedy Incident Management templates" on page 376.

Incident action type	Details to specify	Effect when branch or branch detail is selected by user
Categorization	Select the appropriate incident type, operational categorization, and product categorization.	The incident form is populated with the values that you specify here.
Summary / Notes	Specify a summary description and either: <ul style="list-style-type: none"> ■ Enter a detailed description. OR ■ Select Yes for prompt for input and enter questions to prompt the user in the Detailed Description field. 	The description is copied to the Summary field of the incident form. Depending on the selection: <ul style="list-style-type: none"> ■ The detailed description are copied to the Notes field. ■ The user is prompted with questions, and the answers are copied to the Notes field.
Script	Select the appropriate script.	The script prompts the user with questions to ask the customer. For information about scripts, see “Creating scripts” on page 373.
Solution	Select the appropriate solution entry and whether it resolves or relates to the incident.	Sets the relationship between the incident and the solution entry.
Known Error	Select the appropriate known error and whether it resolves or relates to the incident.	Sets the relationship between the incident and the known error.

- f Click Save to save the branch or branch item.
- 10 Continue to add main branches, branches, and branch items as required.
- 11 Click Save to save the decision tree.

Working with scripts

Initiator scripts provide instructions to service desk analysts that describe how to log an incident. The list of available initiator scripts is mapped to the agent’s support group or initiator, which logs the incident.

Assignment scripts are similar to initiator scripts; the difference is that assignment scripts are mapped to the assigned group of the incident. After the incident assignment group is selected, a list of assignment scripts becomes available to assist an agent with logging the incident. After scripts are created, they must also be mapped to an organization, location, and organizational or product categorization structure to be available in the Incident form.

The following topics are provided:

- Creating scripts (page 373)
- Mapping scripts (page 374)
- Using manage mappings (page 375)

Creating scripts

There are two types of scripts: initiator scripts and assignment scripts. *Initiator scripts* are created and used by the support group that creates incidents. They can be used to provide service desk analysts with questions to ask customers regarding an incident.

Assignment scripts are created by non-service desk support groups that are generally assigned incidents for resolution. These scripts provide service desk analysts with questions to ask customers regarding their incidents so they can collect information that is relevant to the support group assigned the incident.

► To create a script

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Script Configuration > Script Database, then click Open.
The Script Setup form appears.
- 3 Click Add.
The Script Update form appears.
- 4 In the Script Type field, select Assignment or Initiator.
- 5 Enter a description and select the status.
- 6 In Copy Field, select where the script is copied when it is selected.
- 7 Click Select Group.
- 8 In the Select My Group dialog box, select the support group for this script, then click OK.
- 9 In the Script field, enter the text of the script, such as a list of questions to ask a customer about an issue.
- 10 Click Save.

After you create a script, you must relate it to a mapping entry to make it available for selection in BMC Remedy ITSM forms, such as the Incident form in BMC Remedy Incident Management.

Mapping scripts

Mappings are used to search for scripts within an BMC Remedy ITSM form, such as the Incident form in BMC Remedy Incident Management. Script mappings consist of the following data structures:

- Organization
- Location
- Organizational Categorization
- Product Categorization

► To relate a script to a mapping entry

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Script Configuration > Script Database, then click Open.

The Script Setup form appears.

- 3 To search for the script, enter search criteria, then click Search.
- 4 In the Script table, select the script to associate with a mapping.

NOTE

The scripts in the Script table drive the mapping entries in the Script Association Mapping table (that is, the scripts in the Script table are directly related to the mappings in the Script Association Mapping table).

- 5 In the Script Association Mappings area, click Search.
The Manage Mappings form appears.
- 6 You can search for existing mappings or create a new mapping:
 - To search for existing mappings, enter the search criteria in the Script Mapping Search Criteria section, then click Search. Continue starting with step 2 on page 375.
 - To create a new mapping, click the New button.

The New Script Mapping form appears.

The New Script Mapping form contains the mapping fields that you can use for your script.

- 7 Enter the new script mapping information.
- 8 Click Save.

► To relate the script to this mapping entry

- 1 On the Script Setup form, use the Search Criteria section to search for and retrieve the correct script.

When the search finishes, it places all of the matches in the table.

- 2 In the table, select the script and then click Search in the Script Association Mappings section.
- 3 Use the Script Mapping Search Criteria area of the Script Mapping Selection dialog box to locate the mapping to which you want to relate the script.

NOTE

If a mapping does not exist, you can create one by clicking New. For information about creating new mappings, see “To relate a script to a mapping entry” on page 374.

- 4 Select the mapping you want from the table on the Script Mapping Selection dialog box and click Select.

Modifying a script

Use the following procedure to modify a script.

► To modify a script

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Script Configuration > Script Database, then click Open.
The Script Setup form appears.
- 3 To search for the script, enter search criteria, then click Search.
- 4 In the Script table, select the script to modify, then click Modify.
The Script Update form appears.
- 5 Modify the information, then click Save.

NOTE

To delete a script, select it, then click Delete.

Using manage mappings

You can use the manage mappings form as a central area to add, modify, and delete mapping records.

► To use manage mappings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Script Configuration > Script Database, then click Open.
The Script Setup form appears.

- 3 Click Manage Mappings.
The Manage Mappings form appears.
- 4 Use this form to add, modify, and delete mapping records.

NOTE

Deleting a mapping might make script entries invisible if scripts are associated with the deleted mapping.

BMC Remedy Incident Management templates



As administrator, you can simplify the process of recording incidents by creating templates for your users. You create templates to quickly record standard incidents. For example, you can create a template to record printer incidents.

You can create as many templates as you want. But the best practice is to create templates only for routine incidents that users frequently record.

When you create an incident template, the values you configure in the Incident Templates form are used to add information to the Incident form.

► To configure an incident template

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Template > Template, then click Open.

The Incident Template Selection dialog box appears.

- 3 To modify an existing template, perform the following steps.
 - a In the Viewing Templates for Support Group field, select the appropriate support group.

The list of templates displays the templates for that support group.

- b Select the template, then click View.

- 4 To create a new template, click Create.

The Incident Template form appears.

- 5 In the Template Name field, type a brief descriptive name for the template.

When users select a template, they make their selections based on a list of the template names. The template name you create should make it easy to select the appropriate template.

- 6 From the Template Status list, select Enabled.

Enabled indicates that the template is available for use in BMC Remedy Incident Management. If the template should not be available in BMC Remedy Incident Management, you can select the appropriate status: Proposed, Offline, Obsolete, Archived, or Delete.

NOTE

The following step applies only to installations that are running BMC Remedy Incident Management in the Best Practice view. For information about the Best Practice view, see the *BMC Remedy Service Desk: Incident Management 7.5.00 User's Guide*.

- 7 Select or create the appropriate template categorizations for Tier 1, Tier 2, and Tier 3.

NOTE

To create a template categorization, type the category name in the template category field. When you save the template, the category name is also saved and added to the field's selection list, where it is available to select when you create the next template.

For example, to organize templates related to network incidents, you create a Tier 1 category called Network, a Tier 2 category called Outage, and a Tier 3 category called Router. You then create a template called "Router Down" as described later in this procedure. This template appears in the Incident Template Selection dialog box under:

Network > Outage > Router

Next, under the Tier 1 level (Network), you create a second Tier 2 category called Connectivity. Because you do not need a third tier to organize connectivity issues, you leave the Tier 3 category blank and create a template called "PC Can't Connect to the Network." This template appears in the Incident Template Selection dialog box under:

Network > Connectivity

NOTE

The following step applies only to installations that are running BMC Remedy Incident Management in Classic view. For information about the Classic view, see the *BMC Remedy Service Desk: Incident Management 7.5.00 User's Guide*.

- 8 To control the sort order of templates, select the sort order.

BMC Remedy Incident Management presents an alphabetical list of templates to the user, unless you override the sort order. You can set the sort order, for example, to put the preferred or most commonly used templates at the top of the list.

- 9 Enter or modify the appropriate details on the template tabs, as described in the following sections:
 - “Classification settings” on page 378.
 - “Categorization settings” on page 379.
 - “Assignment settings” on page 379.
 - “Relationship settings” on page 380.
 - “Resolution settings” on page 381.
 - “Authored for Groups settings” on page 382.
- 10 Click Save.

Classification settings

The values in the Classification tab are used to add information to the corresponding Classification tab in the Incident form. The Classification tab is used to describe the incident and show which products or services are affected by the incident.

► To configure classification settings

- 1 On the Incident Template form, click the Classification tab.
- 2 From the Impact list, select an impact level for the incident form that is created when the template is used.
- 3 From the Urgency list, select a level of urgency for the incident form.

The Priority value is based on the impact and urgency.
- 4 From the Incident Type list, select the type of service that is recorded when the template is used.

The options are: User Service Restoration, User Service Request, Infrastructure Restoration, and Infrastructure Event.
- 5 From the Service list, select the related business service CI, for example, Payroll Service.

This establishes a relationship between Service the incident request.
- 6 In the CI field, type the name of the related CI, for example, Payroll Service.

This establishes a relationship between the CI and the incident request.
- 7 In the Notes field, type a summary of the incident, which appears on the incident ticket.

TIP

Instead of entering the complete description, you can enter prompts for the user who is recording the incident.

- 8 Click Save.

Categorization settings

The values in the Categorization tab are used to add information to the service and product categorization sections of the Classification tab in the Incident form.

- Operational categorization is based on a three-tier hierarchy defined in the Operational Catalog.
- Product categorization is based on a five-tier hierarchy defined in your Product Catalog.

Incident templates can automatically create relationships to customer CIs, as configured here.

► To configure categorization settings

- 1 On the Incident Template form, click the Categorization tab.
- 2 Select the appropriate operational categorizations for Tier 1, Tier 2, and Tier 3.
- 3 Select the appropriate product categorizations for Tier 1, Tier 2, Tier 3, Product Name, and Model/Version.
- 4 To have the template create an automatic relationship to a CI, in addition to the relationships that are already established based on the content of the Service and CI fields, complete the Automatic Relationship of Customer's CI area as follows.

For example, if you are creating a template for email problems, you can set up the template to automatically create a relationship to the CI for the mail server.

To set up the relationship, select items from the following lists on the Categorization tab, and specify the CI on the Relationships tab.

List	Description
Automatic CI Relationship	Select Yes for the template to automatically create the relationship to the CI.
CI Relationship Type	Select how the CI is related to the incident customer. Available selections are Used by, Owned by, Supported by, Managed by, Created by, Approved by, ALL.
Incident Relationship Type	Select how the incident relates to the CI. Available selections are Related to, Restores, Impacts.

- 5 Click Save.

Assignment settings

The values in the Assignment tab are used to add information to two tabs on the Incident form:

- The assignment settings add information to the Assignment tab. Here you configure the support-company, organization, and group that incidents created from the template will be assigned to.

- The vendor assignment settings add information to the Vendor tab. Here you configure the vendor company, organization, and group applicable to the incident.

► To configure assignment settings

- 1 On the Incident Template form, click the Assignment tab.
- 2 To assign the incident to the user creating the incident, in the Assign To Current User field, select Yes. Otherwise, use the following steps for assignment settings:
 - a In the Support Company field, select the company that incidents created from the template will be assigned to.
 - b In the Support Organization field, select an organization.
 - c In the Support Group Name field, select a group.
- 3 Specify vendor assignment settings:
 - a In the Vendor Company field, select the company that is applicable to incidents created from the template.
 - b In the Vendor Organization field, select an organization.
 - c In the Vendor Group Name field, select a group.
- 4 Click Save.

Relationship settings

The values in the Relationships tab are used to add information to the Relationships tab in the Incident form.

This tab is used to relate incidents to specific CIs. For example, an incident template for email incidents might include a relationship to the mail server. Or an incident template for printer incidents might include relationships to commonly supported printers; in this case, the user recording the incident with this template would remove all but the applicable relationship from the Incident form.

► To configure relationship settings

- 1 On the Incident Template form, click the Relationships tab.
- 2 In the Request Type field, select Configuration Item.
The only option is Configuration Item.
- 3 Click Search.
The CI Relationships Search form appears.
- 4 Complete the fields on the search criteria tabs with the relevant information, then click Search.
The matching results are displayed in the CIs table.
- 5 Select the appropriate CI.

- 6 From the Relationship Type list, select the type of relationship to associate the CI with the incident template. For example, Configuration Item.
- 7 Click **Relate**.
A message confirms that the configuration item you selected has been related to the incident template.
- 8 Repeat steps 5 through 7 for all the CIs that you want related to the incident template.
- 9 Close the CI Relationship Search form.
- 10 Click **Save**.

Resolution settings

The values in the Resolutions tab are used to add information to the Resolution tab on the Incident form.

Typically, you use this tab only when creating templates for incidents that can be resolved when they are recorded. For example, this might be used for frequently asked questions, such as how to change your password.

TIP

The resolution details can remind support staff of the steps to resolve an issue. For example, the details could list all the places to check for a paper jam on a printer.

► **To configure resolution settings**

- 1 On the Incident Template form, click the Resolution tab.
- 2 Set the resolution details as follows:
 - a In the Resolution field, type the steps that resolve the incident.
 - b From the Resolution Method list, select On-Site Support, Service Desk assisted, Self-Service, or Remote Control.
 - c Select the appropriate incident cause, for example, Application Error.
- 3 Select the appropriate values from the Resolution Product Categorization Selection lists.

The values that you select here determine the available selections for the resolution categorization selection. The product categorization indicates the category of product.

- 4 Select the appropriate values for the Resolution Categorization Selection fields.
This categorization uses up to three standard menus to indicate the steps to resolve the incident. This is more specific than the resolution method, but might be less detailed than the Resolution field.
- 5 Click **Save**.

Authored for Groups settings

The template authoring group specifies the group that can modify this template. If you have the Support Group Admin functional role or the Incident Config permission, you can assign the template authoring group to any group.

NOTE

A user with Incident Config permission can create a template for any authoring group. The user can modify the template only if he or she is a member of the authoring group.

► **To set groups that can use the template**

- 1 On the Incident Template form, click the Authoring For Groups tab.
- 2 Click Update.
The Template Support Group Association dialog box appears.
- 3 To add groups that can use this template, follow these steps:
 - a Select the company, support organization, and support group.
 - b Click Add.
- 4 Click Close, then click Save.

NOTE

To delete a support group, select it in the list of support groups, then click Delete.

Advanced options

Advanced options include:

- “Incident Management settings” on page 382
- “Rules” on page 384
- “Incident priority and weight ranges” on page 387
- “Configure work info” on page 393

Incident Management settings

From the Incident Management Settings dialog box, you can control the following application settings:

- How the application searches for customer or contact information.
- Whether the application displays the People form after you select a customer or contact.
- How the customer’s or the contact’s name is shown on the incident request form.

These settings are global, that is, they apply to all companies.

NOTE

To perform the following procedures, you must have Incident Config permissions.

Configuring the Customer and Contact search type

You can configure which of the People form fields the application uses to search against when the user types information into either the Customer or the Contact field. This lets the user type some information in the field and then press Enter to return a list of partial matches from which an exact match can be chosen.

You can configure the Customer and the Contact fields to search against one of the following People form fields:

- Corporate ID (default)
- First Name
- Last Name
- Internet Email
- Phone Number

For example, using the default configuration, the application searches against the email address that appears on the People form. Therefore, if the user types AA1 in either the Customer or the Contact field and then presses Enter, the application returns a list of all people whose email address starts with AA1 (Arthur Albertson, Allen Allworth, Anita Alman, and so on).

► To configure the Customer and Contact search type

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Incident Management Settings, then click Open.
- 3 Click Show Settings to populate the Customer and Contact Search Type field with the current setting.
- 4 From the Customer and Contact Search Type list, select the type of search you want.
- 5 Click Add/Modify Settings to save the setting.

Configuring the People form to appear when selecting customer or contact

You can choose to have the People form appear after the service desk analyst selects a customer or a contact name when registering a new incident request. Having the People form appear gives the service desk analyst the ability to see and, if necessary, edit any of the People information on the People form.

The default setting is No, which means the People form does not appear.

► **To configure the People form to appear when selecting a customer or contact**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Incident Management Settings, then click Open.
- 3 Click Show Settings to populate the Customer and Contact Search Type field with the current setting.
- 4 From the Display Customer Info Dialog list, select Yes to have the People form appear.
- 5 Click Add/Modify Settings to save the setting.

Configuring Customer and Contact name format

The customer and contact name format controls how the customer's or the contact's name appears on the Incident Request form. The name format choices are:

- first name, middle name, last name.
- last name, first name, middle name (default).
- last name, first name.

► **To configure the Customer and Contact name format**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Incident Management Settings, then click Open.
- 3 Click Show Settings to populate the Customer and Contact Search Type field with the current setting.
- 4 From the Customer and Contact Name Format list, select the format.
- 5 Click Add/Modify Settings to save the setting.

Rules



Unlike the Incident Management Settings, which apply globally, rules apply to specific companies. For example, you can create incident rules that determine how incident requests are assigned through the Assignment Engine on a company by company basis.

The rules also determine:

- How many days before incident requests with a status of Resolved automatically move to the Closed status.

- Whether you can close an incident request with open tasks.
- Whether to require that you relate a Service CI to the incident request record when it is created.
- Whether to require that you relate a CI to the incident request record when it is resolved.

► To configure incident rules

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Rules, then click Open.
The Incident Rules form appears.
- 3 To modify an existing rule, search for the appropriate rule, and open it.

Figure 13-1: Example of an incident rule

- 4 Select the company to which this rule applies. If it applies to all companies, select Global.
- 5 Select whether certain dates can be changed on the Incident form.

The Changeable Reported Date, Changeable Responded Date, and Changeable Resolution Date fields indicate whether these dates on the Incident form can be modified after the incident has been resolved or closed. These dates can be modified only by a user with the functional role of support group manager or support group lead of the incident owner group, or who the Incident Master permission.

- 6 Select whether to create a request on submission of an incident. If this option is set to Yes, when a user submits an Incident form, a corresponding request is created. The customer can view this request, which indicates the incident status, through the Requester Console.
- 7 In the Description field, you can enter a descriptive note about the rule.
- 8 Select whether the program requires that CI records are related to the incident request record, according to the following rules:
 - **Require Service CI Related On Submit**—Click Yes to ensure a business service CI is related to the incident request record when the incident request record is submitted.
 - **Require CI Related On Resolved**—Click Yes to ensure a CI is related to the incident request record when the user moves the incident request record to the resolved state.
- 9 To configure the number of days after which an incident request automatically moves to the Closed status, type the number of days in the Auto Close Resolved (in Days) field.

NOTE

The number of days is calculated from the Last Resolved Date of the incident request record. The escalation runs daily at 2:00 a.m.

- 10 To use the Assignment Engine to automatically assign incidents to individuals, perform the following steps:
 - a Set Assignment Engine Integration to Yes.
 - b Select the appropriate Assignment Process.

The following table describes the available assignment processes.

Assignment Process	Description
Capacity	The capacity for each person is specified in the Capacity Rating field on the People form. The capacity assignment process is a ratio-based method. For example, if person A has a capacity of 100 and person B has a capacity of 200, person B can handle twice as many tickets as person A; the assignment engine assigns two tickets to B, then assigns one ticket to A.
Number	The People form tracks the number of tickets assigned to the person. The number assignment process selects the person with the least number of tickets already assigned.
Round Robin	The People form keeps track of the last time the person received an assignment. The round robin assignment process selects the person who was least recently assigned an incident.

For information about configuring the assignment engine, see “Working with auto-assignment” on page 200.

- 11 To configure how BMC Remedy Incident Management reacts when an incident request is closed that still has open tasks, select one of the following:
 - **Error Message**—An error message indicates that the user must close all open tasks before closing the incident. The user cannot close the incident until all tasks are closed, because the error stops all workflow processing. *This is the default option.*
 - **No Action**—No error message appears and the user can close the incident even if an open task is associated with it. The task, however, remains open.
 - **Warning Message**—A warning message tells the user that the incident still has an open task associated with it. The user can still close the incident. The task, however, remains open.

NOTE

If a user *Cancels* an incident, all of the associated tasks are also cancelled.

- 12 Click Save.

Incident priority and weight ranges

When users select the impact and urgency of an incident, BMC Remedy Incident Management adds the numerical weights together to calculate the priority weight and assign a descriptive priority, such as Critical.

IMPORTANT

You can make changes to individual global values. To make a change for a specific company, however, you *must* create a complete set of values, weight ranges, and prioritization formulas for the company.

Before you make changes for a specific company, read each of the following topics:

- “Impact values” on page 387
- “Urgency values” on page 389
- “Weight ranges” on page 390
- “Prioritization” on page 391

Impact values

When a user selects the impact and urgency of an incident, BMC Remedy Incident Management adds these numerical weights together to calculate the priority weight.

The impact values, which you configure here, map the four levels of impact to numerical impact weights. You can set the impact weight for each of the four levels of impact. A complete set of global values are installed with BMC Remedy Incident Management.

IMPORTANT

After you change the weight for an impact level, you must reselect the impact in each of the applicable prioritization formulas. For details, see “Prioritization” on page 391.

► **To configure impact values**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Priority and Weight Ranges - Impact Values, then click Open.
The Incident Impact form appears.
- 3 To modify a global impact value, search for the impact value, then open it.

Figure 13-2: Example of an incident impact value

The screenshot shows the 'Incident Impact' form. At the top, there are three dropdown menus: 'Company*' with 'Calbro Services', 'Impact*' with '2-Significant/Large', and 'Impact Weight*' with '5'. To the right is a large 'Description' text area. Below these are several input fields: 'Submitter*' with 'Allen', 'Last Modified By', 'Impact ID' with 'IMP', 'Submit Date', and 'Last Modified Date'. On the right side, there is a 'Status*' section with radio buttons for 'Proposed', 'Enabled' (which is selected), 'Offline', 'Obsolete', 'Archive', and 'Delete'. At the bottom left, there are 'Save' and 'Close' buttons.

IMPORTANT

If you are creating new values for a specific company, you must first read this entire section, starting with “Incident priority and weight ranges” on page 387.

- 4 To create a new value for a specific company perform the following tasks.
 - a Select the company to which this impact value applies.
 - b Select the appropriate impact. For example, if the incident is causing major disruptions to the infrastructure for your entire company you might select 1-Extensive/Widespread. If the incident is affecting one person and that person is still able to work, you might select 4-Minor/Localized.
- 5 Type or select the appropriate impact weight. If the Impact is 1-Extensive/Widespread, you will give it a higher impact number than if the Impact is 4-Minor/Localized.
- 6 In the Description field, you can enter a descriptive note.
- 7 Click Save.

Urgency values

When a user selects the impact and urgency of an incident, BMC Remedy Incident Management adds the numerical weights together to calculate the priority weight.

The urgency values, which you configure here, map the four levels of urgency to numerical urgency weights. You can set the urgency weight for each of the four levels of impact. A complete set of urgency values is installed with BMC Remedy Incident Management.

— **IMPORTANT** —

After you change the weight for an urgency level, you must reselect the urgency in each of the applicable prioritization formulas. For details, see “Prioritization” on page 391.

► To configure urgency values

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Priority and Weight Ranges - Urgency Values, then click Open.
The Incident Urgency form appears.
- 3 To modify a global urgency, search for the appropriate urgency, then open it.

Figure 13-3: Example of an incident urgency value

The screenshot shows the 'Incident Urgency' form. At the top, there is a 'Company*' dropdown menu with 'Calbro Services' selected. To its right is a 'Description' text area. Below the company field is the 'Urgency*' dropdown menu with '1-Critical' selected. To its right is another 'Urgency Weight*' dropdown menu with '20' selected. Below these are several input fields: 'Submitter*' with 'Allen', 'Last Modified By', and 'Urgency ID' with 'SCP'. To the right of these fields are 'Submit Date' and 'Last Modified Date' fields. At the bottom right, there is a 'Status*' section with radio buttons for 'Proposed', 'Enabled' (which is selected), 'Offline', 'Obsolete', 'Archive', and 'Delete'. At the very bottom of the form are 'Save' and 'Close' buttons.

— **IMPORTANT** —

If you are creating new values for a specific company, you must first read this entire section, starting with “Incident priority and weight ranges” on page 387.

- 4 To create a new value for a specific company perform the following tasks.
 - a Select the company to which this urgency value applies.
 - b Select the appropriate urgency.
- 5 Type or select the appropriate urgency weight.

- 6 In the Description field, you can enter a descriptive note.
- 7 Click Save.

Weight ranges

When a user selects the impact and urgency of an incident, BMC Remedy Incident Management adds the numerical weights together to calculate the weight.

The weight ranges that you configure here determine the descriptive priority (such as Critical) displayed on the Incident form. A complete set of priority weight ranges is installed with BMC Remedy Incident Management.

IMPORTANT

After you change a weight range, you must reselect the impact and urgency in each of the applicable prioritization formulas. For details, see “Prioritization” on page 391.

► To configure weight ranges

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Priority and Weight Ranges - Weight Ranges, then click Open.

The Incident Priority Weight Ranges form appears.

- 3 To modify a global priority weight range, search for the appropriate weight range, then open it.

Figure 13-4: Example of priority weight ranges

The screenshot shows the 'Incident Priority Weight Ranges' configuration form. At the top, there are dropdown menus for 'Company*' (set to 'Calbro Services') and 'Priority*' (set to 'Critical'), followed by a 'Description' text area. Below this is the 'Priority Weight Range' section, which includes 'Greater Than or Equal To' (set to 24) and 'and Less Than or Equal To' (set to 35) dropdowns. A bottom section contains 'Submitter*' (Allen), 'Last Modified By', 'Priority Weight Ranges ID' (PWR), and 'Submit Date' and 'Last Modified Date' fields. On the right, there are 'Status*' radio buttons for Proposed, Enabled (selected), Offline, Obsolete, Archive, and Delete. At the bottom left, there are 'Save' and 'Close' buttons.

IMPORTANT

If you are creating new priority weight ranges for a specific company, you must first read this entire section, starting with “Incident priority and weight ranges” on page 387.

- 4 To create a new priority weight range for a specific company perform the following tasks.
 - a Select the company to which this priority weight ranges applies.
 - b Select the priority for which you are defining the weight range.

There are four priorities available: Critical, High, Medium, and Low.
- 5 In the Priority Weight Range area, enter or select the lower and upper ends of the weight range as Priority Weight Range 1 and Priority Weight Range 2.
- 6 In the Description field, you can enter a descriptive note.
- 7 Click Save.
- 8 Repeat this procedure to define the weight range for each of the four priorities.

Prioritization

When a user selects the impact and urgency of an incident, BMC Remedy Incident Management adds the numerical weights together to calculate the priority weight and assign a descriptive priority, such as Critical.

The Incident Prioritization form displays the prioritization formulas. A complete set of global prioritization formulas is installed with BMC Remedy Incident Management.

IMPORTANT

If you change the weight for an impact or urgency level or if you change any priority weight ranges, you must reselect the impact or urgency in the applicable prioritization formulas.

► **To configure prioritization**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Priority and Weight Ranges - Prioritization, then click Open.

The Incident Prioritization form appears.

- To modify a global prioritization formula, search for the appropriate prioritization, then open it.

Figure 13-5: Example of incident prioritization

The screenshot shows the 'Incident Prioritization' configuration window. It features several input fields and dropdown menus. The 'Company*' field is set to 'Calbro Services'. The 'Impact*' dropdown is '2-Significant/Large', with 'Impact Weight*' set to '5'. The 'Urgency*' dropdown is '1-Critical', with 'Urgency Weight*' set to '20'. The 'Priority*' dropdown is 'Critical', with 'Priority Weight*' set to '25'. There is a 'Description' field on the right. At the bottom, there are fields for 'Submitter*' (Allen), 'Last Modified By', and 'Prioritization ID' (PRI). A 'Status*' section contains radio buttons for 'Proposed', 'Enabled' (selected), 'Offline', 'Obsolete', 'Archive', and 'Delete'. 'Save' and 'Close' buttons are at the bottom left.

IMPORTANT

If you are creating new prioritization formulas for a specific company, you must first read this entire section, starting with “Incident priority and weight ranges” on page 387.

- To create a new prioritization formula for a specific company, select the company to which this prioritization applies.
- As appropriate, select or reselect the impact level from the Impact list.
The value of the Impact Weight field is updated to the current value from the Configure Incident Impact form.
- As appropriate, select or reselect the urgency level from the Urgency list.
The value of the Urgency Weight field is updated to the current value from the Configure Incident Urgency form.
- In the Description field, you can enter a descriptive note.
- Click Save.
- Repeat steps 3 through 8 for each prioritization formula that contains a changed impact weight or changed urgency weight.

Configure work info

Enables you to configure the work info types to add to the totals in the Inbound and Outbound fields on the Incident Request console in the Classic view.

NOTE

The Inbound and Outbound fields are read-only counters that enable users to quickly view the types of work info entered in the incident.

► **To configure work info**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Advanced Options > Work Info Inbound and Outbound Communications, then click Open. The Configure Work Info form appears.
- 3 Select the company, or select Global to configure work info for all companies.
- 4 In the Work Info Module field, select Incident.
- 5 In the Work Info Type field, select the work info type field to configure.
- 6 In the Communication Type field, select Inbound or Outbound.
- 7 Select the status.
- 8 Click Save.

Chapter **14** Configuring BMC Remedy Problem Management

This section covers configuration features that are specific to BMC Remedy Problem Management.

The following topics are provided:

- Rules (page 396)
- Priority and weight ranges (page 398)

Rules



You can configure BMC Remedy Problem Management with rules that best suit your organization’s business needs. BMC Remedy Problem Management rules determine how problem investigations, solution database entries, and known errors are assigned through the Assignment Engine.

The rules also determine how many days before problem investigations with a status of Completed and known errors with a status of Corrected automatically move to the Closed status.

NOTE

To update a rule, use the instructions in the following procedure, changing the rule

► **To configure or update BMC Remedy Problem Management rules**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose BMC Remedy Problem Management > Advanced Options > Rules, then click Open.
The Configure Problem Rules form appears.
- 3 To modify an existing rule, search for the rule, then open it.

Figure 14-1: Example problem rule

- 4 Select the company to which this rule applies. If it applies to all companies, select Global.
- 5 In the Description field, enter a brief description of the rule.

- 6 To use the assignment engine to automatically assign problem investigations, known errors, and solution database entries to individuals, perform the following steps:
 - a Set Assignment Engine Integration to Yes.
 - b For the role being assigned, select how assignments are routed.

You can select the assignment process problem managers or assignees for problems, solution database entries, and known errors. For example, the Problem Manager Assignment Process (Problem) list value determines the process for automatically assigning a problem manager to an investigation. The following table describes the available assignment processes.

Assignment process	Description
Capacity	The capacity for each person is specified in the Capacity Rating field on the People form. The capacity assignment process is a ratio-based method. For example, if person A has a capacity of 100 and person B has a capacity of 200, person B can handle twice as many tickets as person A; the assignment engine assigns two tickets to B, then assigns one ticket to A.
Number	The People form tracks the number of tickets assigned to the person. The number assignment process selects the person with the least number of tickets already assigned.
Round Robin	The People form keeps track of the last time the person received an assignment. The round robin assignment process selects the person who was least recently assigned a service request.

For information about configuring the Assignment Engine, see “Working with auto-assignment” on page 200.

- 7 To configure the number of days after which a problem investigation or known error automatically move to the Closed status, type the number of days in the Problem Auto Close Completion (in Days) and the Known Error Auto Close Corrected (in Days) fields.

NOTE

The number of days is calculated from the Last Completed Date of the problem investigation record and the Last Corrected Date of the known error record. The escalation runs daily at 2:00 a.m.

- 8 Click Save.

Priority and weight ranges

When a user selects the impact and urgency of a problem investigation or a known error, BMC Remedy Problem Management adds the numerical weights together to calculate the priority weight and assign a descriptive priority, such as Critical.

IMPORTANT

You can make changes to individual global values. To make a change for a specific company, however, you *must* create a complete set of values, weight ranges, and prioritization formulas for the company.

Before you make changes for a specific company, read each of the following topics:

- “BMC Remedy Problem Management impact” on page 398
- “Problem urgency” on page 399
- “Problem priority weight ranges” on page 401
- “Problem prioritization” on page 402

BMC Remedy Problem Management impact

When a user selects the impact and urgency of a problem investigation or a known error, BMC Remedy Problem Management adds these numerical weights together to calculate the priority weight.

The impact values, which you configure here, map the four levels of impact to numerical impact weights. You can set the impact weight for each of the four levels of impact for both problem investigations and known errors. A complete set of global values are installed with BMC Remedy Problem Management.

IMPORTANT

After you change the weight for an impact level, you must reselect the impact in each of the applicable prioritization formulas. For details, see “Problem prioritization” on page 402.

► To configure problem impact

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Problem Management > Advanced Options > Priority and Weight Ranges - Impact Values, then click Open.

The Configure Problem Impact form appears.

- 3 To modify a global value, search for the impact value, then open it.

Figure 14-2: Configure Problem Impact form

The screenshot shows a web form titled "Configure Problem Impact". The form contains the following fields and controls:

- Form Name***: A dropdown menu with "PBM:Known Error" selected.
- Company***: A dropdown menu with "Calbro Services" selected.
- Impact***: A dropdown menu with "1-Extensive/Widespread" selected.
- Impact Weight***: A numeric input field with "9" entered.
- Description**: A large text area for entering a descriptive note.
- Submitter***: A text field with "Allen" entered.
- Status***: A group of radio buttons with options: Proposed, Enabled (selected), Offline, Obsolete, Archive, and Delete.
- Last Modified By**: A text field.
- Last Modified Date**: A date field.
- Impact ID**: A text field with "PIM" entered.
- Submit Date**: A date field.

At the bottom of the form are "Save" and "Close" buttons.

— **IMPORTANT** —

If you are creating new values for a specific company, you must first read this entire section, starting with "Priority and weight ranges" on page 398.

- 4 To create a new value for a specific company perform the following tasks.
 - a From the Form Name list, select whether this impact value applies to problem investigations or known errors.

— **NOTE** —

If an impact value applies to both problem investigations and known errors, you must create two impact values: one for the Problem Investigation form and the other for the Known Error form.

- b Select the company to which this impact value applies.
 - c Select the appropriate impact.
- 5 Enter or select the appropriate impact weight.
- 6 In the Description field, you can enter a descriptive note.
- 7 Click Save.

Problem urgency

When the user selects the impact and urgency of a problem investigation or a known error, BMC Remedy Problem Management adds the numerical weights together to calculate the priority weight.

The urgency values, which you configure here, map the four levels of urgency to numerical urgency weights. You can set the urgency weight for each of the four levels of impact for both problem investigations and known errors. A complete set of global values are installed with BMC Remedy Problem Management.

IMPORTANT

After you change the weight for an urgency level, you must reselect the urgency in each of the applicable prioritization formulas. For details, see “Problem prioritization” on page 402.

► **To configure problem urgency values**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Problem Management > Advanced Options > Priority and Weight Ranges - Urgency Values, then click Open.
The Configure Problem Urgency form appears.
- 3 To modify a global urgency, search for the appropriate urgency, then open it.

Figure 14-3: Example of problem urgency value

The screenshot shows the 'Configure Problem Urgency' form with the following details:

- Form Name*:** PBM:Problem Investigation
- Company*:** Calbro Services
- Urgency*:** 1-Critical
- Urgency Weight*:** 20
- Description:** (Empty text area)
- Submitter*:** Allen
- Last Modified By:** (Empty)
- Urgency ID:** PSP
- Status*:**
 - Proposed
 - Enabled
 - Offline
 - Obsolete
 - Archive
 - Delete
- Submit Date:** (Empty)
- Last Modified Date:** (Empty)
- Buttons:** Save, Close

IMPORTANT

If you are creating new values for a specific company, you must first read this entire section, starting with “Priority and weight ranges” on page 398.

- 4 To create a new value for a specific company perform the following tasks.
 - a From the Form Name list, select whether this urgency value applies to problem investigations or known errors.
 - b Select the company to which this urgency value applies.
 - c Select the appropriate urgency.
- 5 Type or select the appropriate urgency weight.
- 6 In the Description field, you can enter a descriptive note.
- 7 Click Save.

Problem priority weight ranges

When the user selects the impact and urgency of a problem investigation or a known error, BMC Remedy Problem Management adds the numerical weights together to calculate the priority weight.

The priority weight ranges that you configure here determine the descriptive priority (such as Critical) displayed on the problem investigation or known error. A complete set of global priority weight ranges is installed with BMC Remedy Problem Management.

— **IMPORTANT** —

After you change a priority weight range, you must reselect the impact and urgency in each of the applicable prioritization formulas. For details, see “Problem prioritization” on page 402.

► To configure problem priority weight ranges

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Problem Management > Advanced Options > Priority and Weight Ranges - Priority Weight Ranges, then click Open. The Configure Problem Priority Weight Ranges form appears.
- 3 To modify a global priority weight range, search for the appropriate weight range, then open it.

Figure 14-4: Example of priority weight ranges for problem investigations

The screenshot shows the 'Configure Problem Priority Weight Ranges' form. The form has the following fields and values:

- Form Name***: PBM:Problem Investigation
- Company***: Calbro Services
- Priority***: Critical
- Set Ranges**: Priority Weight Range 1* (24) <= Priority Weight <= Priority Weight Range 2* (35)
- Submitter***: Allen
- Status***: Proposed, Enabled, Offline, Obsolete, Archive, Delete
- Priority Weight Ranges ID**: PRG

Buttons at the bottom include 'Save' and 'Close'.

— **IMPORTANT** —

If you are creating new weight ranges for a specific company, you must first read this entire section, starting with “Priority and weight ranges” on page 398.

- 4 To create a new value for a specific company perform the following tasks.
 - a From the Form Name list, select whether this weight range applies to problem investigations or known errors.
 - b Select the company to which this weight range applies.
 - c Select the priority for which you are defining the weight range.

There are four priorities available: Critical, High, Medium, and Low.
- 5 In the Set Ranges area, type or select the lower (Priority Weight Range 1) and upper (Priority Weight Range 2) ends of the weight range.
- 6 In the Description field, you can enter a descriptive note.
- 7 Click Save.
- 8 Repeat this procedure to define the weight range for each of the four priorities for both problem investigations and known errors.

Problem prioritization

When a user selects the impact and urgency of a problem investigation or a known error, BMC Remedy Problem Management adds the numerical weights together to calculate the priority weight and assign a descriptive priority, such as Critical.

The Configure Problem Prioritization form displays the prioritization formulas. A complete set of global prioritization formulas is installed with BMC Remedy Problem Management.

IMPORTANT

If you change the weight for an impact or urgency level, or change a priority weight range, you must reselect the impact or urgency in the applicable prioritization formulas.

► **To configure problem prioritization**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Problem Management > Advanced Options > Priority and Weight Ranges > Prioritization.

The Configure Problem Prioritization form appears.

- 3 To modify a global prioritization formula, search for the appropriate prioritization, then open it.

Figure 14-5: Example of problem prioritization

The screenshot shows a web form titled "Configure Problem Prioritization". The form contains several sections:

- Form Name***: A dropdown menu with "PBM:Problem Investigation" selected.
- Company***: A dropdown menu with "Calbro Services" selected.
- Impact***: A dropdown menu with "2-Significant/Large" selected.
- Impact Weight***: A numeric input field with "5" entered.
- Urgency***: A dropdown menu with "1-Critical" selected.
- Urgency Weight***: A numeric input field with "20" entered.
- Priority***: A dropdown menu.
- Priority Weight***: A numeric input field with "25" entered.
- Description**: A large text area.
- Submitter***: A text field with "Allen" entered.
- Status***: A group of radio buttons with options: Proposed, Enabled (selected), Offline, Obsolete, Archive, and Delete.
- Last Modified By**: A text field.
- Last Modified Date**: A text field.
- Prioritization ID**: A text field with "PPR" entered.

At the bottom of the form, there are "Save" and "Close" buttons.

IMPORTANT

If you are creating new prioritization formulas for a specific company, you must first read this entire section, starting with "Priority and weight ranges" on page 398.

- 4 To create a new prioritization formula for a specific company perform the following tasks.
 - a From the Form Name list, select whether this prioritization formula applies to problem investigations or known errors.
 - b Select the company to which this prioritization applies.
- 5 As appropriate, select or reselect the impact level from the Impact list.
The value of the impact weight is updated to the current value from the Configure Problem Impact form.
- 6 As appropriate, select or reselect the urgency level from the Urgency list.
The value of the urgency weight is updated to the current value from the Configure Problem Urgency form.
- 7 In the Description field, you can enter a descriptive note.
- 8 Click Save.
- 9 Repeat steps 3 through 8 for each prioritization formula that contains a changed impact weight or changed urgency weight.

Chapter 15 **Configuring BMC Remedy Asset Management**

This section covers configuration features that are specific to the BMC Remedy Asset Management application.

The following topics are provided:

- [Advanced options \(page 406\)](#)
- [Approval Process for CI Configurations \(page 462\)](#)
- [CMDB Class Manager Console \(page 463\)](#)
- [Asset Reconciliation Configuration Console \(page 463\)](#)

Advanced options

This section describes how to configure the BMC Remedy Asset Management advanced options. This section includes the following topics:

- “BMC Remedy Asset Management settings” on page 406
- “Bulk CI Reorder Level and Lead Time Specification” on page 408
- “CI Deletion” on page 410
- “CI Depreciation Criteria” on page 411
- “CI Notifications” on page 414
- “CI Unavailability Status” on page 416
- “Configure License Type” on page 417
- “Create Contract type” on page 452
- “Configure Inbox Preferences” on page 453
- “License Engine Configuration” on page 455
- “Rules” on page 456
- “Sync Asset UI with CMDB” on page 459
- “Unavailability Priority” on page 461

BMC Remedy Asset Management settings

You use the Asset Management Settings form to configure what happens when a configuration item (CI) is saved in a particular dataset. These settings include designating the sandbox and production datasets.

Understanding the sandbox and production datasets

When multiple sources update the BMC Atrium Configuration Management Database (BMC Atrium CMDB), there must be some control on how the data is updated. Without control, BMC Atrium CMDB can become loaded with unintended data. BMC Atrium CMDB and BMC Remedy Asset Management provides a control mechanism: the sandbox dataset. This mechanism is the sandbox dataset. BMC Remedy Asset Management is installed with the sandbox dataset set to BMC.ASSET.SANDBOX and the production dataset set to BMC.ASSET.

An administrator defines what sources of updates have the most appropriate information to load into the production data, and can disable the sandbox. Users do not make changes directly to production data, unless the sandbox is disabled. When a user modifies data, the data flows through a temporary storage area (the sandbox dataset), and then runs through the Reconciliation Engine. The Reconciliation Engine determines which modified attributes to also modify into the production data. This guide describes this procedure.

— **IMPORTANT** —

During reconciliation, some updates might not get updated in the production dataset. The system can be configured to treat another data source as a higher precedence than the data being entered through BMC Remedy Asset Management. If two data sources make updates, the data source with the highest precedence determines the production dataset.

For more information about the BMC Atrium CMDB, see *BMC Atrium CMDB User's Guide*, *BMC Atrium CMDB Administrator's Guide*, and *BMC Atrium CMDB CDM Common Data Model Diagram*. For more information about the sandbox dataset, also referred to as an *overlay dataset*, see the *BMC Atrium Core Concepts and Planning Guide*.

Configuring BMC Remedy Asset Management settings

Follow this procedure to configure BMC Remedy Asset Management settings.

► To configure BMC Remedy Asset Management settings

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Asset Management Settings, and then click Open.

The Asset Management Settings form appears as shown in Figure 15-1.

Figure 15-1: Asset Management Settings form

The screenshot shows the 'Asset Management Settings' form within the BMC Remedy IT Service Management interface. The form is titled 'Asset Management Settings' and is located under the 'Asset Management' section. It contains several configuration options:

- Action on CI Submit:** A dropdown menu set to 'None' with a 'Show Settings' button next to it. A tooltip explains that this setting indicates the action taken when a CI is submitted, with options like 'None' or 'Modify Individual'.
- Dataset Name:** A dropdown menu set to 'BMC Asset'. A tooltip explains that this specifies the production dataset for the application.
- Dataset Access:** A dropdown menu set to 'Writable'.
- Sandbox Dataset Name:** A dropdown menu set to 'BMC.ASSET.SANDBOX'. A tooltip explains that this specifies the sandbox dataset for the application.
- Sandbox Enabled:** A dropdown menu set to 'Yes'.
- Server Date Format:** A dropdown menu set to 'MM/DD/YY'. A tooltip explains that this setting must match the date format on the server and is used for calculating CI depreciation dates.

At the bottom of the form, there are three buttons: 'Add', 'Modify', and 'Close'.

- 3 On the Asset Management Settings form, to show the current settings, click Show Settings.

- 4 From the Action on CI Submit, select one of the following options:
 - Modify Individual**—Closes the CI form, and then reopens it in modify mode.
 - None**—The CI form remains open in submit mode after the CI is submitted.
- 5 From the Dataset Name list, select the production dataset for the application.
- 6 From the Sandbox Dataset Name list, specify the sandbox dataset.

IMPORTANT

If multiple sources of data provide updates to BMC Atrium CMDB, you must specify a sandbox dataset.

This dataset is used to stage updates to a production dataset. You are required to use reconciliation rules to move the data to production.

IMPORTANT

If you change the production or sandbox datasets on this form, in the Reconciliation Engine you must update the underlying reconciliation rules “BMC Asset Management – Sandbox” to use the new datasets. Without this change, the data cannot be reconciled to the new production or sandbox datasets.

If you use a sandbox dataset, BMC Remedy Asset Management users cannot set their application preferences to display the CI immediately after creating it.

- 7 If the sandbox dataset is used in a development-to-production environment, select Yes from the Sandbox Enabled list. This is the default.
- 8 From the Server Date Format list, select the date format to use when calculating CI depreciation dates.

This setting must match the date format on the BMC Remedy Action Request System (BMC Remedy AR System) server. If you change this setting, you must restart your BMC Remedy AR System server.

- 9 To save the settings, do one of the following steps:
 - If you are saving the settings for the first time, click Add.
 - If you are modifying existing settings, click Modify.

Bulk CI Reorder Level and Lead Time Specification

The Bulk CI Reorder Level and Lead Time Specification configuration feature applies to the BMC Remedy Asset Management application and uses CIs in the BMC Remedy Incident Management and BMC Remedy Change Management applications.

This configuration feature is used to configure reorder information for bulk CIs. When using this configuration feature, you can specify at what level (or quantity) an item for the specified categorization combination should be reordered. For example, you might want to reorder printer cables when their quantity drops to 20. In addition, you can also specify the number of lead days needed to reorder that particular bulk CI. This information is used to prefill the Inventory Management form.

► **To configure purchase reorder levels**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Bulk CI Reorder Level and Lead Time Specification, and then click Open.

The Configure Recorder Levels for Bulk Assets form appears as shown in Figure 15-2.

Figure 15-2: Configure Reorder Levels for Bulk Assets form

The screenshot shows a web application window titled "BMC REMEDY IT SERVICE MANAGEMENT - Asset Management" with a "Help" link and the BMC Software logo. The main content area is titled "Configure Reorder Levels for Bulk Assets". It contains several input fields and dropdown menus: "Company" (ABC Company), "Product Categorization Tier 1*" (Hardware), "Product Categorization Tier 2*" (Inventory), "Product Categorization Tier 3*" (Laptop), "Base Unit" (Each), "Reorder Level" (5), and "Lead Time in Days" (15). A "Select Existing" button is next to the Company field. At the bottom, there are "Add", "Modify", "Delete", "Close", and "Clear" buttons.

- 3 From the Company field, select the company to which this reorder applies.
- 4 From the Categorization Tier lists, select the categorization of the CI that you want to reorder.
- 5 From the Base Unit list, select Case, Dozen, or Each.
- 6 Enter the Reorder Level.
This is the quantity at which you want to reorder this item.
- 7 Enter the Lead Time in Days.
This is the number of days it takes to reorder this particular item.
- 8 Click Add.

► To modify or delete purchase reorder levels

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Bulk CI Reorder Level and Lead Time Specification, and then click Open.
- 3 On the Configure Reorder Levels for Bulk Assets form, click Select Existing.
A list of existing bulk item configurations appears.
- 4 In the Select Existing Reorder Level dialog box, select the item to modify or delete, and click Select.
- 5 Perform one of the following actions:
 - Edit the fields that you want to modify and then click Modify.
 - Click Delete.

CI Deletion

When you use the following procedure to delete CIs, they are not removed from the database at the time you complete this procedure. The BMC Atrium CMDB reconciliation process deletes the CIs from the database. For more information about reconciliation, see the *BMC Atrium CMDB Normalization and Reconciliation Guide*.

— NOTE —

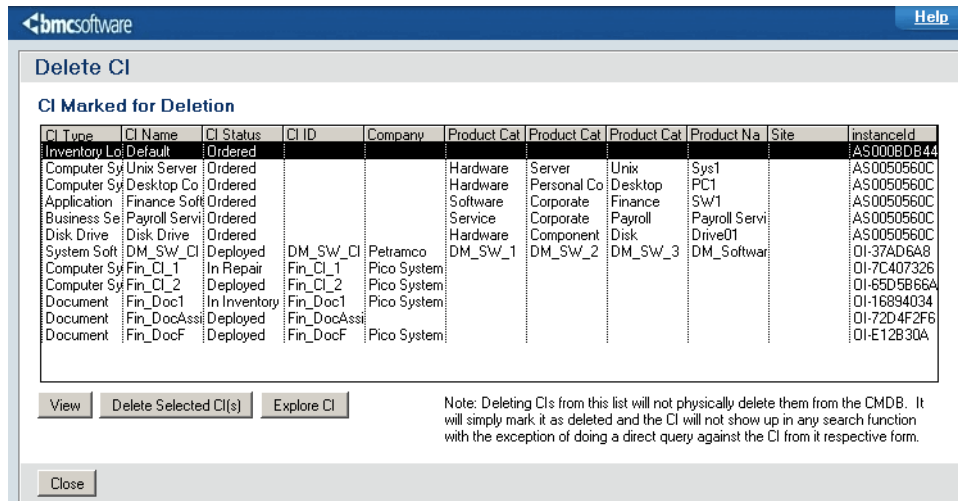
This feature does not physically delete CIs from the CMDB. Instead, it marks them for deletion, which prevents the CIs from showing up in a search unless they are directly queried from their respective CMDB forms.

► To delete CIs

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > CI Deletion, and then click Open.

The Delete CI form appears as shown in Figure 15-3.

Figure 15-3: Delete CI form



- 3 On the Delete CI form, before you delete a CI, you can view the CI and its relationships to other CIs.
 - To view a CI, select the CI and click View. The CI form appears. After you view details of the CI, click Close.
 - To view the relationship of a CI to other CIs, select the CI and click Explore CI. The BMC Atrium Explorer appears. After you view the CI relationships, click Close.
- 4 From the CI Marked for Deletion table, select the CIs you want to delete, and click Delete Selected CIs.

The CIs are deleted from the table and marked for deletion in the CMDB.

CI Depreciation Criteria

The CI Depreciation Criteria Configuration feature enables you to define the default depreciation method to use for a specific CI categorization, including CI type, region, and status.

► To configure depreciation criteria for a specific CI categorization

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > CI Depreciation Criteria, and then click Open.

The Configure Depreciation Criteria form appears as shown in Figure 15-4.

Figure 15-4: Configure Depreciation Criteria form

The screenshot shows the 'Configure Depreciation Criteria' form in the BMC Remedy IT Service Management - Asset Management interface. The form is titled 'Configure Depreciation Criteria' and includes a 'Help' button and the BMC Software logo. The form contains the following fields and values:

- CI Type***: Computer System
- Primary Capability**: Mobile User Device
- Company +**: ABC Company
- Product Categorization Tier 1**: Hardware
- Product Categorization Tier 2**: Personal Computer
- Product Categorization Tier 3**: Laptop
- Region**: South
- Status***: Active
- Method***: Declining Balance (150%)
- Useful Life (months)***: 48
- Salvage Value (%)**: 10

Below the fields, there is a note: 'Specify the default depreciation method to be used for CIs created that match the above criteria.' At the bottom of the form, there are buttons for 'Add', 'Modify', 'Delete', and 'Close'.

- 3 On the Configure Depreciation Criteria form, from the CI Type list, select the CI type for which you are configuring depreciation.
If you select a CI Type of Computer System or Mainframe the Primary Capability list becomes available.
- 4 From the Primary Capability list, optionally, select the primary capability of the CIs for which you are configuring depreciation.
For example, choose whether this depreciation that applies to CIs that are primarily routers, access servers, or mobile user devices.
- 5 From the Company list, select the company that contains the CIs you want to configure depreciation for.
- 6 Using the Categorization Tier lists, categorize the CI to which this depreciation applies.
- 7 In the Region field, optionally enter or select a region.
- 8 From the Status list, select Active or Inactive for this depreciation criteria.
- 9 From the Method list, select the depreciation method to use for this category of CIs.
For more information about depreciation methods, see the *BMC Remedy Asset Management User's Guide*.
- 10 In the Useful Life (months) field, enter the number of months this category of CIs is expected to be in use.

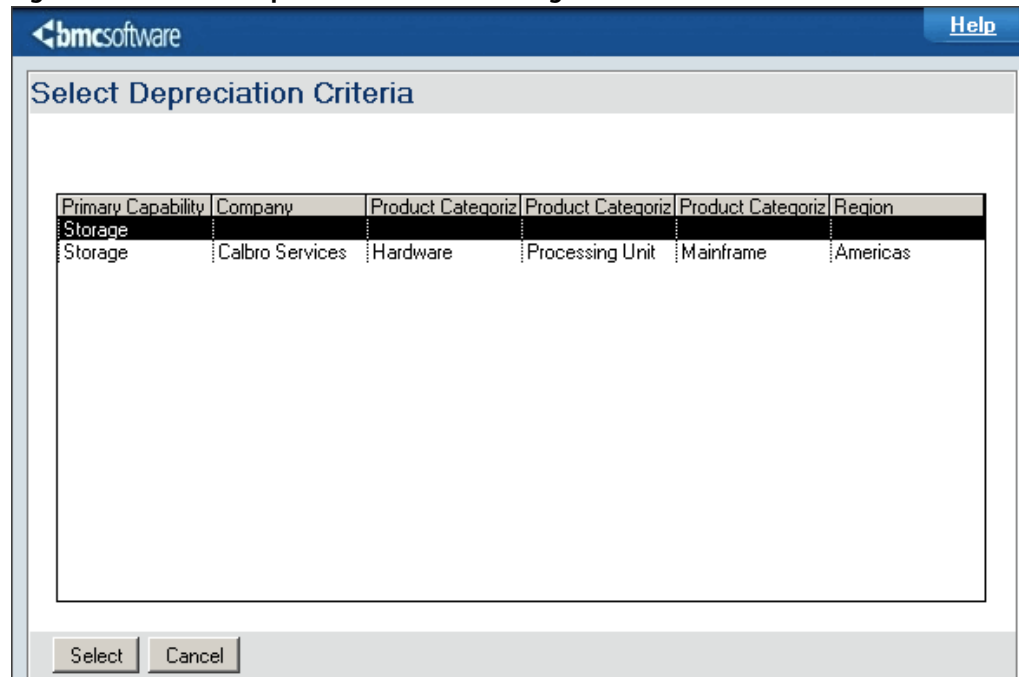
- 11 In the Salvage Value % (% of Purchase Cost) field, optionally enter the estimated percentage of the total purchase cost that this category of CIs will realize at the end of its useful life.
- 12 Click Add.

► **To modify or delete depreciation criteria for a category of CIs**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > CI Depreciation Criteria, and then click Open.
- 3 Click Select Depreciation Criteria.

The Select Depreciation Criteria form appears as shown in Figure 15-5.

Figure 15-5: Select Depreciation Criteria dialog box



- 4 In the Select Depreciation Criteria dialog box, select a category of CIs to modify or delete, and click Select.
- 5 Perform one of the following steps:
 - Edit any of the fields and click Modify.
 - Click Delete to delete the category of CIs.

CI Notifications

The CI Notifications feature applies only to the BMC Remedy Asset Management application.

You use this feature to configure CI notifications so that when a CI's status is set to a particular option, the person who uses, manages, or supports (and so on) the CI is notified.

When the status code for a CI changes, the status code value is automatically compared with the contents of the Configure CI Notifications form.

When a match is found, the appropriate person on the CI is notified of the status change. The notification is sent by the method specified in the People form.

CI Notifications can be configured, for example, to notify the people when the computer systems they support go down.

► To create CI notifications

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > CI Notifications, and then click Open.

The Configure CI Notifications form appears as shown in Figure 15-6.

Figure 15-6: Configure CI Notifications form

The screenshot shows the 'Configure CI Notifications' form within the BMC Remedy IT Service Management - Asset Management application. The form contains several dropdown menus and text input fields. The 'CI Status*' dropdown is set to 'Down'. The 'Who to Notify*' dropdown is set to 'Supported by'. The 'CI Type*' dropdown is set to 'Computer System'. The 'Company+' dropdown is set to 'Calbro Services'. The 'Product Categorization Tier 1' dropdown is set to 'Hardware'. The 'Product Categorization Tier 2' dropdown is set to 'Processing Unit'. The 'Product Categorization Tier 3' dropdown is set to 'Other Type of Processing Unit'. The 'Product Name+' and 'Model/Version' fields are empty. A 'Select Notifications' button is located to the right of the 'CI Status*' dropdown. A note at the bottom of the form reads: 'Note: CI Notifications only apply to Individuals and Support Groups that are related to the CI'. At the bottom of the form, there are four buttons: 'Add', 'Modify', 'Delete', and 'Close'.

- 3 From the CI Status list, select a status.

To create a CI notification to notify support people when computer systems go down, select Down.

TIP

You can click Select Notifications to view the list of all combinations of CI notifications stored in the Configure CI Notifications form.

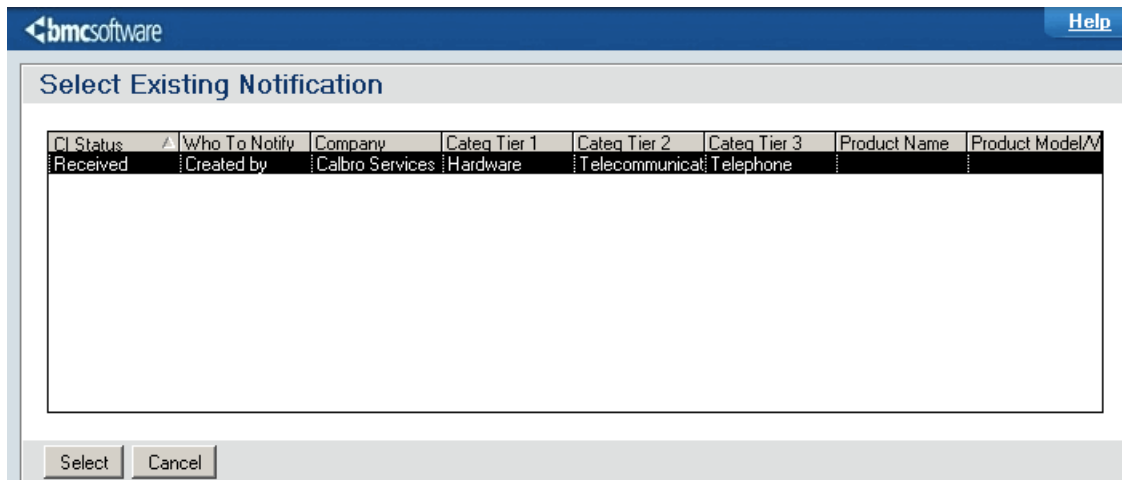
- 4 From the Who to Notify list, select who should be notified based on whether they own, support, or created (and so on) the CI.
To continue with the example, select Supported By.
- 5 From the CI Type list, select the type of CI this notification is based on.
For example, if you select a CI Type of Computer System, and then the notification applies only to computer systems.
- 6 To continue with the example, select System > Computer System.
- 7 Optionally, you can further restrict the notification based on company and product categorization by performing the following steps:
 - a From the Company list, select the company to which the CI belongs.
To continue with the example, select Calbro Services.
 - b From the Categorization Tier lists, select the categorization structure of the CIs you want to flag for notification.
To continue with the example, select Hardware for Product Categorization Tier 1, Processing Unit for Product Categorization Tier 2, and Other Type of Processing Unit for Product Categorization Tier 3.
 - c Select a Product Name and product Model/Version.
- 8 Click Add to create a notification for this CI categorization combination.
- 9 Repeat the procedure to create notifications for each combination of CI status and person who should be notified.

► To modify or delete CI notifications

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > CI Notifications, and then click Open.
- 3 On the Configure CI Notifications form, click Select Notifications.

The Select Existing Notification dialog box is displayed, as shown in Figure 15-7, listing the various notification combinations configured for your site (including default notifications).

Figure 15-7: Select Existing Notification dialog box



- 4 Select the notification to modify or delete and click Select.
The selected notification information is added to the form.
- 5 Perform one of the following actions:
 - Edit any of the fields and click Modify.
 - Click Delete to delete the notification.

CI Unavailability Status

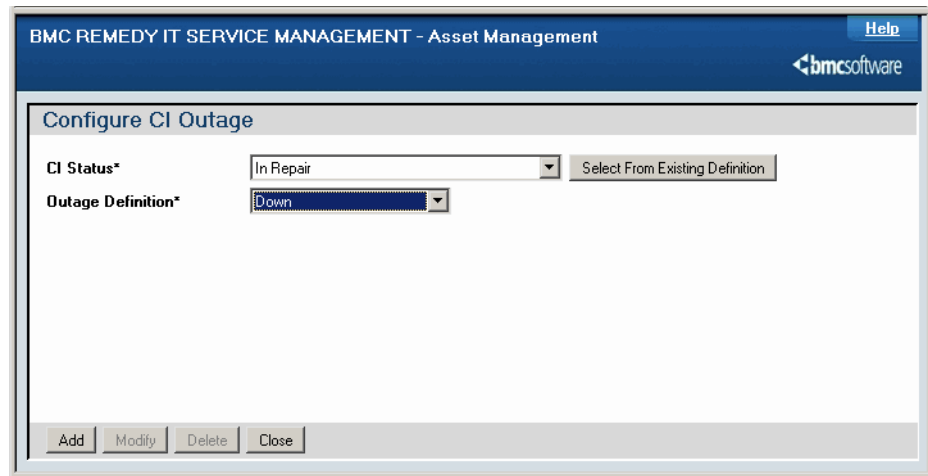
Use this feature to configure whether a CI is determined to be down or up, depending on its status. For example, if a CI is being assembled, you might want to configure it to be down while it is in production.

► To configure the unavailability status for a CI

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > CI Unavailability Status, and then click Open.

The Configure CI Outage form appears as shown in Figure 15-8.

Figure 15-8: Configure CI Outage form



- 3 Form, from the CI Status list, select the CI status for which you want to configure unavailability.
- 4 From the Outage Definition list, select Down or Up.
- 5 Click Add.

TIP

You can click Select From Existing Definition to select a previously defined unavailability status from the list displayed.

Configure License Type



License types are used for software license management. The license type wizard allows administrators with Contract Config or Asset Config permissions to create custom license types for license certificates. After the license type wizard has been completed and the license type has been saved, the license types are used when a contract manager or software asset manager creates certificates.

When the license engine runs, company and product information and answers to questions supplied when the certificate was created are used to determine which CIs should be connected to the license certificates. Compliance is also calculated based on the answers to questions supplied and the configured compliance actions which act on these values.

For more information about configuring the license engine to run jobs, see “Configure License Engine Run” on page 458 and “License Engine Configuration” on page 455. For more information about running jobs, see the *BMC Remedy Asset Management User’s Guide*.

You can use license types to specify the following information:

- What questions a contract manager or software asset manager must answer when adding a new software license certificate.

- How connection questions are used to select CIs from BMC Atrium CMDB. For more information about the BMC Atrium CMDB, see the *BMC Atrium CMDB Administrator's Guide*, the *BMC Atrium CMDB User's Guide*, and the *BMC Atrium CMDB CDM Common Data Model Diagram*.
- How compliance is computed based on compliance questions and actions specified during license type creation, such as relating CIs to a license certificate or creating exceptions.

You cannot modify license types after they have been used to create certificates.

TIP

For examples of how to configure your own license types, see Appendix B, "Create license type examples".

Default system license types

When the BMC Remedy Asset Management application is installed, the following default license types are already configured:

- Enterprise (company-based)
- Site
- Per instance
- Per copy per device
- Per copy
- BMC Remedy AR System fixed and floating

NOTE

All license types have to be enabled, including the license types shipped with the BMC Remedy Asset Management application. For more information, see "Enabling and disabling license types" on page 448.

If you want to use additional license types, follow the instructions in "Creating custom license types" on page 426 to create them.

Default behavior for customized license types

For any default or custom license type, the system uses default behavior when generating the rules for various license types. This default behavior is used whether or not you set up definitions in the license type wizard.

This default behavior for *connection* criteria uses a certificate's company and product categorization criteria to query certificates matching that license type and determine which CIs can be connected to a certificate. The default behavior is used in addition to any questions that are specified in the license type wizard for that license type.

This default behavior for *compliance* criteria queries certificates that match a license type and tests the result of the query against compliance criteria.

If you need more functionality in addition to the default behavior, you have to create a custom license type. You can configure additional connection behavior, or compliance actions, or both. The custom license type can be configured in either basic or advanced modes as described in “Basic and advanced mode.” If you want to use additional license types, follow the instructions in “Creating custom license types” on page 426 to create additional license types.

Table 15-1 explains how the default license types work.

Table 15-1: System license types

Contract type	Description
Enterprise	<p>An enterprise license type licenses all of the software from a manufacturer that is being used by a given company. There is one enterprise license per company. Anyone in the company can use the license. This license type is set to non-groupable.</p> <p>Connection</p> <p>Uses the default certificate criteria for connections. See “Default behavior for customized license types” on page 418.</p> <p>Compliance</p> <p>One computed compliance question is specified for number of licenses deployed. The certificate for this license type is always compliant.</p>
Site	<p>A site license type licenses all of the software from a manufacturer that is being used by a given site. A site license applies to a single site within a company. If a site license applies to multiple sites within a company, the contract manager or software asset manager can add a site license certificate for each site. This license type is set to non-groupable.</p>

Table 15-1: System license types (Continued)

Contract type	Description
Site (continued)	<p>Connection</p> <p>Uses the default certificate criteria for connections. See “Default behavior for customized license types” on page 418.</p> <p>In addition, one connection question exists for this license type, which is “Enter Certificate Site?”. When the license type is created, this question maps to the site of the computer system on which the product is installed.</p> <p>For each product that matches the default certificate criteria for connections, the site of the computer system on which the product is installed is used to connect the product to the license certificate to that site.</p> <p>For example, a contract manager creates a license certificate with the default certificate criteria for connections:</p> <ul style="list-style-type: none"> ■ Company = Calbro Services ■ Manufacturer = Microsoft ■ Product = Visio <p>The contract manager specifies this Site license certificate is for Frontoffice Support.</p> <p>A copy of Microsoft Visio is installed on a computer in Frontoffice Support. That product is not connected to the license certificate.</p> <p>A computer in Backoffice Support Services has both Microsoft Visio and Microsoft Word installed. Microsoft Visio is connected to the site license, but Microsoft Word is not (perhaps it is connected to an Enterprise license).</p> <p>Compliance</p> <p>One computed compliance question is specified for number of licenses deployed. The certificate for this license type is always compliant.</p>
Per instance	<p>Each instance of the license is counted as one license consumed. Any instance of software found requires a license. This license type is set to groupable.</p> <p>Connection</p> <p>Uses the default certificate criteria for connections. See “Default behavior for customized license types” on page 418.</p> <p>Compliance</p> <p>The following compliance question is asked:</p> <ul style="list-style-type: none"> ■ Number of licenses purchased? ■ Breach warning level 1? ■ Breach warning level 2? ■ Number of licenses deployed (computed question)

Table 15-1: System license types (Continued)

Contract type	Description
Per instance (continued)	<p>The answers to this question are used to:</p> <ul style="list-style-type: none"> ■ Determine the number of software instances related to the certificate ■ Set the certificate to not compliant, if the number of software instances related to a certificate is greater than the number purchased. <p>Example Two instances of BMC Atrium CMDB Enterprise Manager were found. In this situation, two licenses are required.</p>
Per copy per device	<p>The number of copies per device is counted as one license consumed. If the number of copies per device is exceeded, the license is out of compliance. The per device number specified for a license type determines how many copies can be installed on each device. This license type is set to groupable.</p> <p>Connection Uses the default certificate criteria for connections. See “Default behavior for customized license types” on page 418.</p> <p>Compliance The following compliance questions are asked:</p> <ul style="list-style-type: none"> ■ Number of licenses purchased? ■ Breach warning level 1? ■ Breach warning level 2? ■ Number of copies allowed per device? ■ Number of licenses deployed (computed question). <p>The answers to these questions are used to compute compliance:</p> <ul style="list-style-type: none"> ■ If any devices have more than the allowable number per device, the certificate is marked as not compliant. ■ Also, if the number of software licenses related to a certificate is greater than the number purchased, the certificate is marked as not compliant. <p>Example Two copies of Microsoft Word were found on a computer, but only one license exists. If the number of copies allowed on a device is one, this is not compliant.</p>
Per copy	<p>This license type is per copy per user. Each unique user (since, for example, there could be two software items linked to one user) is counted as one license consumed. If a user is not linked to a license, it is assumed that one license is consumed. This license type is set to groupable.</p> <p>Connection Uses the default certificate criteria for connections. See “Default behavior for customized license types” on page 418.</p>

Table 15-1: System license types (Continued)

Contract type	Description
Per copy (continued)	<p>Compliance</p> <p>Compliance is computed based on the number of unique individuals using a software product. The following compliance question will be asked:</p> <ul style="list-style-type: none"> ■ Number of licenses purchased? ■ Breach warning level 1? ■ Breach warning level 2? ■ Number of licenses deployed (computed question). <p>The answer to these questions are used to determine the number of unique individuals connected to a product. If the number counted is greater than the number of licenses purchased, the license certificate is set to not compliant.</p> <p>Example</p> <p>Two copies of an application were found on separate computers owned by one user and only one license exists. This situation is compliant, because only one license is required.</p>
BMC Remedy AR System fixed and floating	<p>The number of fixed and the number of floating licenses are compared against the number that is entitled. This is a demonstration of the advanced model. To walk through the creation of this license type as an example of the advanced model, see “BMC Remedy AR System fixed and floating license type example—advanced mode” on page 520.</p>

What is grouping?

If you have multiple certificates in different contracts, you can group these certificates under a master certificate. Only certificates belonging to the same product categorization should be grouped. For example, you might have a site license for Microsoft Visio for one location and 50 per instance licenses. Or, you might have two different site licenses. You can use the default license types for grouped certificates, or you can create a custom license type. For more information, see the *BMC Remedy Asset Management User's Guide*.

Basic and advanced mode

You use the following modes when creating custom license types:

- **Basic**—allows you to create connection questions and map these based on the answers entered for the questions when a license certificate is created. In addition to configuring connection information, you can also create compliance questions and actions to determine if you license certificates and CIs are compliant with your licensing agreements, for example, to determine whether or not you have deployed more licenses than you have purchased.

For more information about creating a license type in basic mode, see “Basic mode” on page 427.

-
- **Advanced**—uses template forms and allows you to add your own fields. Then the fields are mapped using the license type wizard. This mode allows more flexibility when creating a custom license type.

For more information about creating a license type in advanced mode, see “Advanced mode” on page 444.

What are connection questions?

Connection questions (in basic mode) and customized connection forms (advanced mode) and mappings define the criteria by which CIs are connected to certificates. A default set of connection behavior is used regardless of whether connection questions or forms are configured for a license type. See “Default behavior for customized license types” on page 418. If the default behavior is sufficient, connection questions, or forms, do not have to be configured for a custom license type.

To determine which CIs should be connected to a license certificate, the license engine uses the answers supplied to connection questions or supplied in connection forms at the time a license certificate is created. For more information about creating license certificates, see the *BMC Remedy Asset Management User’s Guide*.

What are compliance questions and actions?

Compliance questions and actions work on the retrieved connection information to determine if licenses are compliant with their license contract. You use the license type wizard to configure compliance questions (for basic mode) or a compliance form (for advanced mode).

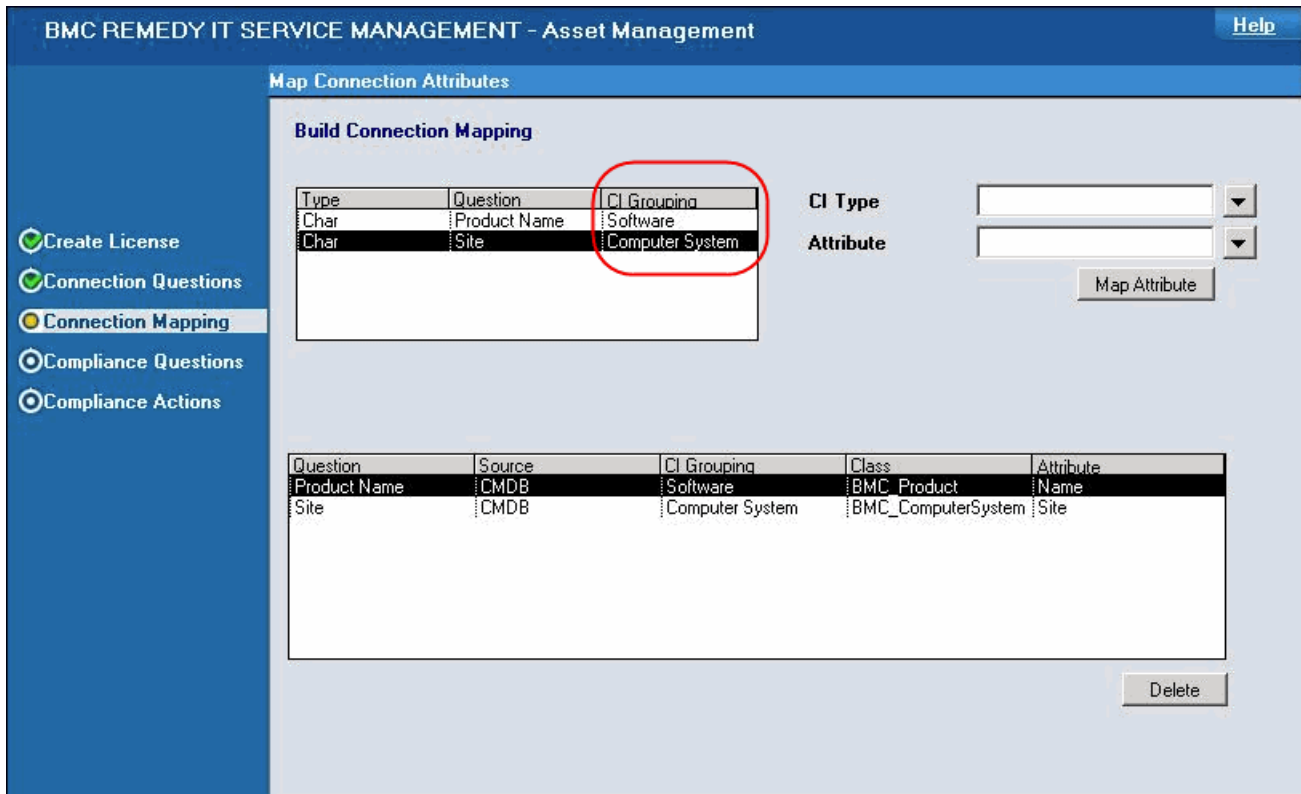
You also configure actions that test the compliance of CIs connected to licenses based on values entered at the time the license certificate is created. For example, you can determine if there are more deployed licenses than were purchased for a particular site.

What is a complex query?

CIs are grouped in a hierarchy where one main class contains sub-classes, which are referred to as the CI grouping. The CI Grouping field on the Connection Questions page of the license type wizard contains both the main class (which populates the CI Type field on the Map Connection Questions page of the license type wizard) as well as the sub-classes (which populate the Attribute field on the Map Connection Questions page of the license type wizard). You are creating a complex query if you build connection questions from a main class and a sub-class or two separate sub-classes. For more information about creating a complex query in the license type wizard, see step 4 and step 5 on page 430. For more information about the CMDB models on which license type are based, see *Using the CDM and Extensions to Model Business Entities White Paper*.

Figure 15-9 shows a complex query being configured in the Map Connection Attributes page of the license type wizard.

Figure 15-9: Map Connection Attributes page showing complex query being created



Running the license engine

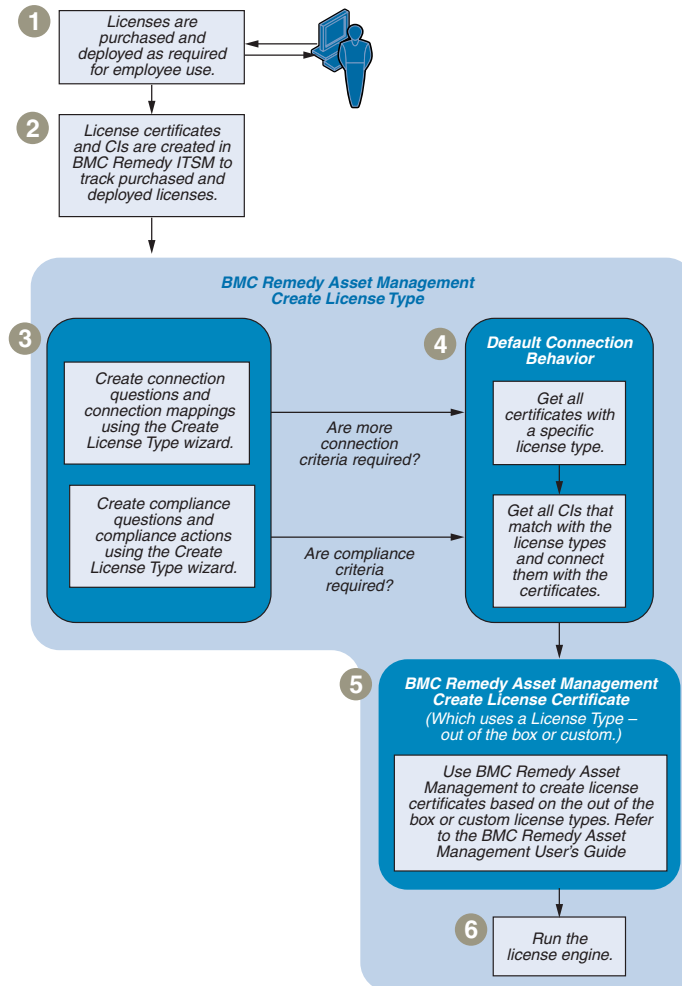
After license certificates are set up with the appropriate license types, you can run the license engine to connect CIs and compute compliance. You can schedule the license engine to run immediately, at a scheduled time, or after reconciliation. Licensing jobs are run from the Manage License Jobs Console. For more information about the Manage License Jobs Console, see the *BMC Remedy Asset Management User's Guide*.

Certain parameters that control how the license engine runs can also be configured. For more information about configuring the license engine, see “Configure License Engine Run” on page 458 and “License Engine Configuration” on page 455.

Overview of the create license type process

Figure 15-10 shows the process that you follow to create a license type.

Figure 15-10: Create license type process flow



Creating custom license types

NOTE

When you create a license type, it is created in draft mode. You need to enable it before you can use it. For more information about enabling license types, see “Enabling and disabling license types” on page 448.

► **To configure a new license type**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Configure License Type, and then click Open.

The Configure Licenses form lists the current license types.

- 3 Click Create.

The Create License Type page of the license type wizard is displayed as shown in Figure 15-11.

Figure 15-11: License type wizard (page 1) - Create License Type

BMC REMEDY IT SERVICE MANAGEMENT - Asset Management [Help](#)

Create License Type

License Type Information

Company Calbro Services

License Type Visio Compliant [Manage Locales](#)

Description

Status Draft

Groupable No

License Type Mode Basic

[Close](#) [<< Previous](#) [Next >>](#)

- 4 Specify the following fields, and then click Next.

TIP

You can click Manage Locales to enter license type and description in different languages.

Field	Description
Company	Select the company that can use this license type. If this license type can be used by all companies, select -Global-.
License Type	Enter the name of the license type.
Status	The status has a default value of Draft. This value cannot be changed. After the license type has been created, it needs to be activated as described in “Enabling and disabling license types” on page 448.
Description	Optional. A description of the license type being created.
Groupable	Specify whether certificates of this type are to be grouped under a master certificate based on license type and product categorization. Note: If you select Yes here, you later use the summable and distributable options for compliance questions. For more information about using the summable and distributable options available, see step c on page 432.
License Type Mode	Select Basic or Advanced. The basic mode uses a wizard to guide you through creating the license type. <ul style="list-style-type: none">■ Basic—Continue with the steps described in “Basic mode” on page 427.■ Advanced—Continue with the steps described in “Advanced mode” on page 444.

Basic mode

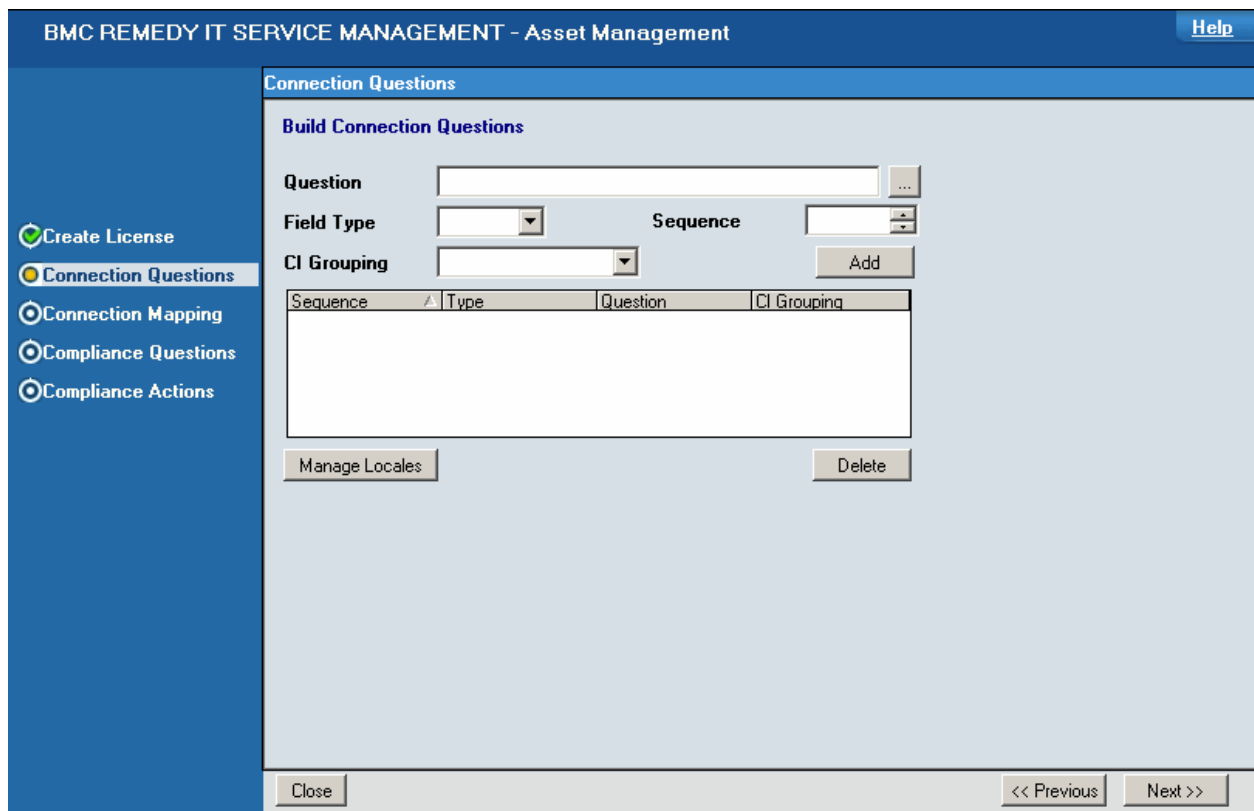
This section continues with the rest of the steps required to create a license type in basic mode. For an example of how to create a license type in basic mode, see “Site license type example—basic mode” on page 498 and “Per instance license type example—basic mode” on page 508.

► To continue creating a license type using basic mode

- 1 You should already have completed the steps in “Creating custom license types” on page 426.
- 2 In the License Type Mode, Basic should be selected. If it is not, select it now.
- 3 Click Next.

The answers to the connection questions are used to return a list of CIs that match certain criteria and the Connection Questions page of the license type wizard for basic mode is displayed as shown in Figure 15-12.

Figure 15-12: License type wizard (page 2) - Connection Questions



- 4 Specify the connection questions.

For each connection question, perform the following steps:

 - a Type a question in the Question field.

The question name is the question that is displayed to the user who adds a license certificate. In the next stage of the license wizard, you map this question to an attribute in the BMC Atrium CMDB. The user’s answer to the question is used by the license engine in a query to BMC Atrium CMDB.
 - b Select a field type of either Char or Int.

The field type determines whether the user enters a character or integer answer to the question.
 - c Select the CI grouping:
 - **Software**—The question is about the software being licensed.
 - **Component**—The question is about a component on the computer system on which the software is installed.

-
- **Computer System**—The question is about the computer on which the software is installed.

Selecting the CI grouping for the question, also determines the CI type attribute you can select to map to it. For example, if the CI grouping question is set as Software, then you can only map attributes belonging to the software classes. The CI Type menu is dynamically populated when you select the question to be mapped.

- d Select the sequence in which the question is asked.
- e Click Add.

TIP

To delete a question, highlight it in the list and click Delete. If you want to modify a question, you must delete it and add a new question.

- f To enter questions in other languages, select a question and click Manage Locales.

The Manage Locales form displays the selected question. You can add translations of the question for other locales.

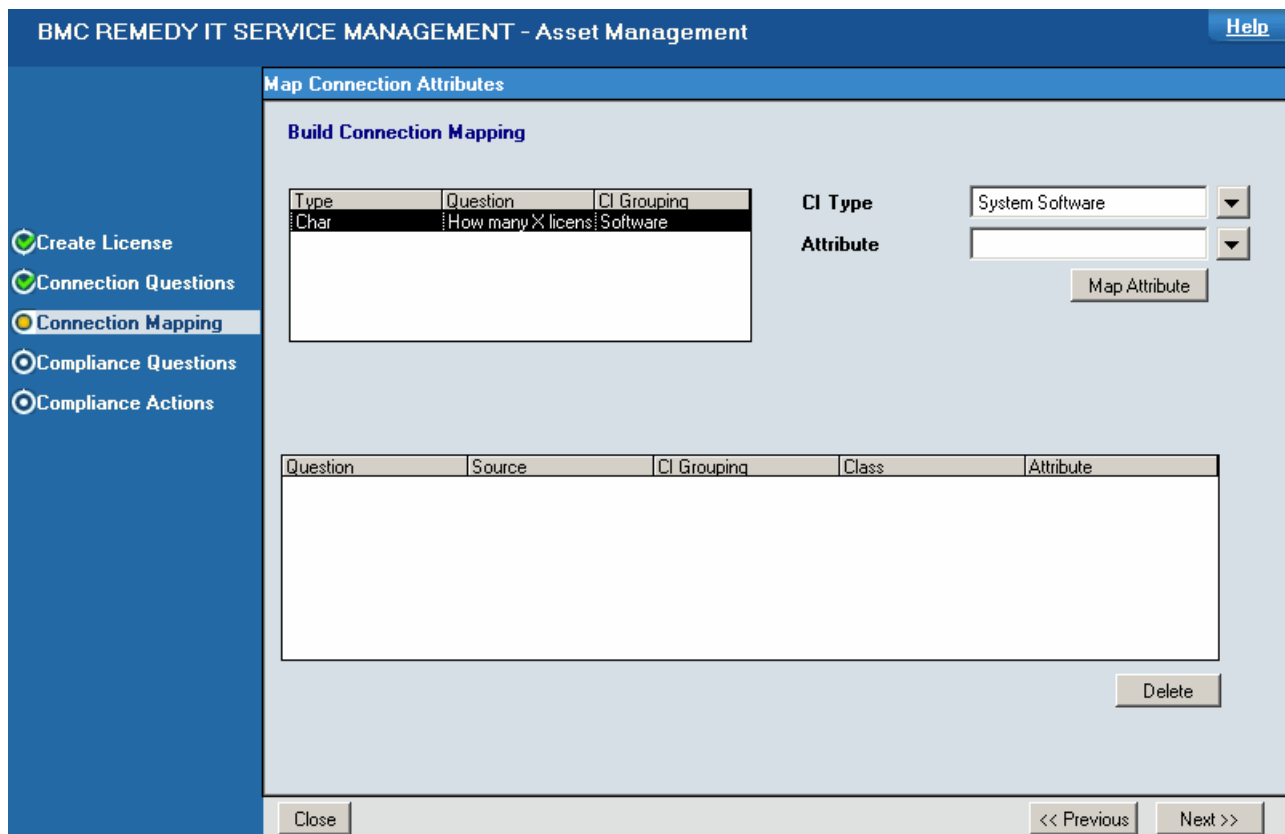
- g When you have finished adding questions, click Next.

The Map Connection Attributes page of the license type wizard for basic mode is displayed as shown in Figure 15-13.

TIP

The Map Connection Attributes page is displayed only if you define connection questions.

Figure 15-13: License type wizard (page 3) - Map Connection Attributes



- 5 Specify how to map the questions to CIs in BMC Atrium CMDB.

For each connection question, select the CI Type and Attribute and click Map Attribute. You must use the same CI Type for each connection question. The query to connect to the appropriate CI uses a logical AND between attributes.

NOTE

For any CI Type that you select, the Attribute field lists the DB names used in BMC Atrium CMDB forms.

TIP

To delete a mapped attribute, select it from the list at the bottom of the Build Connection list and click Delete.

6 Click Next.

The compliance questions are used by the compliance actions to determine the compliance for the given license type. The CIs connected to a certificate and the number of CIs that are allowed to be connected are analyzed through these actions.

The Compliance Questions page of the license type wizard for basic mode is displayed as shown in Figure 15-14.

Figure 15-14: License type wizard (page 4) - Compliance Questions

BMC REMEDY IT SERVICE MANAGEMENT - Asset Management Help

Compliance Questions

Build Compliance Questions

Question: ...

Field Type: Integer Field Type:

Sequence:

Computed Value:

Field Visibility:

Sequence / Type	Question	Computed F	Visibility	Field Type	Compliance
-----------------	----------	------------	------------	------------	------------

7 Specify the compliance questions as follows:

- a Type a question in the Question field.

The question name is the question that is displayed to the person who adds a license certificate. In the next stage of the license type wizard, you build compliance actions to get, calculate, compare, or update values based on answers entered when a license certificate is created using this license type. The answers to the questions are used by the license engine in a query to BMC Atrium CMDB.

- b Select a field type of either Char or Int.

The field type determines whether the user enters a character or integer answer to the question.

- c If you specified Groupable on the Create License Type page of the license type wizard and Int as the field type here, select one of these values in the Integer Question Type field:
- **None**—indicates that the field is to accept an integer value that is operated on according to actions specified in the Build Compliance Actions page of the license type wizard.
 - **Summable**—indicates that the field that you specify as summable gets rolled up from all the children to the master certificate.
 - **Distributable**—Uses the summable amount and distributes the number to the children based on the sequence of the children and the value for each.

For example, on three separate occasions, 10 licenses, 5 licenses, and 20 licenses were purchased. When their certificates are grouped at the master level, 35 are displayed for summable. The distributable value that is displayed shows the value for each certificate. If a total of 45 CIs are found connected to the certificate, 10 are assigned to the first child certificate, 5 to the second, and the remaining 30 for the last. (Amounts are distributed back to the child certificates based on the sequence in which they were grouped under the master certificate.) Since the last certificate gets assigned 30 while it had only purchased 20, it is marked as not compliant. The master certificate is also marked as not compliant.

- d If you selected Distributable in step c above, these two additional fields appear as shown in Figure 15-15:
 - **Summable Field List**—Select the summable field based on which the distributable field should divide the totals amongst the children certificates.
 - **Set Compliance Alarm**—Select whether or not you want to set a compliance alarm. If set to Yes, this distributable field is used to trigger compliance on the children certificates.

Figure 15-15: Summable Field List and Set Compliance Alarm fields

- e Specify whether the question uses a computed value.
You can specify rules on the next page of the license type wizard to compute values.

- f Select the field visibility:
 - **Visible Read / Write**—identifies fields that are updatable from the certificate.
 - **Visible Read Only** —categorizes fields that do not need to be updated from the certificate, such as those retrieved for a compare or computation. For example, this attribute can be used for the results of CMDB queries.

Selecting this value results in a dimmed, uneditable field when you use this license type to create a license certificate from the Software Asset Management (SAM) Console.
 - **Hidden**—Used to categorize fields that are used in an operation but do not need to be seen in the certificate.
- g Select the sequence in which the question is asked.
- h To enter questions in other languages, select a question and click Manage Locales.

The Manage Locales form displays the selected question. You can add translations of the question for other locales.
- i Click Add.

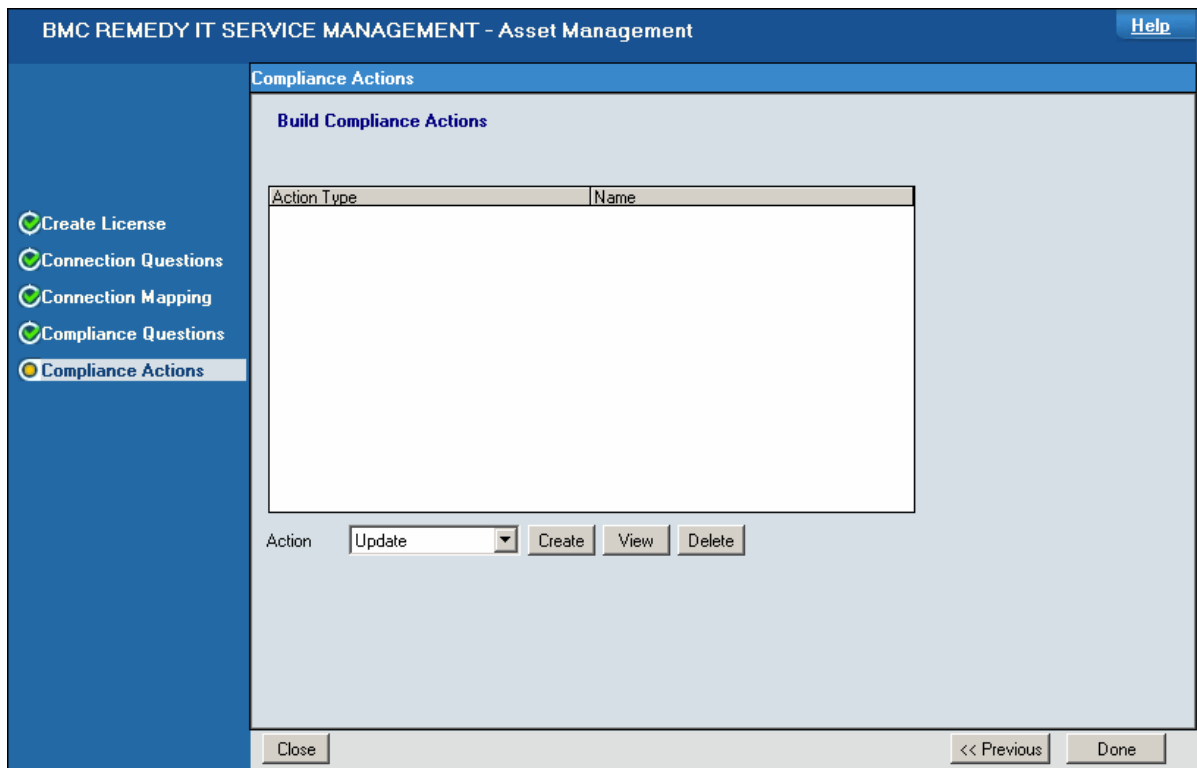
TIP

To delete compliance questions, select them from the list at the bottom and click Delete.

- j When you have finished adding all of the compliance questions, click Next.

The Compliance Actions page of the license type wizard for basic mode is displayed as shown in Figure 15-16.

Figure 15-16: License type wizard (page 5) - Compliance Actions



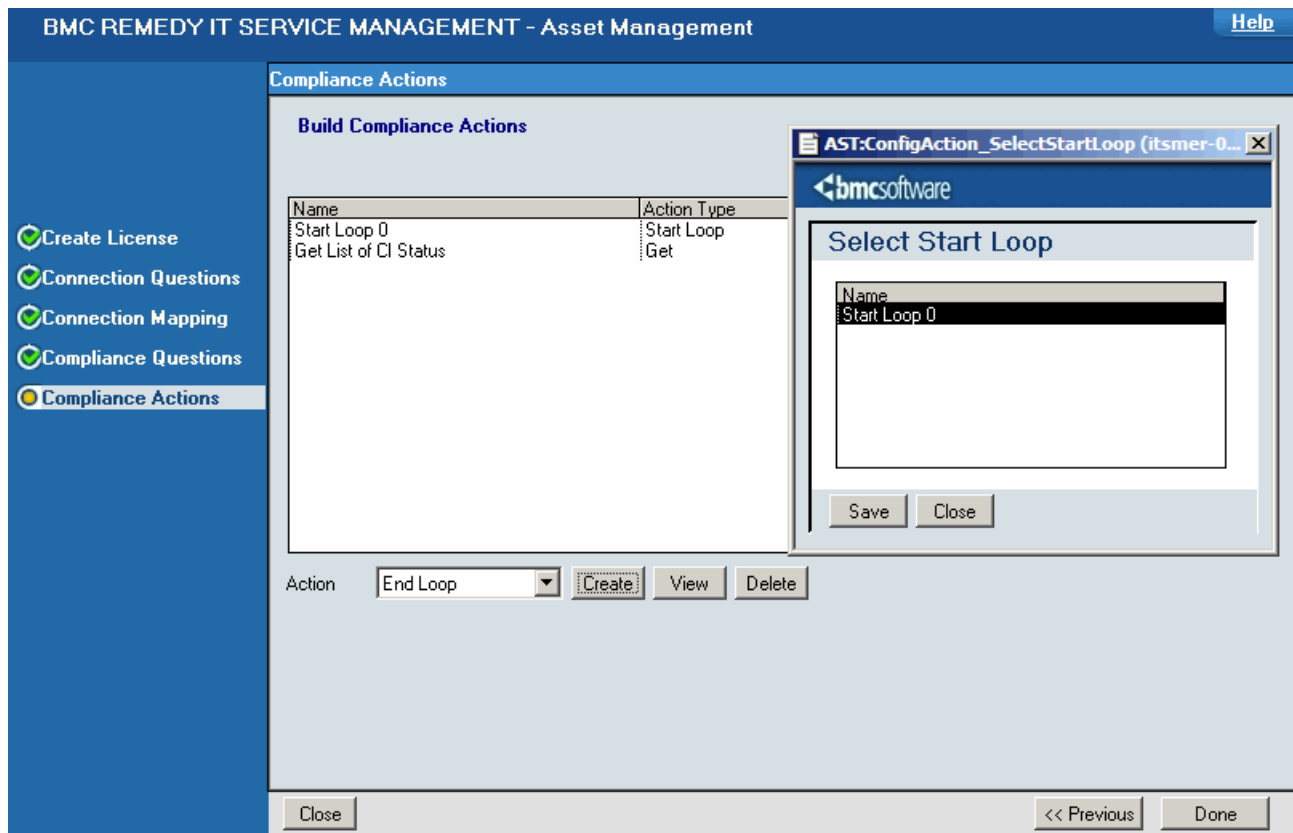
8 Specify compliance actions.

Based on the run-time data from the license engine and based on the compliance questions, select and create the following compliance actions:

- **Get** retrieves a list of values or a count of the matching records from the specified form. For more information, see “Get Compliance Action” on page 436.
- **Calculate** computes an expression. For more information, see “Calculate Compliance Action” on page 439.
- **Compare** performs a comparison defined in an expression. For more information, see “Compare Compliance Action” on page 440.
- **Update** updates a list of values on a specified form. For more information, see “Update Compliance Action” on page 441.
- **Start loop**—Lets you process a set of actions before moving on to the next. The Start Loop action is used to start a loop to return a list of values from a Get Action. A Start Loop Action must be created before the Get Action is created. Actions that use the Get action’s results list are created after the Get.

- **End loop**—Ends the loop before moving to the actions outside the loop. When you select End Loop, a pop up appears prompting you to select the Start Loop action for which the End Loop is to be created. Figure 15-17 shows an End Loop action being created.

Figure 15-17: End Loop being created for a Get action list



- 9 When you have finished specifying compliance actions, click Done.

Get Compliance Action

Use this action to retrieve information from BMC Remedy AR System or BMC Atrium CMDB forms.

► To create a Get compliance action

NOTE

This procedure continues from step 8 on page 435 and step 10 on page 447.

- 1 On the Compliance Actions page of the license type wizard, select Get in the Action field and click Create.

The Get Action dialog box is displayed as shown in Figure 15-18.

Figure 15-18: Get Action dialog box

The screenshot shows the 'Get Action' dialog box. The title bar includes the BMC logo and the text 'Get Action'. The main area contains the following fields and controls:

- Name:** A text box containing 'Get AR System License Types' and a small '...' button to its right.
- Source:** A dropdown menu currently showing 'AR'.
- From:** A dropdown menu currently showing 'AR System Licenses'.
- Type:** Two radio buttons, 'List' (which is selected) and 'Count'.
- Select:** A dropdown menu showing 'License Type', with 'Add' and 'Remove' buttons to its right.
- SELECT:** A large, empty text area for defining the query.
- Rule:** A section with three dropdown menus labeled 'Rule', 'Operator', and 'Field', followed by a 'Value' text box and 'Add Value' and 'Clear' buttons.
- WHERE:** A text box for defining the WHERE clause, with a small '...' button to its right.
- Buttons:** 'Save' and 'Close' buttons at the bottom of the dialog.

- 2 Enter a name for the Get compliance action.
- 3 Select a source:
 - **CMDB** is used to get information from BMC Atrium CMDB forms based on the values of class attributes.
 - **AR** is used to get data from any BMC Remedy AR System form.
- 4 If the source is CMDB, a list of classes shown in the CI Type field and an attribute. (Classes are shown here instead of form names.) If you selected AR, select the form name from the From field.
- 5 Select the Get action type for which you want to create a query:
 - **List** returns a list of records that match the criteria specified in the Get action that you are building.
 - **Count** sums the number of records that match the criteria specified in the Get action that you are building.
- 6 In the Select field, select from the list of fields displayed for the form or class you selected, and click Add. If you selected Count in the previous step, this field is unavailable.

- 7 Build the WHERE qualification using the controls in the toolbar above the WHERE field.

As you build the WHERE qualification, it is displayed in the WHERE field shown in Figure 15-19.

Figure 15-19: WHERE qualifier toolbar



TIP

As you build the WHERE qualification, you can delete it to make corrections at any time by clicking Clear.

You can use all or some of the following fields to build your WHERE qualification.

- a Select the rule:
 - **GetCertificates** specifies the instance ID of the certificate as a value in the WHERE qualification.
 - **GetQuestions** specifies the compliance question that you select as a value in the WHERE qualification.
 - GetCertificates and GetQuestions are the default rules that appear. As you create actions, they also appear for you to select.

NOTE

Some of the data that is created through connection rules can also be selected here. For example, you can query relationship tables that were populated during a previous connection run.

- b Select the operator.
 - c Select a field to enter as a value in the WHERE qualification.
 - d To specify a free-form value, enter it in the Value field and click Add Value.
- 8 Click Save and then click Close.
 - 9 After you have finished adding all of the compliance actions that you require, click Done to complete the license type wizard.

Calculate Compliance Action

Use the calculate compliance action to compute a value from data retrieved from previous actions. This computation can then be used to update other fields or storage values.

► **To create a Calculate compliance action**

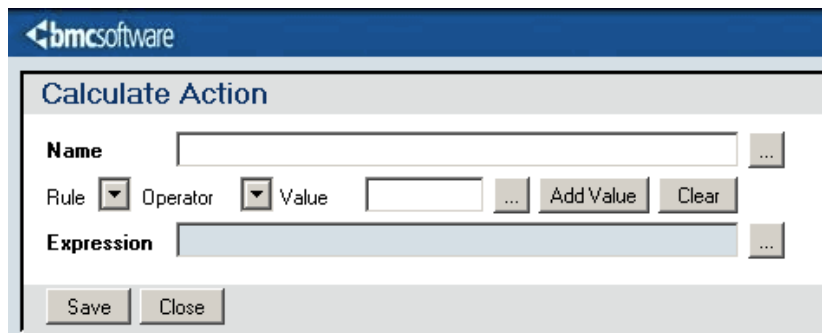
NOTE

This procedure continues from step 8 on page 435 and step 10 on page 447.

- 1 On the Compliance Actions page of the license type wizard, select Calculate in the Action field and click Create.

The Calculate Action dialog box is displayed as shown in Figure 15-20.

Figure 15-20: Calculate Action dialog box



- 2 Type a name for the calculate compliance action in the Name field.
- 3 Build the expression using the controls in the toolbar above the Expression field. As you build the expression, it is displayed in the Expression field shown in Figure 15-21.

Figure 15-21: Expression toolbar



TIP

As you build the expression, you can delete it to make corrections at any time by clicking Clear.

You can use the following fields to build your expression.

- a Select the rule:
 - **GetCertificates** specifies the instance ID of the certificate as a value in the expression.
 - **GetQuestions** specifies the compliance question you select as a value in the expression.
 - GetCertificates and GetQuestions are the default rules that appear. As you create actions, they also appear for you to select.

NOTE

Some of the data created due to connection rules can also be selected here. For example, you can query relationship tables that were populated during a previous connection run.

- b Select the operator.
- c Specify a free-form value in the Value field and click Add Value.
- 4 Click Save and then click Close.
- 5 After you have finished adding all of the compliance actions you require, click Done to complete the license type wizard.

Compare Compliance Action

Use the compare compliance action to compare two or more values and take action based on that comparison.

► To create a Compare compliance action

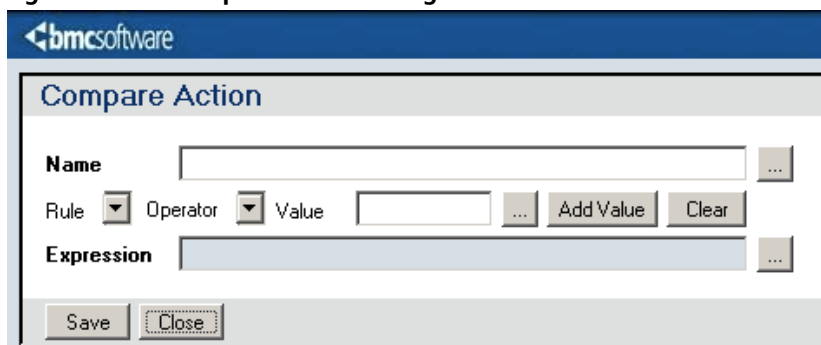
NOTE

This procedure continues from step 8 on page 435 and step 10 on page 447.

- 1 On the Compliance Actions page of the license type wizard, select Compare in the Action field and click Create.

The Compare Action dialog box is displayed as shown in Figure 15-22.

Figure 15-22: Compare Action dialog box



- 2 Type a name for the action in the Name field.
- 3 Build the expression using the controls in the toolbar above the Expression field. As you build the expression, it is displayed in the Expression field.

TIP

As you build the expression, you can delete it to make corrections at any time by clicking Clear.

You can use the following rules to build your expression.

- a Select the rule:

-
- **GetCertificates** specifies the instance ID of the certificate as a value in the expression.
 - **GetQuestions** specifies the compliance question you select as a value in the expression.
 - GetCertificates and GetQuestions are the default rules that appear. As you create actions, they also appear for you to select.

NOTE

Some of the data created due to connection rules can also be selected here. For example, you can query relationship tables that were populated during a previous connection run.

- b Select the operator.
- c Specify a free-form value in the Value field and click Add Value.
- 4 Click Save and then click Close.
- 5 After you have finished adding all of the compliance actions you require, click Done to complete the license type wizard.

Update Compliance Action

Use the update compliance action to update fields on BMC Remedy AR System compliance forms or update compliance questions that are set to computed.

► To create an Update compliance action

NOTE

This procedure continues from step 8 on page 435 and step 10 on page 447.

- 1 On the Compliance Actions page of the license type wizard, select Update in the Action field and click Create.

The Update Action dialog box is displayed as shown in Figure 15-23.

Figure 15-23: Update Action dialog box showing Set field listing fields in selected form

- 2 Type a name for the action in the Name field.
- 3 Select a source:
 - **AR** allows an AR form to be selected and fields on that form to be updated.
 - **Compliance Question** allows configured compliance questions to be selected. Only those that are set to computed are available for selection. In addition to these questions, three compliance flags can also be set:
 - **Compliance flag** is set to true (value equal to 1) or false (value equal to 0) to indicate if certificates are in or out of compliance.
 - Breach levels can be set by an update rule to indicate that a certificate is approaching or about to be in breach compliance. Two breach flags are available for selection: **Breach level 1** and **Breach level 2**. As an example, you would set Breach level 1 to warn you when the number of licenses you have was reduced to 10; you would set Breach level 2 to warn you when the number of licenses you have was reduced to 2. Breach level 3 is not available for selection because it is set automatically by workflow when the license certificate goes out of compliance.
- 4 In the Target field, select a form name that contains the fields that will be updated. AST:Compliance_BasicQuestions is the compliance form for the Basic model and AST:Compliance_AdvancedQuestions is the compliance form for the Advanced model.

-
- 5 In the Set field, select the field to be updated.
 - 6 In the Set Value From field, select the method to use for the update:
 - **Rule** uses the rule (WHERE qualifier) that you build in the WHERE field. If you select Rule, continue with step 7.
 - **Constant** uses the value you specify in the Value field (just below the Set Value From field). If you select Constant, skip to step 8.
 - 7 If you selected Rule in step 6, build the WHERE qualifier using the controls in the toolbar above the WHERE field. As you build the clause, it is displayed in the WHERE field.

NOTE

If you selected Compliance Question for Source, the following default WHERE qualifier is created. You can modify this WHERE qualifier as required.

```
"GetCertificates.InstanceId" = 'Certificate_InstanceID'
```

TIP

As you build the WHERE qualifier, you can delete it to make corrections at any time by clicking Clear.

You can use the following rules to build your expression.

- a Select the rule:
 - **GetCertificates** specifies the instance ID of the certificate as a value in the WHERE qualifier.
 - **GetQuestions** specifies the compliance question you select as a value in the WHERE qualifier.
 - GetCertificates and GetQuestions are the default rules that appear. As you create actions, they also appear for you to select.

NOTE

Some of the data created due to connection rules can also be selected here. For example, you can query relationship tables that were populated during a previous connection run.

- b Select the operator.
 - c Select a field to enter as a value in the WHERE qualifier.
 - d To specify a free-form value, enter it in the Value field and click Add Value.
- 8 If you selected Constant in step 6, enter the value in the Value field below the Constant option and click Add.

TIP

You can delete values that you have entered by selecting them from the list and clicking Remove.

- 9 Select a matching requests value:
 - **Do not update, issue an error**—Issue an error when the first matching record is encountered and abort the run.
 - **Do not update, issue a warning**—Issue a warning for each matching record and continue until all records have been processed and the run is completed.
 - **Modify all matching records**—Update all records that match.
- 10 Click Save and then click Close.
- 11 After you have finished adding all of the compliance actions you require, click Done to complete the license type wizard.

Advanced mode

This section provides instructions for the following tasks:

- Customizing the connection and compliance template forms so that they can then be mapped using the license type wizard. To customize these template forms, follow the steps in “To customize your connection and compliance forms” on page 444.
- Completing the license type wizard after you select Advanced in the License Type Mode field of the License Type Information page. To complete the rest of the steps in the license type wizard after selected Advanced mode, follow the steps in “To continue creating a license type using advanced mode” on page 445.

► To customize your connection and compliance forms

- 1 Open the AST:ConnectionTemplate form in Developer Studio.
The form appears with default field types and labels.
- 2 Save the template form under a new name. You will enter this name in a field in the license type wizard.
- 3 Change the labels and field characteristics so that they can be understood by the individual who will be creating the license certificate that uses this customized form. This form will appear for the user to enter data in when creating a license certificate.

NOTE

The ID for each field has to be a unique value within the range 303000500 – 303000900.

TIP

You can optionally add workflows or filters to make it easier to enter data, to validate data, or both.

- 4 Save the form.
- 5 Open the AST:ComplianceTemplate form in BMC Remedy Developer Studio and complete step 1 through step 4 for it.

► **To continue creating a license type using advanced mode**

- 1 If you have not already done so, complete step 1 through step 4 in “To configure a new license type” on page 426. In step 4, select Advanced.

Two additional fields are displayed as shown in Figure 15-24, which are *not* displayed for Basic mode:

- Connection Form Name
- Compliance Form Name

Figure 15-24: License type wizard - Create License Type (advanced mode)

- 2 In the Connection Form Name field, enter the name of the connection form that you customized from the AST:ConnectionTemplate form to create this license type. See the steps in “To customize your connection and compliance forms” on page 444 for more information about customizing this form.

IMPORTANT

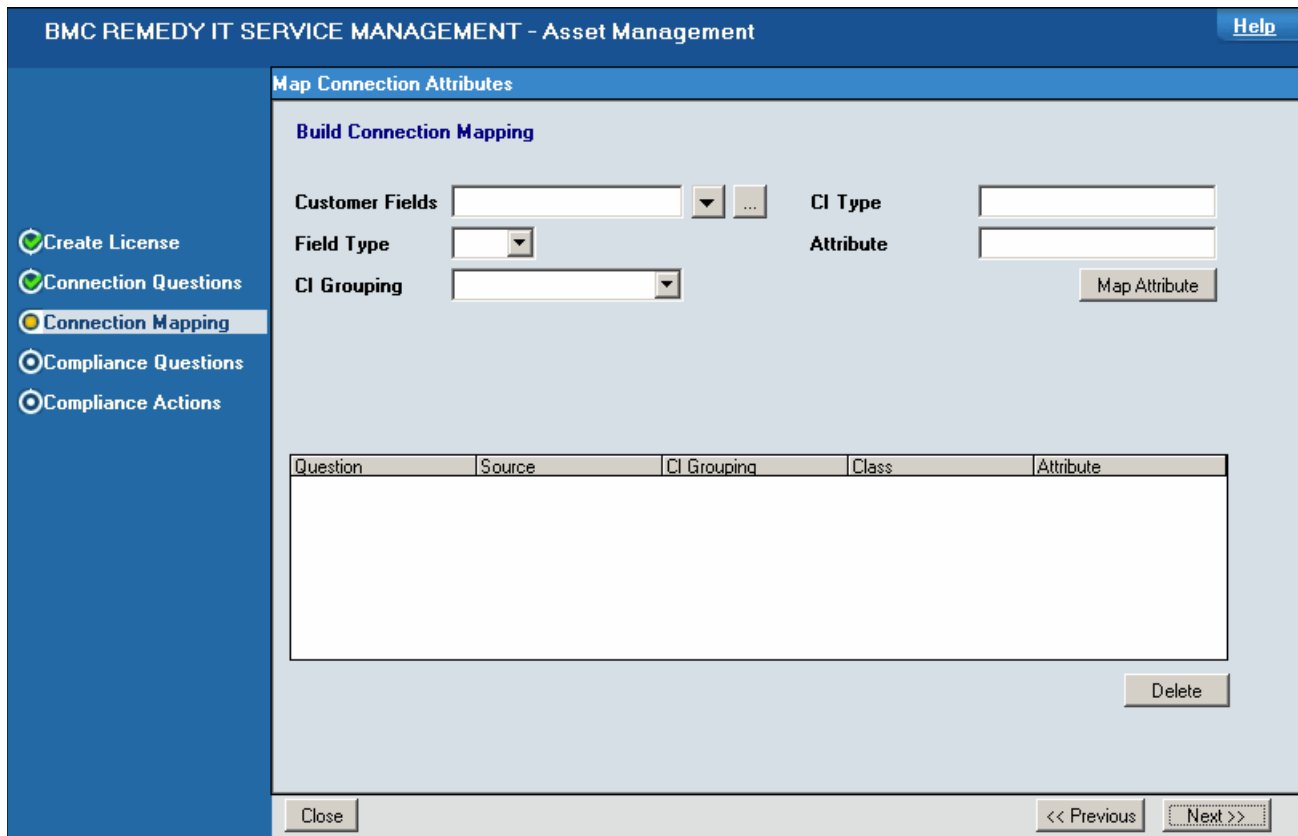
You must spell your form names correctly when you enter them. Otherwise, the license type wizard will not be able to retrieve the fields for selection.

- 3 In the Compliance Form Name field, enter the name of the compliance form that you customized from the AST:ComplianceTemplate form to create this license type. See the steps in “To customize your connection and compliance forms” on page 444 for more information about customizing this form.

4 Click Next.

The Map Connection Attributes page of the license type wizard for advanced mode appears as shown in Figure 15-25.

Figure 15-25: License type wizard - Map Connection Attributes (advanced mode)



5 From the Customer Fields list, select a field from the connection form that you customized.

6 Select a field type of either Char or Int.

The field type determines whether the user enters a character or integer answer to the question.

7 Select the CI grouping for the license type.

When you select a CI grouping, the certificates created with this type are grouped under a master certificate, based on license type and the product categorization you select in the CI Grouping field.

8 Specify how to map the questions to CIs in BMC Atrium CMDB.

For each connection question, select the CI Type and Attribute and click Map Attribute.

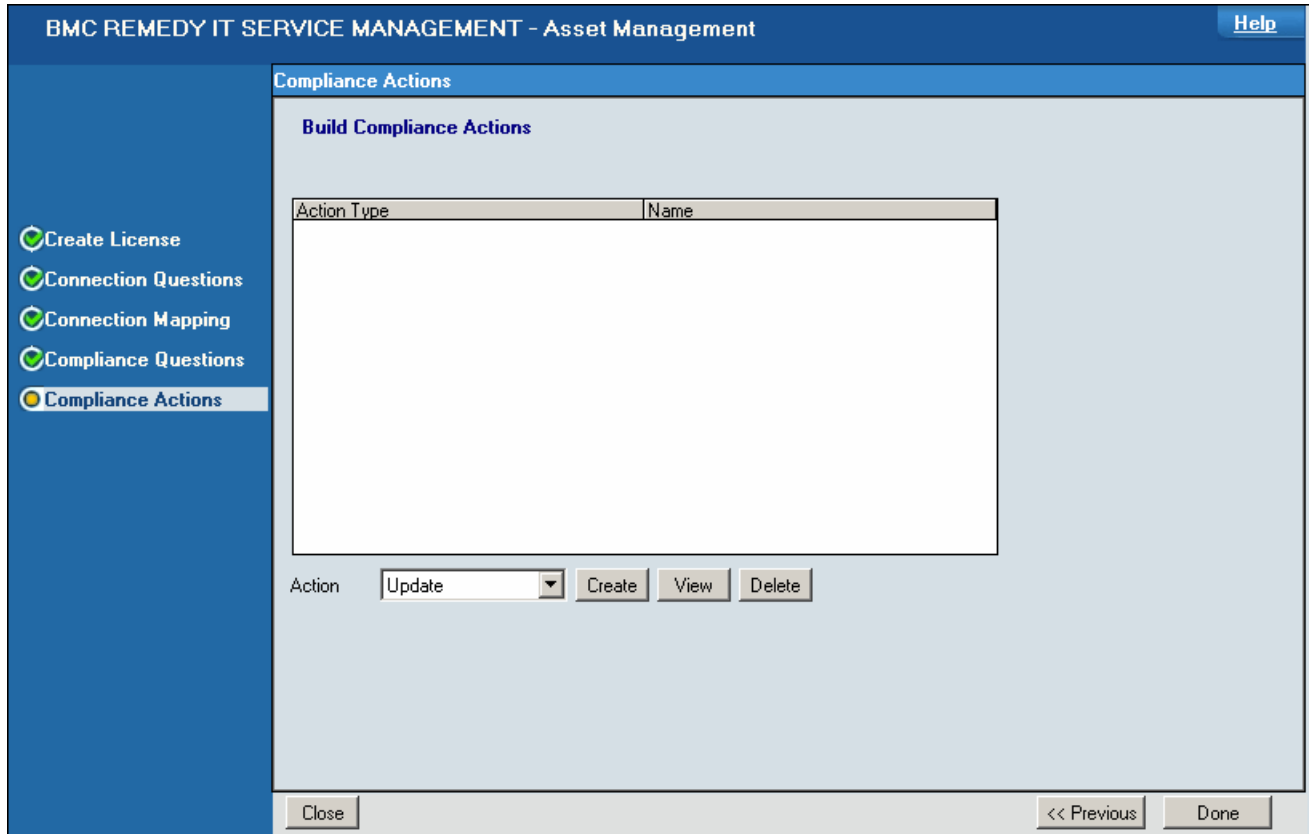
TIP

To delete a mapped attribute, select it from the list at the bottom of the Build Connection Mapping list and click Remove.

9 Click Next.

The Compliance Actions page of the license type wizard in advanced mode appears as shown in Figure 15-26.

Figure 15-26: License type wizard - Compliance Actions (advanced mode)



10 Specify compliance actions.

Based on the run-time data from the rules engine and based on the compliance questions, select and create the following compliance actions:

- **Get** retrieves a list of values or a count of the matching records from the specified form. For more information, see “Get Compliance Action” on page 436.
- **Calculate** computes an expression. For more information, see “Calculate Compliance Action” on page 439.
- **Compare** does a comparison based on an expression. For more information, see “Compare Compliance Action” on page 440.
- **Update** modifies a list of values on a specified form. For more information, see “Update Compliance Action” on page 441.
- **Start loop** processes a set of actions before moving on to the next. The Start Loop action is used to start a loop to return a list of values from a Get Action. A Start Loop Action must be created before the Get Action is created. Actions that use the Get action’s results list are created after the Get.

- **End loop** ends the loop before moving to the actions outside the loop. When you select End Loop, a pop up appears prompting you to select the Start Loop action for which the End Loop is to be created. Figure 15-17 shows an End Loop action being created.
- 11 When you have finished specifying compliance actions, click Done.

Enabling and disabling license types

When you create a license type as described in “Configure License Type” on page 417, it is created in draft mode. To use the license type, you must enable it.

NOTE

All license types have to enabled, including the license types shipped with the BMC Remedy Asset Management application. For more information about the license types shipped with the BMC Remedy Asset Management application, see “Default system license types” on page 418.

► To enable a license type

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Configure License Type, and then click Open.
The Configure Licenses form lists the current license types.
- 3 From the list, select the license type that you want to enable and click Enable.

TIP

To prevent certain license types from being used, you can disable them by selecting them from the list and clicking Disable.

TIP

You can continue learning more about the different types of questions you can ask and the mappings and actions you can use by looking at the default license types shipped with the BMC Remedy Asset Management application. Select one of the default license types from the Configure License Type dialog box that appears when you double-click Configure License Type on the Custom Configuration tab of the Application Administration Console, and click View. For more information about the default license types, see “Default system license types” on page 418.

Troubleshooting license types

This section describes how to troubleshoot license types and the various rules and operations that they use.

When you use the license type wizard to create a license type, a set of rules is generated in the License Engine forms and stored as metadata. These forms start with a prefix of RLE. When the license engine runs, it executes these rules.

If your license job is not running properly, some of the reasons might be:

- The rules might not have been set up as required.
- The right qualifications might not have been defined.
- The fields might not have been mapped correctly.
- The right scope for the job might not be defined.

Make sure to test your new customized license type before you put it into production.

If everything has been set up correctly and the right scope has been defined for the license job, you should follow the debugging suggestions in “Logging” on page 450 and “Debugging tips” on page 450.

NOTE

Before trying to debug licenses, familiarize yourself with the rules engine described in the *BMC Remedy IT Service Management (ITSM) Architecture White Paper*.

IMPORTANT

Before you begin debugging, export the license type forms as a backup. For a list of the forms you need to export and the method to follow, see the next section, “Backing up the license type forms”.

Backing up the license type forms

To ensure there is no loss of data that prevents you from using your existing license types, before you begin troubleshooting, export the license type forms listed in Table 15-2 using BMC Remedy Developer Studio. Then you can import them at a later time if you need to recover them.

Table 15-2: List of license type forms

Form name
AST:ConfigAction_CalculateSpecificData
AST:ConfigAction_GetSpecificData
AST:Config_ActionBase
AST:ConfigCompliance_RuleReference
AST:ConfigConnection_RuleFieldMapping
AST:ConfigCompliance_RuleDefinition
AST:ConfigBasicQuestionRegistry_DispProp
AST:ConfigBasicQuestionRegistry_Base
AST:ConfigLicenseTypeRegistry_DispProp
RLE:ComplexRuleSpecificData
RLE:CalculationRuleSpecificData
RLE:GetRuleSpecificData
RLE:LoopRuleSpecificData
AST:ConfigLicenseTypeRegistry_Base

Table 15-2: List of license type forms (Continued)

Form name
AST:ConfigCompliance_ActionSelectList
AST:ConfigAction_UpdateSpecificData
AST:ConfigRuleSet
RLE:RuleSet
RLE:RuleSetType
RLE:BaseRule
RLE:UpdateRuleSpecificData

Logging

To help debug problems, you can turn logging on at the engine level. To log all of the rules as they execute, you can set the log level to debug. Then you can examine the rules to determine whether they are being translated to the right fields, are returning the right results, and so on. The log file is in the DB directory of the BMC Remedy AR System server and is called `arjavaplugin.log`. For more information about setting the log level, see “License Engine Configuration” on page 455.

Debugging tips

Every License type created by the license type wizard creates a corresponding set of rules that are stored in the license engine rule forms and start with a prefix of `RLE:.` The corresponding rules created are:

- Query operations translate into GET rules.
- Create/modify operations translate into UPDATE rules.
- Computational operations translate into CALCULATE rules.
- Comparison operations translate into COMPARE rules.

To debug license types, try some of these steps in the procedures in:

- “If a license type is not running” on page 451
- “If the right CIs are not connected to a certificate” on page 451
- “If compliance actions are not working correctly” on page 452.

IMPORTANT

Make sure not to delete the data in the forms listed below directly because the functionality for the corresponding license types will not work. Also there are a few system rules shipped with 7.5.00 that are loaded in the RLE forms at installation time. These rules should not be modified or deleted since they are used by all license types.

The following is a list of some of the RLE forms and the system rules they contain:

- The RLE:RunTag form has a system rule for the LIVE RunTag
- The RLE:RuleSetType form has two system data rules: one for CONNECTION jobs and the other one for COMPLIANCE jobs
- The RLE:RuleSet, RLE:GetRuleJoin, RLE:UpdateRuleJoin, and RLE:LoopRuleJoin forms have two rulesets called GetScope and CommitData. These are used to process connection rules for all rules.
- Several other RLE forms are also installed with all the default license types that are shipped with the BMC Remedy Asset Management application. Do not modify any of this data in the forms. Only modify or delete license types using the license type wizard.

► **If a license type is not running**

- 1 Make sure that the license type is enabled as described in “Enabling and disabling license types” on page 448.

► **If the right CIs are not connected to a certificate**

- 1 Examine your connection rules to ensure the following points:
 - If you are using the basic model, you have the right questions mapped to the CMDB classes/fields.
 - If you are using the advanced model, you have the right fields mapped to the CMDB fields.
- 2 The following is the sequence of operations that occur when a connection job is run. You can track the sequence of these operations in the `arjavaplugin.log` if needed by turning debugging on as described in “License Engine Configuration” on page 455.
 - a A scope list is updated in a backend table called `AST:LicenseScopeTable`, based on the `qual` parameter defined for the job.
 - b The system gets the certificates for the license type.
 - c For every certificate, the system gets the matching CIs.
 - d The system updates the scope list with the CIs that have matching certificates.
 - e The system performs further operations on the scope table, for example, CIs get related to certificates, exception data gets processed, and so on.

► **If compliance actions are not working correctly**

- 1 Because the results of previous actions can be used in subsequent actions, ensure that all of the actions are in the right sequence.
- 2 Ensure that each action has the correct WHERE qualifiers, so that the right set of data is returned.

Create Contract type

If you need contract types beyond those that come with the BMC Remedy Asset Management application, you can create your own contract types. These contract types are available when a contract manager creates a new contract on the Contract Management console. For more information, see the *BMC Remedy Asset Management User's Guide*. An example of a typical contract type that you might create is Statement of Work.

► **To create a contract type**

- 1 From the Application Administration Console, select the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Create Contract Type, and then click Open.

The Create Contract Type form is displayed as shown in Figure 15-27.

Figure 15-27: Create Contract Type form

Menu Label 1	Selection Code	System Lock
Support	238000	Yes
Warranty	239000	Yes
Lease	240000	Yes
Maintenance	241000	Yes
Software License	242000	Yes
License Management	243000	Yes

- 3 On the Create Contract Type form, type the name of the contract type and click Add.

A BMC Remedy AR System User Note message window indicates that the contract type has been created.

TIP

To modify or delete a contract type, select it from the list and click Modify or Delete.

Configure Inbox Preferences



The inbox is used to track events that individuals need to take care of, such as:

- Contracts that have expired or are about to expire.
- Software license certificates that are not compliant or are approaching noncompliance.
- Software license certificates that have expired or are about to expire.
- Summary results of the engine run.
- List of new CIs that are linked to software license certificates.
- A rule from the Job History form that does not complete successfully.
- Events from the exception table, which can be pushed to the inbox.

From the inbox, you can indicate whether you have dealt with a message. To view the applicable contract or certificate, select the message and click View.

This section describes how to set up preferences for the inbox. For more information about using the inbox, see the *BMC Remedy Asset Management User's Guide*.

► To configure inbox preferences

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Inbox Preferences, and then click Open.

The Inbox Preferences form is displayed as shown in Figure 15-28.

Figure 15-28: Inbox Preferences form

The screenshot shows the 'Inbox Preferences' form within the BMC Remedy IT Service Management interface. The form is titled 'Inbox Preferences' and contains several dropdown menus and text input fields. The fields are arranged in two columns. The top row includes 'Request Type' (set to 'Warranty') and 'Company' (set to 'Calbro Services'). The second row includes 'Event Type' (set to 'Expiring') and 'Status*' (set to 'Enabled'). Below these are two columns of fields: the left column has 'Importance' (High), 'Attention Flag' (Needs Attention), and 'View Access*' (Public); the right column has 'Support Company' (Calbro Services), 'Support Organization' (IT Support), 'Support Group' (Frontoffice Support), and 'Support Contact' (Allen). A 'Clear' button is located at the bottom right of the form area.

- 3 Select the request type. All of the request types for contracts, certificates, and jobs are available for selection.

When you select a request type, the Event Type field is populated with values. Table describes the event types that are available based on the request type that you select.

Table 15-3: Resulting event types based on request type selected

Request type value	Corresponding event types
<ul style="list-style-type: none"> ■ Lease ■ Maintenance ■ Master Contract ■ Support ■ Warranty 	Expiring
	Expired
License Management	Certificates Connected with CIs
Exceptions	Certificates Out of Compliance
	CIs with Multiple Certificates
	CIs without Certificates

Table 15-3: Resulting event types based on request type selected (Continued)

Request type value	Corresponding event types
License Certificate or Software License	Expiring
	Expired
	Not Compliant

- 4 Based on the request type that you selected, select an event type.
- 5 Select an importance:
 - **High** specifies the highest level of importance.
 - **Medium** specifies a middle level of importance.
 - **Low** specifies the lowest level of importance.
- 6 Select an attention flag:
 - **Needs attention** specifies that the contract or license certificate requires that action be taken. This is the default status when a license certificate or contract is created.
 - **Dealt with** indicates a status of Dealt with, which is set from the More Details dialog box that is displayed from a license certificate or contract.
 - **Informational** specifies that no action is required.
- 7 Select a view access:
 - **Public** specifies that events can be seen by everyone who belongs to the specified company.
 - **Group** specifies that events can be seen only by individuals in the specified support group.
 - **Individual** specifies that events can be seen only by individuals within the specified support group.
- 8 Select a company.
- 9 Select a status.
- 10 Fill in the support company, organization, and group fields.
- 11 Click Save and then click Close.

License Engine Configuration



The license engine connects CIs to software licenses and checks compliance of certificates. The license engine needs to be run to process license types and actions that you configure as described in “Configure License Type” on page 417. There are certain parameters you can configure that control:

- The language in which the rules engine runs
- Memory retrieval page size
- Type and level of information captured in the log file.

► To configure the license engine

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > License Engine Configuration, and then click Open.

The License Engine Configuration form is displayed as shown in Figure 15-29.

Figure 15-29: License Engine Configuration form

The screenshot shows a web-based configuration form titled "License Engine Configuration" within the "BMC REMEDY IT SERVICE MANAGEMENT" interface. The form contains the following fields:

- Engine's Locale:** A text input field containing "EN" and a small dropdown arrow to its right.
- Maximum Retrieve Page Size:** A spin box with the value "500" and up/down arrows.
- Log Level:** A dropdown menu currently displaying "DEBUG".

At the bottom of the form, there are two buttons: "Save" and "Close".

- 3 Enter the language in which the engine is to run. This determines the language used by the exception table. The default is EN for English.
- 4 Select the maximum page retrieval size for memory swapping. This parameter can help control the performance of your system.
- 5 Select the type and level of information you want to be written to the log files when the engine runs. By default, this is set to INFO and if you are in the process of debugging then at that time you would set it to DEBUG. Setting it DEBUG can degrade performance.
- 6 Click Save and then click Close.
- 7 After you make changes to these settings, you have to restart your server for the changes to take effect.

Rules



You use the Configure CI Rules form to configure the method of assignment used to automatically select an assignee (not the assigned support group, but the individual within the group) for purchase requisitions in the BMC Remedy Asset Management application. Each company defined in the Company form can have its own assignment rules.

You can configure assignment for one company, or you can define it for all companies using the Global option. When the BMC Remedy Asset Management application uses assignment, for example, when assigning a purchase requisition for assignment, the BMC Remedy Assignment Engine checks the assignment rules for the requester's company. If no rules are found, it uses the rules defined for Global.

You can also use this form to set up preferences for automatically running the engine. For more information see "Configure License Engine Run" on page 458.

► **To configure assignment rules for the BMC Remedy Asset Management application**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Rules, and then click Open.

The Configure CI Rules for is displayed as shown in Figure 15-30.

Figure 15-30: Configure CI Rules form

BMC REMEDY IT SERVICE MANAGEMENT - Asset Management [Help](#)

Configure CI Rules

Company* Calbro Services ▼

Assignment | License Engine

Assignment Engine Integration Yes No

Description

Assignment Process Asset General Assignment - Number ▼

Rule ID ARU

- 3 Select the Assignment tab.
- 4 On the Configure CI Rules form, from the Company list, select the company for which you want to configure assignment, or select the Global option.
Selecting Global configures assignment for all companies.
- 5 To enable assignment, select Yes for Assignment Engine Integration.

- 6 From the Assignment Process list, select the default process for the assignment. The options are:

- **Asset General Assignment - Capacity**—Capacity in the BMC Remedy Assignment Engine is a ratio-based assignment method.

For example, you have two assignees, Assignee A and Assignee B. In the People form, there is a field to set up a capacity number for a person. You can use any number. For example, if you assign Assignee A the number 100 and Assignee B the number 200, Assignee B can handle twice as many assignments as Assignee A. The BMC Remedy Assignment Engine assigns records (for example, purchase requisitions or tickets) to Assignee A every time two records have been assigned to Assignee B.

Specify the capacity for each support staff person in the Capacity Rating field on the people form. See “Adding a support staff person” on page 117.

- **Asset General Assignment - Number**—Tracks the number of tickets assigned to the person. The number assignment process selects the person with the least number of tickets already assigned.
- **Asset General Assignment - Round Robin**—Tracks the last time the person received an assignment. The round robin assignment process selects the person who was least recently assigned an incident.

- 7 Optionally, enter a description.
- 8 For Status, select Enabled.
- 9 Click Save and then click Close.

Configure License Engine Run

This section describes how to configure the license engine to run when you want it to and to perform the functions you want when it is run.

The license engine needs to be run to:

- Associate orphaned CIs with contracts
- Remove expired CIs from the system.

► To run the license engine

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Rules, and then click Open.

- 3 Select the License Engine tab as shown in Figure 15-31.

Figure 15-31: License Engine tab of the Configure CI Rules form

- 4 Select the LIVE run tag name.
- 5 Select the options to specify how and when CIs should be dropped:
 - a If you want to drop CIs after they have expired when the license engine is run, select Drop CIs after License Expiry.
 - b Now you can select number of days after their expiry date when the CIs should be dropped.
 - c From the Run Engine drop-down, select whether you want the license engine to run or not. The default is Yes.
When you select Yes, the engine will run against both connection and compliance rules.
- 6 Select whether or not you want the license engine to be triggered to run when changes or deletions have been made to CIs and certificates.
- 7 Click Save and then click Close.

Sync Asset UI with CMDB

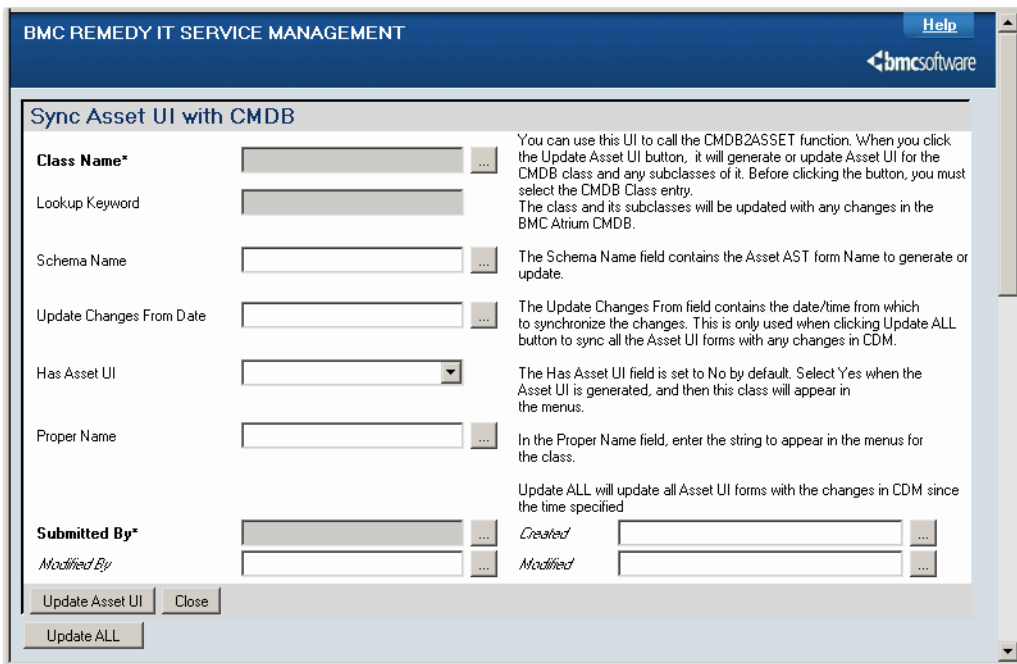
Use this feature to synchronize the BMC Remedy Asset Management forms with BMC Atrium CMDB.

► To synchronize Asset Management forms with BMC Atrium CMDB

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Sync Asset UI with CMDB, and then click Open.

The Synch Asset UI with CMDB form appears as shown in Figure 15-32.

Figure 15-32: Sync Asset UI with CMDB form



- 3 On the Sync Asset UI with CMDB form, click Search, and then select the BMC Remedy Asset Management form to synchronize with BMC Atrium CMDB.
- 4 To create an BMC Remedy Asset Management form, enter the form name in the Schema Name field.
- 5 In the Update Changes From Date field, optionally enter the starting date and time for the changes to be updated. Leave blank to include any changes that occurred after the last update.
- 6 To make the class available in the BMC Remedy Asset Management application, in the Has Asset UI field, select Yes.
- 7 In the Proper Name field, enter the name to appear in BMC Remedy Asset Management forms.
- 8 Click Update Asset UI or Update ALL.

Unavailability Priority

Use this feature to configure the priority of a CI unavailability record based on the unavailability class (Incident or Change) and type (scheduled or unscheduled).

The Company field on this form is disabled to allow for a global priority mapping only.

► To configure unavailability priority

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Unavailability Priority, and then click Open.

The Configure CI Unavailability Priority form appears as shown in Figure 15-33.

Figure 15-33: Configure CI Unavailability Priority form

The screenshot shows the 'Configure CI Unavailability Priority' form in the BMC Remedy IT Service Management - Asset Management console. The form is titled 'Configure CI Unavailability Priority' and includes the following fields and controls:

- Company***: A dropdown menu with the value '- Global -'.
- Unavailability Class***: A dropdown menu with the value 'Change'.
- Unavailability Type***: A dropdown menu with the value 'Scheduled Full'.
- Priority***: A dropdown menu with the value 'Medium'.
- Submitter***: A text input field with the value 'mmanager'.
- Last Modified By**: A text input field.
- Unavailability Priority ID**: A text input field with the value 'AUP'.
- Status***: A group of radio buttons with the following options: Proposed, Enabled (selected), Offline, Obsolete, Archive, and Delete.
- Submit Date**: A date input field.
- Last Modified Date**: A date input field.
- Buttons**: 'Save' and 'Close' buttons at the bottom left.

- 3 On the Configure CI Unavailability Priority form, from the Unavailability Class list, select Incident or Change.
- 4 Select the unavailability type for which you are configuring the priority from the following options:
 - **Scheduled Full**—This indicates plans to take a CI out of service, typically during a scheduled change.
 - **Scheduled Partial**—This indicates plans to change the CI, but not to take it out of service. The CI performance will suffer some degradation during the duration of the change.
 - **Unscheduled Full**—The CI is experiencing a complete service outage that was not planned.
 - **Unscheduled Partial**—The CI is experiencing a service degradation that was not planned.
- 5 From the Priority list, select a priority.

- 6 For Status, select Enabled.
- 7 Click Save.

Approval Process for CI Configurations

This feature is used to configure the default criteria for approving configurations. If the BMC Remedy Change Management application is installed, the application creates a change request for the configuration and sends notification. Otherwise, the application sends notification.

For example, if you define the approval process for company A on this form, when you create a configuration from the Manage Configurations link in the BMC Remedy Asset Management application for company A, the application sends the request for approval to the group or individual specified to approve configurations for that company.

For more information, see Chapter 12, “Configuring approvals.”

► To configure the approval process for configurations

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Approval > Approval Process for CI Configurations, and then click Open.

The Configure Approval Process for Configurations form appears as shown in Figure 15-34.

Figure 15-34: Configure Approval Process for Configurations form

The screenshot shows the 'Configure Approval Process for Configurations' form within the BMC Remedy IT Service Management - Asset Management application. The form is organized into several sections:

- Company Information:** Fields for Company (ABC Company), Region, Site Group, and Site+.
- Change Template:** A dropdown menu for selecting a change template, with a note: "If a Change Template is not chosen, then the timing of the Change, Impact, and Urgency must be selected".
- Change Timing:** Fields for Change Timing (Normal), Impact (4-Minor/Localized), and Urgency (3-Medium).
- Risk Level and Lead Time:** Fields for Risk Level and Lead Time.
- Group Notifications:** Fields for Notification Company (ABC Company), Notification Organization (Customer Support), and Notification Group+ (Desktop Management).
- Individual Notifications:** Fields for Company+, First Name+, Last Name+, and Notification Contact.

At the bottom of the form, there are 'Search' and 'Close' buttons.

-
- 3 On the Configure Approval Process for Configurations form, click the New Request toolbar icon in BMC Remedy User or the New button in your browser.
 - 4 From the Company field, select the company whose approval process you want to configure.
 - 5 To configure a separate approval process for a specific region, site group, or site, make the appropriate selections.
 - 6 From the Group Notifications and Individual Notifications lists, select the group or individual to notify to approve configurations.
 - 7 If the BMC Remedy Change Management application is installed, you must also configure the change request generated for a new configuration:
 - If there is an appropriate change template, select it. The change template indicates the change timing, impact, urgency, risk level, and lead time.
 - If you do not select a change template, you must select the change timing, impact, urgency, and risk level. Optionally, you can specify the lead time to indicate the number of hours of preparation required before a change can be scheduled for implementation.

NOTE

Risk Level 1 is the *lowest* risk and Risk Level 5 is the *highest*.

- 8 Click Save.

CMDB Class Manager Console

You can use the CMDB Class Manager Console to view and manage the data model. The classes you view represent CIs and relationships. To access this function, from the Application Administration Console, choose Asset Management > CMDB Class Manager Console > CMDB Class Manager Console, and then click Open. For detailed information about this console, see the *BMC Atrium CMDB Administrator's Guide*, the *BMC Atrium Core Installation Guide*, and the *BMC Atrium CMDB User's Guide*.

Asset Reconciliation Configuration Console

The BMC Remedy Asset Management application uses the Reconciliation Engine to:

- Reconcile the sandbox dataset against the production dataset if you configured a sandbox dataset, as described in "BMC Remedy Asset Management settings" on page 406.
- Delete CIs that you selected to be deleted, as described in "CI Deletion" on page 410.

You can configure the Reconciliation Engine from the Asset Administration Console. To access this function, choose Asset Management > Reconciliation Engine > Asset Reconciliation Configuration Console, and then click Open.

For details, see the *BMC Atrium Core Installation Guide* and the *BMC Atrium CMDB Administrator's Guide*.

Chapter 16 Configuring the Requester Console application

The Requester Console serves as the front end for the BMC Remedy Change Management and BMC Remedy Incident Management applications. It enables users to quickly submit change requests or incidents. You must perform configuration tasks to set up the Requester Console for use by the requesters in your organization.

NOTE

If you have the BMC Service Request Management installed, the Requester Console is replaced by BMC Service Request Management. For information about BMC Service Request Management, see the *BMC Service Request Management User's Guide*.

The following topics are provided:

- Access point for the Requester Console custom configuration options (page 466)
- Overview of configuring the Requester Console (page 467)
- Granting users access to the Requester Console (page 467)
- Configuring application settings (page 470)
- Configuring summary definitions (page 472)
- Configuring surveys (page 475)
- Configuring request rules (page 476)

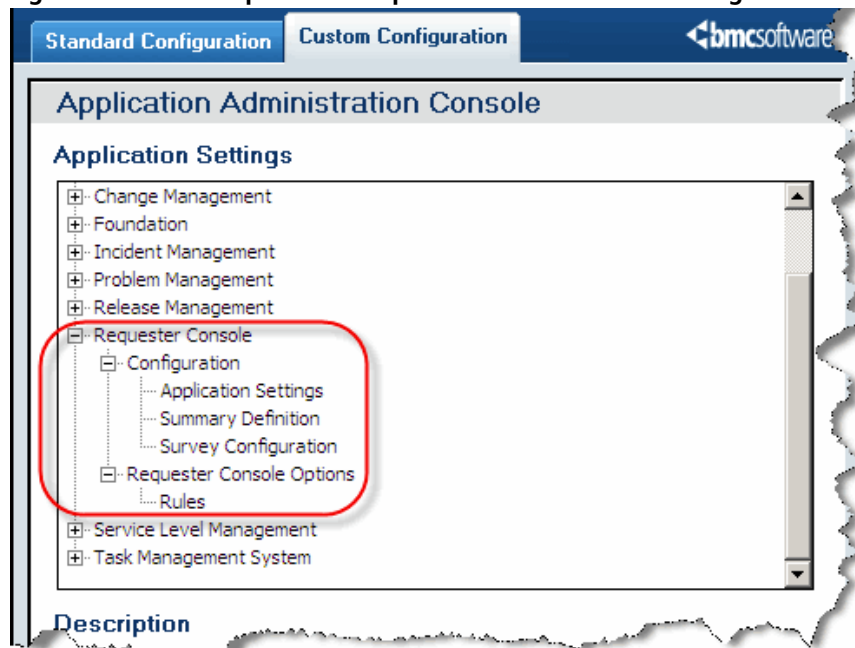
Access point for the Requester Console custom configuration options

The custom configuration for Requester Console described in this section is accessed from the Requester Console expandable command list on the Custom tab of the Application Administration Console as shown in Figure 16-1.

TIP

Carefully read the instructions in the rest of this section before using the configuration commands in the Requester Console expandable list.

Figure 16-1: Access point for Requester Console custom configuration



Overview of configuring the Requester Console

Two primary steps are required to set up the Requester Console:

- Step 1 Set up the users.
- Step 2 Perform the configuration.

These configuration tasks can be done by an application administrator or another user who has the required permissions, or several users who have the appropriate permissions for each configuration task, depending on the size of your organization or your business practices.

Two types of users use the Requester Console: *users* or *requesters*, who require support from the IT organization, and a *Requester Console Master* user, who can view all users' requests and troubleshoot requests that have failed or are in error state. Users can also be known or unknown.

For information about permissions, see Appendix A, "Permissions and functional roles."

IMPORTANT

To use the Requester Console, you must configure group assignment for the General event type. See "Group assignment" on page 198.

Granting users access to the Requester Console

The users of the Requester Console are requesters who need assistance from the IT support staff to have a change implemented or an incident resolved. The console is the entry point for users to define, view, update, or cancel service requests. Any member of your organization can be a requester.

Granting access to known users

Known users are those who are defined by a People record. For more information about People records, see Chapter 5, "Configuring people information," When an individual has been defined by a People record, then that individual just needs to be assigned the appropriate permission to access the Requestor Console.

To use the Requester Console to submit service requests, users must have one of the following types of permission:

- **Requester Console Master**—This user is responsible for troubleshooting service requests. The Requester Console Master can view requests submitted by other users. Requester Console Master permissions automatically give this user Command Event Master permissions to be able to view events or requests and troubleshoot them.
- **Registered user**—This user has been defined and given login information in the People form.
- **Unknown user**—Users are considered to be unknown users if they have not been given login information, even if they have been defined in the People form.

► To give known users access to the Requester Console

- 1 Add the user using the People record and assign the user login information on the People form. Assign someone the Requestor Console Master permission. For information about assigning permissions to people, see “Adding a support staff person” on page 117.
- 2 Set the Tenancy Mode to either Single-Tenancy or Multi-Tenancy mode, depending on the requirements of your organization. See “System settings” on page 218.

Granting access to unknown users

For unknown users who do not have a BMC Remedy AR System login to be able to access the Requester Console, the BMC Remedy AR System server Allow Guest User option must be selected. The Allow Guest User option is available only in single-tenancy mode.

Also, the AR Submitter locked mode option must be selected for users with a read-only license to respond to surveys. A default People record with a valid BMC Remedy AR System login must be defined in the application for use by unknown users.

If a user meets any of the following conditions, the user type is “unknown user”:

- The user has an entry in the People form and in the AR System User form, but does not have an AR System Login ID in the People form.
- The user has an entry in the People form, but does not have an entry in the AR System User form or an AR System Login ID in the People form. This type of user is also an AR System Guest User.
- The user does not have an entry in the People form, but has an entry in the AR System User form.
- The user does not have an entry in the People form or in the AR System User form. This type of user is also an AR System Guest User.

Some other factors that control allowing unknown users access to the Requester Console follow:

- Unknown users are not allowed access if the multi-tenancy option is selected. Multi-tenancy restricts access of data from different companies or business units. For more information about multi-tenancy, see the *BMC Remedy IT Service Management Guide to Multi-Tenancy*.
- In addition to setting the Tenancy Mode to Single-Tenancy, the Allow Unknown Users option must be set to Yes and login information added.

► To give unknown users access to the Requester Console

- 1 Set the following BMC Remedy AR System configuration options on the BMC Remedy AR System Administration: Server Information form. For information about setting the BMC Remedy AR System options, see the *BMC Remedy Action Request System Configuration Guide* guide.
 - a Select the Allow Guest Users option in the Configuration tab as shown in Figure 16-2.

Figure 16-2: Allow Guest Users option in the Server Information form

The screenshot shows the 'Server Information' form with the 'Configuration' tab selected. The 'Allow Guest Users' checkbox is checked and highlighted with a red box. Other settings include:

- Users Prompted For Login: By Preference
- Max Entries Returned By GetList: 0
- Server Table Field Chunk Size: 1000
- Server Language: ENU;WESTERN
- User Email Notices From: ARSystem
- Minimum API Version: 0
- Default Home Form: Home Page
- Max Number of Password Attempts: 0
- Next Request ID Block Size: 1
- Allow Guest Users
- Give Guest Users Restricted Read
- Allow Unqualified Searches
- Administrator-Only Mode
- Disable Archive
- Development Cache Mode ***
- Server Group Member
- Disable Admin Operations
- Disable Escalations
- Disable Alerts
- Verify Alert Users
- Enable Multiple Assign Groups
- Disallow Non Unicode Clients

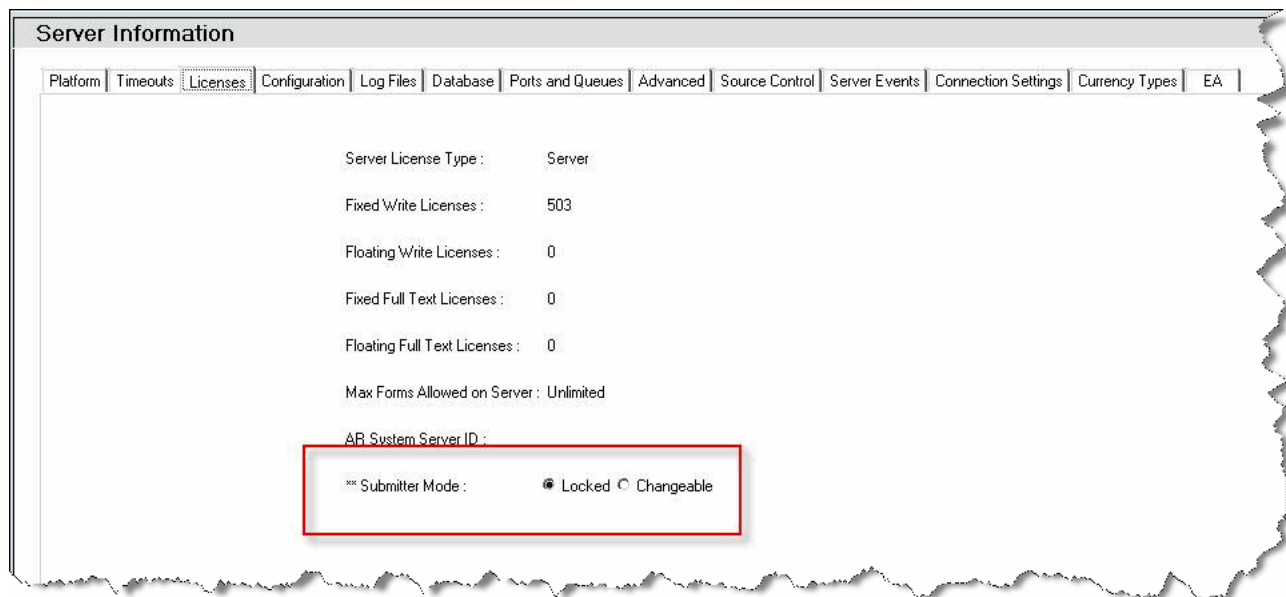
Display Property Caching: ***

- Disable All Display Property Caching
- Cache VUI Display Property Only
- Cache Field Display Property Only
- Cache All Display Properties

*** Changes to this setting requires server restart

- b Set Submitter Mode to Locked on the Licenses tab as shown in Figure 16-3, so users with a read-only licenses can cancel requests and respond to surveys.

Figure 16-3: Submitter Mode option in the Server Information form



- c Set the Allow Unknown Users option to Yes and add login information as described in the next section, “Configuring application settings.”
- 2 Set the Tenancy Mode to Single-Tenancy. See “System settings” on page 218.

Configuring application settings

The Request Management Application Settings form is used to configure general application settings for the Requester Console. Use this form to determine if your organization supports multi-tenancy or usage by a single default company. If your organization allows unknown users to access the Requester Console to submit service requests, or whether your organization will use the Requester Console as the front-end application.

► **To configure application settings**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Requester Console > Configuration > Application Settings, and then click Open.
The Request Management Application Settings form appears.

Figure 16-4: Application Settings form

The screenshot shows the 'Application Settings' form for 'Request Management'. At the top, it says 'BMC REMEDY IT SERVICE MANAGEMENT - Request Management' with a 'Help' button and the BMC Software logo. The form title is 'Application Settings'. It contains several sections:

- Last Modified:** Last Modified By: dev_aman; Last Modified Date: 3/26/2006 11:03:50 AM.
- Tenancy Mode*:** Multi-Tenancy (dropdown); Company: (empty text field).
- Allow Unknown Users*:** No (dropdown). Below this are fields for Login ID, Last Name, First Name, and Full Name, each with a small '...' icon.
- Default Request ID Text*:** In Process (text field).
- Enable Requester Console*:** Yes (dropdown).

 A large text block explains that Tenancy mode and company are defined in the System Settings form. It notes that Multi-Tenancy requires defining single-tenancy to enable unknown users, and that 'No' for unknown users requires AR login information in the People form. At the bottom, there are 'Save' and 'Close' buttons.

- 3 Fill in the fields described in the following table:

Field name	Description and action
Tenancy Mode	<ul style="list-style-type: none"> ■ If Multi-Tenancy appears, then your organization uses the Company field for access control. <p>Note: If Multi-Tenancy appears, you cannot allow unknown users to access the system; only registered users are allowed access.</p> <ul style="list-style-type: none"> ■ If Single-Tenancy appears, then your organization uses a default company. <p>For more information about setting tenancy mode, refer “System settings” on page 218.</p>
Company	If Single-Tenancy appears, the name of the default company appears in this field.

Field name	Description and action
Allow Unknown Users	<p>Select Yes or No <i>only</i> if Single-Tenancy appears in the Tenancy Mode field.</p> <ul style="list-style-type: none"> ■ If Multi-Tenancy appears in the Tenancy Mode field, this field is set to No. ■ If Single-Tenancy appears in the Tenancy Mode field and you select Yes, specify the proxy login information.
Default Request ID text	<p>Specify the default text that appears in the Request ID column of the My Requests table on the Requester Console before an ID is supplied from the back end application, for example, In progress.</p> <p>This column is filled with the Change (CRQ) or Incident (INC) instance ID. If there is a time lag between the user's submitting the request and the back end application's creating the request, the default text that you specify appears.</p>
Enable Requester Console	<p>Select Yes or No.</p> <ul style="list-style-type: none"> ■ If you select Yes, the Requester Console is the front end for requesters to submit requests to the back end applications. ■ If you select No, the requester or support staff must submit requests directly from the Change or Incident form.

4 Click Save.

Configuring summary definitions

Use the Summary Definition form to configure predefined summaries of requests for the Request Wizard. The summary items that you configure are available from the Summary list on the Request Wizard. Requesters are then able to select from the list of summary items when creating their service requests.

NOTE

You need Summary Definition Config or Request Console Master permissions to configure summary definitions. Users in the Incident Config and Change Config permission groups automatically inherit Summary Definition Config permissions.

IMPORTANT

Before configuring summary definitions, make sure that categorization values have been configured. Categorization is configured on the Operational Catalog Setup form.

► To configure summary definitions

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Requester Console > Configuration > Summary Definition, and then click Open.

The Summary Definition form appears.

Figure 16-5: Summary Definition form

The screenshot shows the 'Summary Definition' form in the BMC Remedy IT Service Management interface. The form is titled 'Summary Definition' and is part of the 'Request Management' section. It contains several input fields and dropdown menus for configuring a summary definition. The fields include: Summary*, Description, Summary Categorization*, Company**+, Request Type*, Impact*, System Status* (set to 'Active'), Operational Categorization (with sub-sections for Tier 1*, Tier 2, and Tier 3), and a 'Define Keywords' section with five keyword fields (Keyword 1 through Keyword 5). At the bottom of the form, there are 'Save' and 'Close' buttons. The BMC Remedy logo and 'bmcsoftware' branding are visible in the top right corner.

- 3 Fill in the fields described in the following table:

Field name	Description and action
Summary	Enter a summary of the request, for example, Reset Password.
Summary Categorization	Enter or select a category for the summary, for example, Account Access. Use summary categorization to group the summaries in a meaningful way to people using the Request Console. In this example, a user making a request could select Account Access> Reset Password from the Summary list. The Account Access categorization might also be used for the Create New Account request.
Company	Select the company to which this summary is available. If you want this summary to be available to all companies, including guest users, select Global.

Field name	Description and action
Request Type	Select the request type for this summary definition. <ul style="list-style-type: none"> ■ Incident—Summary definitions belonging to the Incident type create a incident requests. (You must have the BMC Remedy Incident Management application installed.) ■ Change—Summary definitions belonging to the Change type create change requests. (You must have the BMC Remedy Change Management application installed.)
Impact	Select an impact for this summary definition. The impact depends on how your organization handles the different types of service requests. For example, the impact level of a service request for installing software on a single user’s computer might be Minor/Localized, while installing software for a department or company might be Significant/Large or Extensive/Widespread.
System Status	Select Active or Inactive.
Tier 1	Select the operational category to which this summary definition belongs. For example, for a summary definition of Reset Password, the Tier 1 could be Infrastructure Service or Password. Category is associated with a company, so the category values that appear are those that are available to your company.

4 Fill in the optional fields described in the following table:

Field name	Description and action
Description	Enter a description of the summary definition.
Tier 2 Tier 3	If your organization has defined two or three tiers of operational categories, you can further classify the summary definition. For example, for a Tier 1 of Infrastructure Service, the Tier 2 could be Passwords, and the Tier 3 could be Exchange Server.
Define Keywords	Enter keywords for this summary definition. The keywords that you define are used to look up possible solutions for incidents from the solution database. (This is true only if the BMC Remedy Problem Management application is installed and the solution database entry is set to the specific categorization value.) For example, for a summary definition of Reset Password, a possible keyword could be Password.

5 Click Save.

Configuring surveys

Use the Survey Question Configuration form to set up survey questions for your requesters. Surveys give the Business Service Manager or IT Manager an indication of customer satisfaction levels and how the BMC Remedy Service Desk is performing.

You can configure a survey for a specific company or select Global to make the survey available to all companies.

NOTE

You must have Requester Console Config or Requestor Console Master permissions to access this form.

► To configure surveys

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Requester Console > Configuration > Survey Configuration, and then click Open.

The Survey Question Configuration form appears.

- 3 Select the company to which this survey applies, or select Global to make this survey available to all companies.
- 4 For Request Type, select Change or Incident.

The survey is specific to the specified request type, either change or incident. (The application must be installed for the appropriate request type to appear.)

- If users select a summary definition that is mapped to the change request type, they receive the survey if the Request Type is set to Change.
- If users select a summary definition that is mapped to the incident request type, they receive the survey if the Request Type is set to Incident.

- 5 In the four Question fields, enter questions to which you want requesters to respond.

Only one question is required, but you can enter up to four questions.

- 6 Click Save.

Configuring request rules

Use the Request Rules form to set up rules around auto-close of requests and surveys on a per-company basis.

NOTE

You must have Requester Console Config or Requester Console Master permissions to access this form.

► To configure request rules

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Requester Console > Requester Console Options > Rules, and then click Open.
The Request Rules form appears.
- 3 To modify an existing rule, search for it.
The BMC Remedy ITSM installation includes global request rules, which apply to all companies. For the global request rules, the company is specified as Global.
- 4 Select the company to which this rule applies.
- 5 Select the status.
- 6 Define survey rules:
 - **Enable Survey**—Select Yes if you want requesters to receive surveys after their requests have been resolved.
 - **Last Surveyed Days**—Select the number of days after the last survey was responded to that a survey is sent.
- 7 Optionally enter a description.
- 8 Click Save.

Section

IV Appendixes

The following appendixes are provided:

- Appendix A, “Permissions and functional roles”
- Appendix B, “Create license type examples”

Appendix

A Permissions and functional roles

This section provides information about permissions and functional roles in the BMC Remedy IT Service Management Suite (BMC Remedy ITSM Suite).

The following topics are provided:

- Permissions (page 480)
- Functional roles (page 494)

Permissions

Permissions are used to grant users access to applications and modules in the BMC Remedy ITSM Suite. The following sections describe the available permissions:

- “BMC Remedy AR System permissions” on page 481
- “Foundation BMC Remedy ITSM permissions” on page 481
- “BMC Remedy Asset Management permissions” on page 484
- “BMC Remedy Change Management permissions” on page 488
- “Release Management permissions” on page 489
- “Financial permissions” on page 490
- “BMC Remedy Incident Management permissions” on page 491
- “BMC Remedy Problem Management permissions” on page 492
- “Request permissions” on page 493
- “Task permissions” on page 493

NOTE

For information about assigning permissions to users, see “Adding a support staff person” on page 117.

TIP

An Admin or Master permission always supersedes a User permission, and a User permission always supersedes a Viewer permission. Where there is a Submitter permission, it is superseded by the Admin (or Master) and User permissions. For example, Asset Admin supersedes Asset User, and Asset User supersedes Asset Viewer. Incident User supersedes Incident Submitter and Incident Viewer.

BMC Remedy AR System permissions

These BMC Remedy AR System Administrator permissions are used in BMC Remedy ITSM Suite applications.

Table A-1: BMC Remedy AR System permissions

Permission	Description
Administrator	<p>Grants administrator access to BMC Remedy ITSM Suite applications through BMC Remedy Developer Studio. Administrator responsibilities include installing and maintaining BMC Remedy ITSM Suite applications and making changes within BMC Remedy ITSM.</p> <p>Generally reserved for developers who need access to BMC Remedy AR System and system administrators who need access to BMC Remedy ITSM system forms.</p> <p>Note: This permission does not grant <i>user</i> access to forms. Additional application and module permissions are required for form access.</p>

Foundation BMC Remedy ITSM permissions

The following permissions are used in BMC Remedy ITSM applications.

Table A-2: BMC Remedy ITSM permissions

Permission	Description
ASE-Administrator	<p>Grants access to the following information:</p> <ul style="list-style-type: none"> ■ BMC Remedy Assignment Engine configuration ■ IT Skills attribute type for people
Approval Admin	Grants access to BMC Remedy Approval Server administration.
Command Event Master	<p>Grants access to configure Command Automation Interface information:</p> <ul style="list-style-type: none"> ■ Application registry ■ Command parameter definitions ■ Grants access to CAI Event forms for handling event errors
Config Categorization Admin	<p>Grants access this information:</p> <ul style="list-style-type: none"> ■ Catalog mappings (submit, modify, and delete) ■ Generic catalog entries (submit, modify, and delete) ■ Product catalog entries (submit, modify, and delete) ■ Operational catalog entries (submit, modify, and delete) ■ Vendor companies (create)

Table A-2: BMC Remedy ITSM permissions (Continued)

Permission	Description
Config Categorization User	Grants access to submit, modify, and delete the following entries and their company associations: <ul style="list-style-type: none"> ■ Generic catalog ■ Product catalog ■ Operational catalog Only associations to existing categories can be added or deleted.
Config Group Mapping Admin	Grants access to submit, modify, and delete the following information: <ul style="list-style-type: none"> ■ Group assignment ■ Script association mappings
Contact Location Admin	Grants access to submit, modify, and delete the following information: <ul style="list-style-type: none"> ■ Company ■ Site ■ Geographic location
Contact Organization Admin	Grants access to submit, modify, and delete the following information: <ul style="list-style-type: none"> ■ Company information ■ People information ■ Support groups ■ Approval mappings <p>Note: People with this permission cannot actually delete a People record. Instead, they have the authority to change the profile status of the People record to Delete. Then the record has to be deleted by a user with BMC Remedy AR System Administrator permission.</p>
Contact People Admin	Grants access to the following information: <ul style="list-style-type: none"> ■ Non-support staff people information (submit, modify, delete) ■ All people information entries <p>Note: People with this permission cannot actually delete a People record. Instead, they have the authority to change the profile status of the People record to Delete. Then the record has to be deleted by a user with BMC Remedy AR System Administrator permission.</p>
Contact People HR Admin	Provides access to the following information accessed from the Attributes tab on the People form: <ul style="list-style-type: none"> ■ HR attendance management ■ HR time management ■ Benefit information ■ Travel profile
Contact People User	Grants access to submit and modify non-support staff people information, but not to modify the Profile Status.

Table A-2: BMC Remedy ITSM permissions (Continued)

Permission	Description
Contact Support Admin	Grants access to the following information: <ul style="list-style-type: none"> ■ People information (submit, modify, delete) ■ Profile Status (modify) ■ Approval mappings
DSL Master	Grants write access to all Product Catalog Console functions: <ul style="list-style-type: none"> ■ Create products and suites ■ Create patch files ■ Create SLIs
DSL Viewer	Grants view access to Product Catalog Console functions: <ul style="list-style-type: none"> ■ View products and suites ■ View files ■ View SLIs
Licensing	Grants access to assign, modify, and delete BMC Remedy AR System User Licensing.
Notification Admin	Grants access to modify the Notification Engine configuration forms.
Security	Grants access to reset an existing BMC Remedy ITSM user's password.

BMC Remedy Asset Management permissions

The following permissions are used in the BMC Remedy Asset Management application.

Table A-3: BMC Remedy Asset Management permissions

Permission	Description
Asset Admin	<p>Grants administration access to the BMC Remedy Asset Management application for the following tasks:</p> <ul style="list-style-type: none"> ■ Access all contract items and can do all contract administration ■ Manage CIs (write access) ■ Relate one CI to another CI ■ Manage inventory ■ Manage contracts (write access) ■ Manage configurations ■ Manage costs ■ Bulk update functions ■ Schedule functions <p>This permission does not provide access to purchasing or receiving. It also requires an application fixed or floating license for full modify access.</p>
Asset Config	<p>Grants access to modify BMC Remedy Asset Management forms to configure the following information:</p> <ul style="list-style-type: none"> ■ Access to configure contract-related forms in addition to asset configuration ■ BMC Remedy Asset Management application rules ■ BMC Remedy Asset Management application settings ■ CIs ■ License management ■ Unavailability priority <p>This permission does not provide access to purchasing or receiving. It also requires an application fixed or floating license for full modify access.</p>

Table A-3: BMC Remedy Asset Management permissions (Continued)

Permission	Description
Asset User	<p>Grants general access to the BMC Remedy Asset Management application, which enables users to perform the following tasks:</p> <ul style="list-style-type: none"> ■ Access to all contract items and has contract user rights for all contracts ■ Create, modify, and delete the following CI functions: <ul style="list-style-type: none"> ■ Contracts ■ Configurations ■ Costs ■ Schedules ■ Outages ■ Returns ■ Activities ■ View all other CI functions ■ Relate CIs to incidents or other types of records but not to another CI ■ Create, modify, and delete the following from CIs but not from the Asset Management console: <ul style="list-style-type: none"> ■ Contracts ■ Configurations ■ Costs ■ Schedule functions <p>This permission does not provide access to inventory management, bulk update functions, purchasing, or receiving. It also requires an application fixed or floating license for full modify access.</p> <p>Note: Modification access to CI data within CI forms is based on Support Group Contact associations. If users belong to a Support Group associated with a CI as either supported by, created by, or managed by, they have equivalent Asset Admin access to that CI record, with the exception of CI-to-CI relationships.</p>

Table A-3: BMC Remedy Asset Management permissions (Continued)

Permission	Description
Asset Viewer	<p>Grants read access to the BMC Remedy Asset Management application, which enables users to do the following:</p> <ul style="list-style-type: none"> ■ Has contract viewer permissions ■ View CIs ■ View the following from CIs but not from the BMC Remedy Asset Management console: <ul style="list-style-type: none"> ■ Contracts ■ Configurations ■ Schedule functions <p>Does not provide access to inventory management, cost management, bulk update functions, purchasing, receiving, or the SAM Console.</p> <p>Automatically granted when the Incident Master, Incident User, Infrastructure Change Master, Infrastructure Change User, Problem Master, Problem User, Purchasing User, Task Manager, or Task User permission is granted.</p>
Purchasing User	<p>Grants general access to purchasing functions in the BMC Remedy Asset Management application:</p> <ul style="list-style-type: none"> ■ Write access to purchase requisitions (including line items) assigned to the person’s support group ■ Write access to purchase orders <p>Does not provide access to the following functions:</p> <ul style="list-style-type: none"> ■ CI management ■ Inventory management ■ Contract management module ■ Configuration management ■ Cost management ■ Bulk update functions ■ Schedule functions ■ Receiving
Receiving User	<p>Grants general access to receiving functions in the BMC Remedy Asset Management application.</p> <p>Does not provide access to the following functions:</p> <ul style="list-style-type: none"> ■ CI management ■ Inventory management ■ Contract management ■ Configuration management ■ Cost management ■ Bulk update functions ■ Schedule functions ■ Purchasing

Table A-3: BMC Remedy Asset Management permissions (Continued)

Permission	Description
Contract Admin	<p>Has full access to contracts:</p> <ul style="list-style-type: none"> ■ Has access to the Software Asset Management (SAM) and Contract Management Consoles, to work with contract and license certificate management. <p>Also, Contract Admin has full Asset Viewer permissions.</p>
Contract Config	<p>Has full access to:</p> <ul style="list-style-type: none"> ■ Create new contracts and modify them. ■ Create new contract types. <p>This permission is needed to create new license types, and to configure the License Engine. If there is any other Contract / SWLM configuration, this permission also applies. For example, with this permission any contract-related forms can be configured.</p>
Contract User	<p>Can access contracts as follows:</p> <ul style="list-style-type: none"> ■ Can modify contracts if they are public. Can also modify internal contracts, provided they belong to the managed by group. ■ Can add software licenses to software contracts. ■ Has access to the Contract Management console. <p>Also, Contract User has full Asset Viewer permissions.</p> <p>Note: New contracts cannot be created with Contract User permission.</p>
Contract Viewer	<p>Can access contracts as follows:</p> <ul style="list-style-type: none"> ■ Can view contracts and software licenses. ■ Has access to the Contract Management console. ■ But, Contract Viewer has no access to the SAM Console. <p>Also, Contract Viewer has full Asset Viewer permissions.</p>

BMC Remedy Change Management permissions

These permissions are used in the BMC Remedy Change Management application.

Table A-4: BMC Remedy Change Management permissions

Permission	Description
CM Dashboard User	Grants access to view BMC Remedy Change Management Dashboard forms.
Infrastructure Change Config	Grants access to modify this information on BMC Remedy Change Management configuration forms: <ul style="list-style-type: none"> ■ BMC Remedy Change Management rules ■ Change processes ■ Change template ■ Prioritization ■ Risk selection Requires an application fixed or floating license.
Infrastructure Change Master	Grants access to the BMC Remedy Change Management application with additional privileges to modify infrastructure change requests and tasks independent of any functional roles or support group affiliations. Also grants access to create and modify approval mappings. Requires an application fixed or floating license.
Infrastructure Change Submit	Grants access to query and submit change requests in the BMC Remedy Change Management application. Requires an application read license.
Infrastructure Change User	Grants general access to open, query, submit, and modify change requests in the BMC Remedy Change Management application. It requires an application fixed or floating license. Also receives access to a link to BMC Atrium Product Catalog Console. Note: Modification access can be restricted by functional roles and support group relationships.
Infrastructure Change Viewer	Grants view access to the BMC Remedy Change Management application. Enables users to query change requests and tasks and to submit change request information and attachments. It can be used with the Infrastructure Change Submit permission.

Release Management permissions

These permissions are used in the Release Management module.

Table A-5: Release Management permissions

Permission	Description
Activity Config	Grants access to the following information: <ul style="list-style-type: none"> ■ Activity rules
Activity Viewer	Grants visibility access to the Activity module. With visibility access the user can query only Activities.
Activity User	Grants general access to the Activity module. With Activity User access, the user is permitted to open, query, create, and modify activities and inherently obtain similar access to all activity children or relationship forms. <i>Note:</i> Modification access may be restricted through the additional use of Functional Roles and Support Group affiliations.
Release Config	Grants access to set up and modify the Release Management module configuration forms.
Release Master	Grants access to the Release Management module with additional privileges to modify release requests independent of any Functional Roles or Support Group affiliations. This permission also grants access to create and modify Release Management approval mappings.
Release User	Grants general access to the Release Management module. With Release User access, the user is permitted to open, query, submit, and modify release requests and inherently obtain similar access to all release children or relationship forms. <i>Note:</i> Modification access may be restricted through the additional use of Functional Roles and Support Group affiliations.
Release Viewer	Grants visibility access to the Release Management module. With visibility access the user can query only Release Requests.

Financial permissions

The following permissions are used with the Cost Management feature.

Table A-6: Financial permissions

Permission	Description
Cost Manager	<p>Grants full access to configure, create, modify, and delete all cost records in the finance subsystem. The Cost Manager is responsible for running reports and generating chargebacks.</p> <p>Provides access to the following records:</p> <ul style="list-style-type: none"> ■ Cost categorization ■ Cost center configuration ■ Create cost rate templates ■ Finance rules configuration <p>Requires an application fixed or floating license for full modify access.</p>
Cost User	<p>Automatically granted. Not visible in BMC Remedy ITSM applications.</p> <p>Grants access to create, modify, and delete all cost records in the finance subsystem.</p>
Cost Viewer	<p>Automatically granted. Not visible in BMC Remedy ITSM applications.</p> <p>Grants access to view cost records in the finance subsystem.</p>

BMC Remedy Incident Management permissions

These permissions are used in the BMC Remedy Incident Management application.

Table A-7: BMC Remedy Incident Management permissions

Permission	Description
Incident Config	<p>Grants access to modify the following information in the BMC Remedy Incident Management configuration forms:</p> <ul style="list-style-type: none"> ■ Decision tree ■ Impact values ■ Incident rules ■ Prioritization ■ Priority weight values ■ Urgency values ■ Work info inbound and outbound communications ■ BMC Remedy Incident Management application settings ■ Script database ■ Template <p>Requires an application fixed or floating license.</p>
Incident Master	<p>Grants access to the BMC Remedy Incident Management application, with additional privileges to modify incidents independent of any functional roles or support group affiliations.</p> <p>Requires an application fixed or floating license.</p>
Incident Submitter	<p>Grants access to query and submit incidents in the BMC Remedy Incident Management application.</p> <p>Can be used with the Incident Viewer permission.</p> <p>Requires an application read license.</p>
Incident User	<p>Grants access to open, query, submit, and modify incidents in the BMC Remedy Incident Management application. Modification access can be restricted by functional roles and support group affiliations.</p> <p>Also receives access to a link to BMC Atrium Product Catalog Console.</p> <p>Requires an application fixed or floating license.</p>
Incident Viewer	<p>Grants view access in the BMC Remedy Incident Management application. Enables users to query incidents and to submit attachment entries.</p> <p>Can be used with the Incident Submitter permission.</p>

BMC Remedy Problem Management permissions

The following permissions are used in the BMC Remedy Problem Management application.

Table A-8: BMC Remedy Problem Management permissions

Permission	Description
Problem Config	<p>Grants access to set up and modify the following information in the BMC Remedy Problem Management configuration forms:</p> <ul style="list-style-type: none"> ■ Impact values ■ Prioritization ■ Priority weight values ■ Problem rules ■ Urgency values <p>Requires an application fixed or floating license.</p>
Problem Master	<p>Grants access to the BMC Remedy Problem Management application, with additional privileges to modify the solution database, known errors, and problem investigations independent of any functional roles or support group affiliations.</p> <p>Requires an application fixed or floating license.</p>
Problem Submitter	<p>Grants access to query and submit to the solution database, known errors, and problem investigations in the BMC Remedy Problem Management application.</p> <p>Requires an application read license.</p>
Problem User	<p>Grants access to open, query, submit, and modify entries in the solution database, known errors, and problem investigations in the BMC Remedy Problem Management application.</p> <p>Requires an application fixed or floating license.</p> <p>Also receives access to a link to BMC Atrium Product Catalog Console.</p> <p>Note: Modification access can be restricted by functional roles and support group affiliations.</p>
Problem Viewer	<p>Grants view access to the BMC Remedy Problem Management application. Enables users to query the solution database, known errors, and problem investigations and to submit attachment entries.</p> <p>Can be used with the Problem Submitter permission.</p>

Request permissions

The following permissions are used in the Requester Console.

Table A-9: Request permissions

Permission	Description
Requester Console Config	Grants access to modify all requester administrative forms except the Summary Definition form. Enables users to perform the following tasks: <ul style="list-style-type: none"> ■ Modify application settings ■ Configure survey questions ■ Modify request rules
Requester Console Master	Grants access to modify the Service Request form.
Summary Definition Config	Grants access to modify the Summary Definitions form.

Task permissions

The following table lists permissions that are used in the Task Management System.

Table A-10: Task permissions

Permission	Description
Task Administrator	Grants access to modify all task management forms.
Task Application Config	Grants access to modify the following information on task management integration configuration forms: <ul style="list-style-type: none"> ■ Application configuration ■ Return code configuration
Task Manager	Grants access to relate tasks to other records, such as incidents, problem investigations, and change requests.
Task Process Config	Grants access to modify the following information on task management assignment and task configuration forms: <ul style="list-style-type: none"> ■ Application configuration ■ Return code configuration ■ Assignment configuration ■ BMC Remedy Assignment engine configuration ■ Group assignment
Task User	Grants access to tasks that have been created or related.

Functional roles

Functional roles are used for notifications and to extend access granted by permissions.

Only support staff members can be given functional roles. For information about assigning functional roles, see “Adding a support staff person” on page 117.

The following table lists the functional roles defined in the BMC Remedy ITSM applications.

Table A-11: Functional roles

Functional role	Application	Purpose
Availability Manager	BMC Remedy Asset Management application BMC Remedy Change Management application BMC Remedy Incident Management application BMC Remedy Problem Management application	Used for informational purposes and for BMC SLM escalation notifications.
Broadcast Submitter	BMC Remedy Asset Management application BMC Remedy Change Management application BMC Remedy Incident Management application BMC Remedy Problem Management application	Allows users to create and modify broadcast messages.
Facilitator	BMC Remedy Asset Management application BMC Remedy Change Management application BMC Remedy Incident Management application BMC Remedy Problem Management application	Used only for informational purposes.
Incident Manager	BMC Remedy Incident Management application	Used for informational purposes and for SLA escalation notifications.
Infrastructure Change Approver	BMC Remedy Change Management application	Identifies support people within support groups as approvers for infrastructure changes. If a support group is defined to approve changes, this role must be granted to at least one person in the group so that person can approve changes.
Infrastructure Change Assignee	BMC Remedy Change Management application	Grants full access to infrastructure changes assigned to the assignee’s group. Also grants access to the Manager view of the Change Management Console.
Infrastructure Change Manager	BMC Remedy Change Management application	Grants full access to infrastructure changes assigned to the manager’s group. Also grants access to the Manager view of the Change Management Console.

Table A-11: Functional roles (Continued)

Functional role	Application	Purpose
Problem Manager	BMC Remedy Problem Management application	Grants control of all problem investigations, known errors, and proposed solution database entries assigned to their respective group.
Release Approver	BMC Remedy Change Management application	Identifies support people within support groups as approvers for release records. If a support group has been defined to approve releases, this role must be granted to at least one individual within the group so that the individual can approve releases.
Release Manager	BMC Remedy Asset Management application BMC Remedy Change Management application BMC Remedy Incident Management application BMC Remedy Problem Management application	Grants access to release records that are assigned to the Release Management Support Group. Provides access to reassign releases.
Support Group Admin	BMC Remedy Asset Management application BMC Remedy Change Management application BMC Remedy Incident Management application BMC Remedy Problem Management application	Allows users to add or remove support staff members from their support groups. Also allows users to modify their corresponding Support Group entry and Incident and Change templates.
Support Group Lead	BMC Remedy Incident Management application	Allows the Support Group Lead of the Incident Owner Group to modify incidents that are closed. Can be applied to either the Assigned or the Owner Group in the Incident form.
Support Group Manager	BMC Remedy Incident Management application	Allows the Support Group Manager of the Incident Owner Group to modify incidents that are closed. Can be applied to either the Assigned or Owner Group in the Incident form. Also grants access to the Incident Management Console.

B Create license type examplesv

This section provides examples to show you how to create license types in the BMC Remedy Asset Management application. For more information about creating license types, see “Configure License Type” on page 417.

The following topics are provided:

- Site license type example—basic mode (page 498)
- Per instance license type example—basic mode (page 508)
- BMC Remedy AR System fixed and floating license type example—advanced mode (page 520)

Site license type example—basic mode

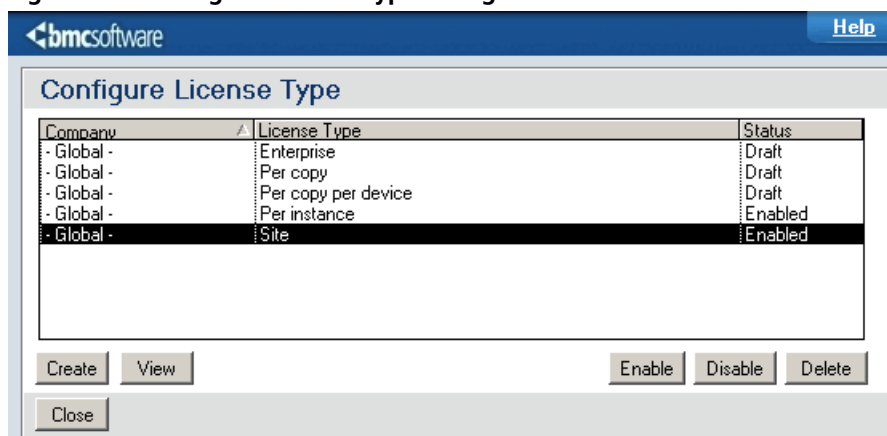
This section provides an example to show you how to create a custom license type in basic mode based on the default Site license type. For more information about default license types, see “Default system license types” on page 418.

► **To create the site example license type in basic mode**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Configure License Type, and then click Open.

The Configure License Type dialog box appears as shown in Figure B-1.

Figure B-1: Configure License Type dialog box



- 3 Click Create.

The license type wizard starts.
- 4 Update the Create License Type page as follows.
 - a Select Global as the company. This makes the license type available to all companies.
 - b Enter a name for the license type. For example, you would enter Site Example.

NOTE

Ensure that you do not name this license type Site, since that license type already exists in the system.

- c Enter a description for the license type. For example, you would enter Example site license that includes all software from a manufacturer being used by a specific site.

By default, the status is set to Draft.
- d For Groupable, select No.

- e For License Type Mode, select Basic.

NOTE

After a license type is created, it has to be enabled. This example shows you how in a later step.

Figure B-2 shows what the Create License Type page should look like.

Figure B-2: Create License Type page filled in for the example

BMC REMEDY IT SERVICE MANAGEMENT - Asset Management [Help](#)

Create License Type

License Type Information

Company - Global -

License Type Site Example [Manage Locales](#)

Description Example site license that includes all software from a manufacturer being used by a specific site

Status Draft

Groupable No

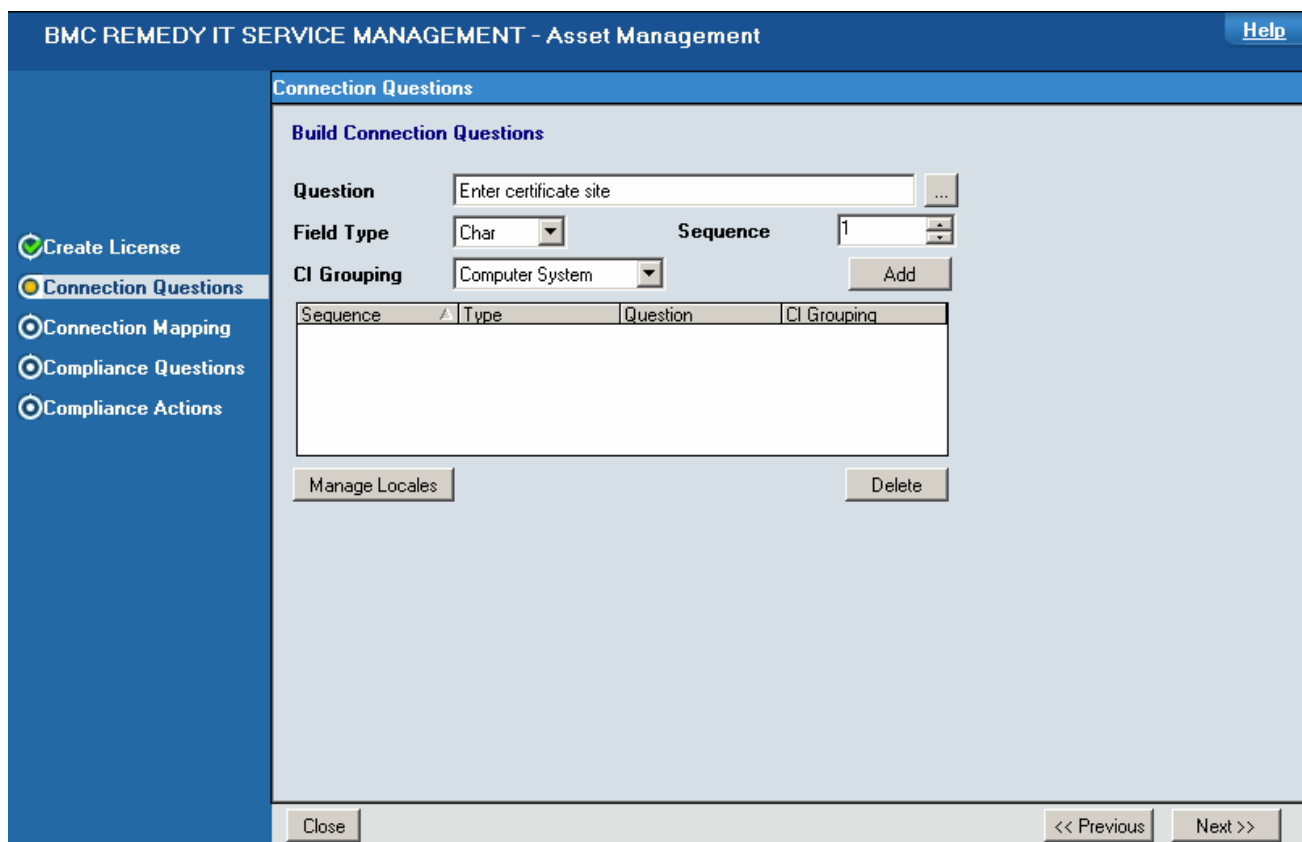
License Type Mode Basic

[Close](#) [<< Previous](#) [Next >>](#)

- 5 Click Next.
- 6 Update the Connection Questions page as follows:
 - a For Question, enter text that prompts for the product name. For example, you would enter Enter certificate site.
 - b For the field type, select Char.
 - c For the CI Grouping, select Computer System.
Computer System is selected instead of Software because computer systems, and not CIs, are usually updated with Site, since there are typically fewer of them.
 - d Click the Sequence up arrow to make the sequence 1.

Figure B-3 shows what the Connection Questions page should look like with the information filled in.

Figure B-3: Connection question added in the example



- a Click Add.
The connection question is added to the list.
- 7 Click Next.
- 8 Update the Map Connection Attributes page of the license type wizard as follows:
 - a For the CI Type, select Computer System.
 - b For the Attribute, you would select the database name. For example, you would select Site.

Since the question requests the site name be entered, this mapping needs to be made so the system can return the list of computer systems that have a site name that matches the site name entered (in answer to the connection question created earlier) when the certificate is created. The next sections in this example show you how to build the compliance questions and actions that are used to determine compliance.
 - c Click Map Attribute.

The mapping is added as shown in Figure B-4.

Figure B-4: Map Connection Attributes page with CI Type and Attribute specified

BMC REMEDY IT SERVICE MANAGEMENT - Asset Management [Help](#)

Map Connection Attributes

Build Connection Mapping

Type	Question	CI Grouping
Char	Enter the site for w	Computer System

CI Type ▼

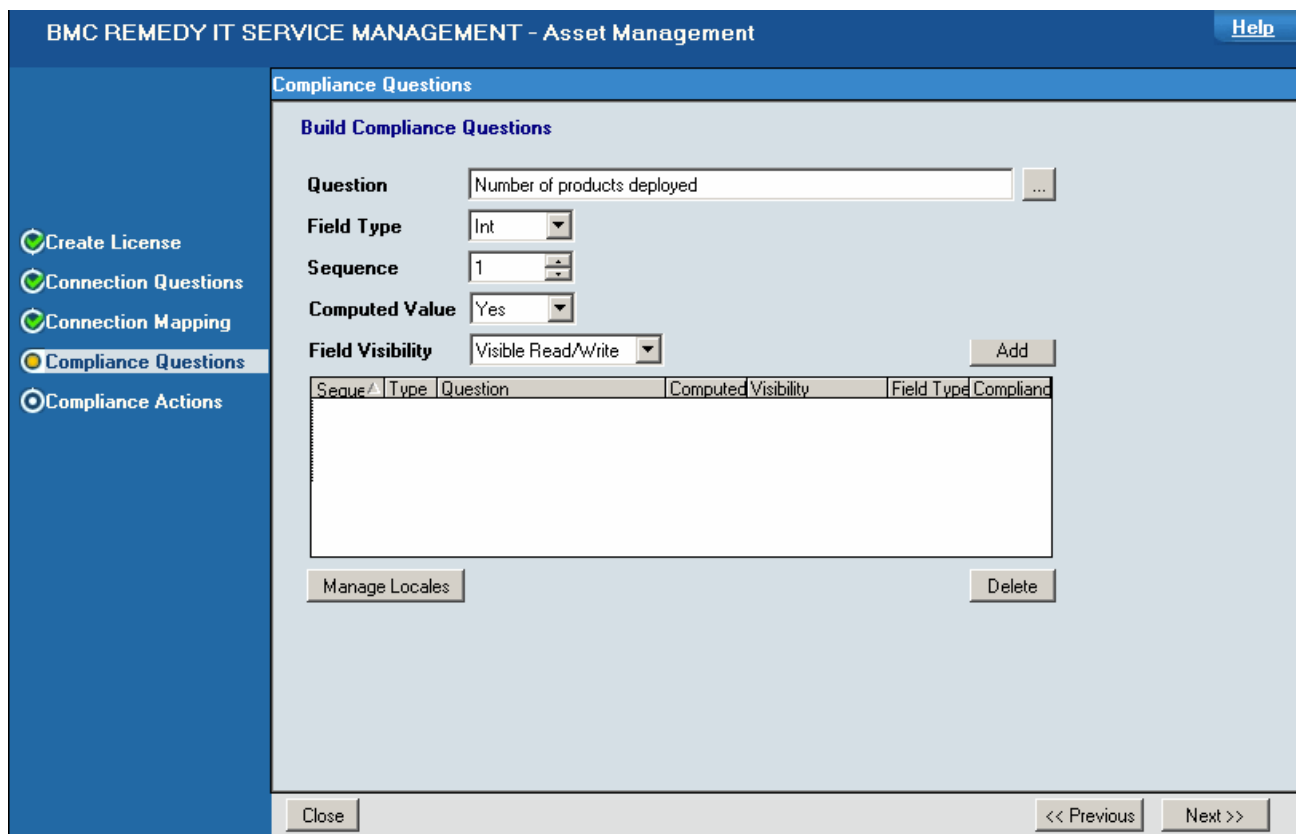
Attribute ▼

Question	Source	CI Grouping	Class	Attribute
----------	--------	-------------	-------	-----------

- 9 Click Next.
- 10 On the Compliance Questions page that appears, build the first compliance question as follows:
 - a Enter the question. For this example, you would enter Number of products deployed.
 - b For Field Type, select Int.
 - c For Sequence, select 1.
This indicates the sequence in which the question is asked when the license certificate is created.
 - d Since this compliance question is updated later by an update action, select Yes for Computed Value.
 - e For the Field Visibility, select Visible Read/Write.
Since this field is being update by a value entered when the license certificate is created, the field visibility needs to be set to read / write access.

Figure B-5 shows how the Compliance Questions page should look like.

Figure B-5: Build Compliance Questions page filled out



f Click Add.

The question is added to the list.

11 Click Next.

In the next section of the example, you will be shown how to create the actions that work with the compliance question to determine whether or not the list of certificates retrieved by the connection question and its mapping are compliant.

12 On the Compliance Actions page of the create license wizard, select Get in the Action field and then click Create.

The Get Action dialog box is displayed.

13 Build the Get action:

a Enter the name of the Get action. For this example, you would use Get deployed products, because this action is retrieving the number of deployed licenses from the list of certificates returned by the connection question and mapping configured earlier.

b Select AR as the source from which to retrieve the information.

- c In the Target field, enter the form name from which to retrieve the information. In this example we are need to retrieve the information from CTR:Contract_Relationship, which holds all connection information stored for processed connection questions.

TIP

You configure a license type with the conditions that will be present at the time the license certificate is created. The form CTR:Contract_Relationships will be populated with the information that this Get action needs at that time.

- d For this license type we want to count the number of deployed licenses so select Count as the type.
- e From the Rule list, select GetCertificates > instanceId, as shown in Figure B-6, to start the rule count to retrieve the number of license certificates.

Figure B-6: Get Action dialog box filled in and with WHERE qualifier being built

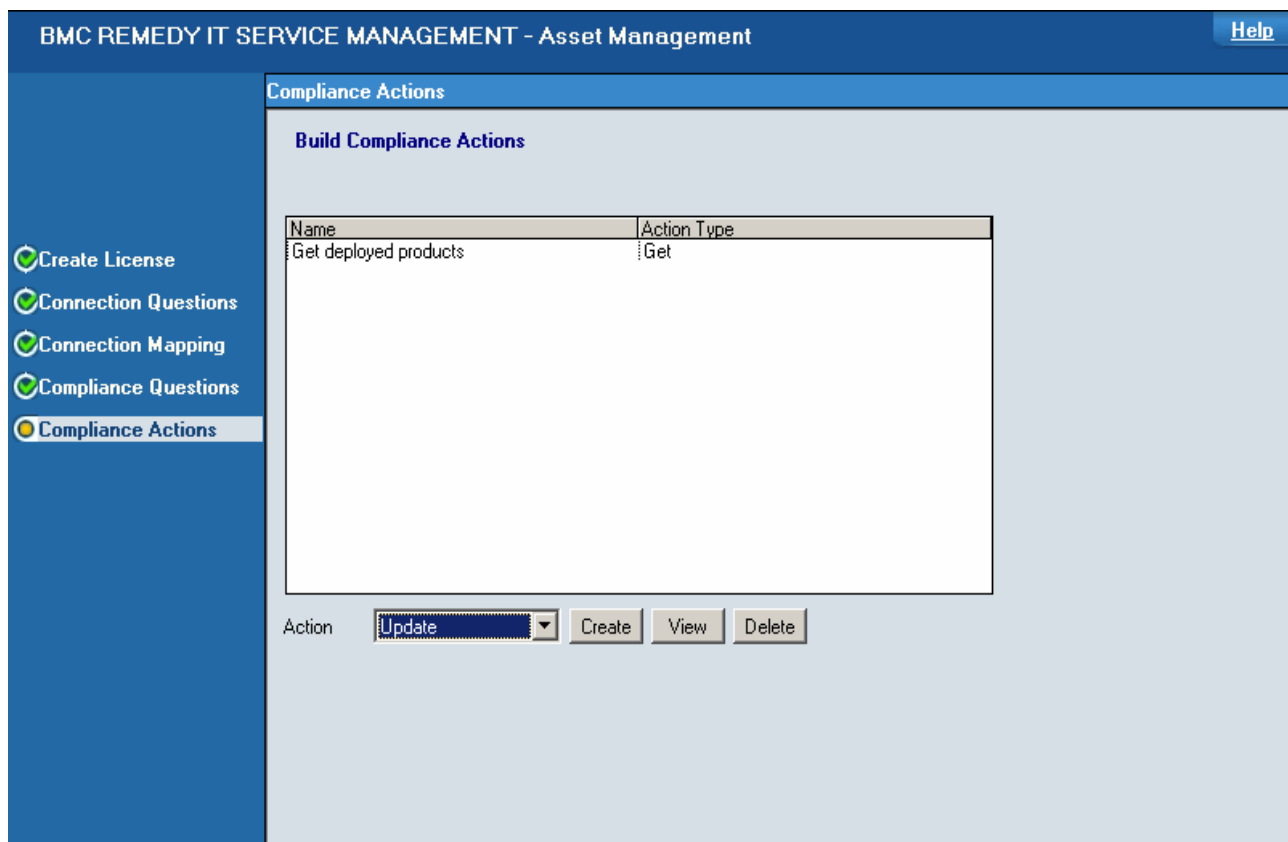
- f From the Operator list, select =.
- g From the Value list, select Child Instance ID*.
- h The WHERE field now contains GetCertificates.instanceId = 'Child_Instance_ID' as shown in Figure B-7.

Figure B-7: WHERE field updated with built WHERE qualifier

- i Click Save.

The Compliance Actions page of the license wizard is redisplayed and the Get action appears in the list as shown in Figure B-8.

Figure B-8: Compliance Actions page showing the Get action created



In order to display the results of the Get action and set the compliance flag, you must build an update action.

- 14 From the Action list, select Update and click Create.
- 15 Build the update action as follows:
 - a Enter the name. For this example, you would enter Update Compliance.
 - b For the Source select Compliance Question.
 - c From the Set list, select Number of products deployed. This value indicates that the question field should be updated based on the count retrieved in the Get.
 - d In the Set Value From field, select Rule.

- e From the Value list, select Get Questions > Number of products deployed as shown in Figure B-9.

Figure B-9: GetQuestions>Number of products deployed

- f Click Add.
- 16 Create a second update action in which you set the compliance flag to return a true or false to indicate whether the licenses are compliant. Leave the Update dialog box open and complete the rest of the steps.

TIP

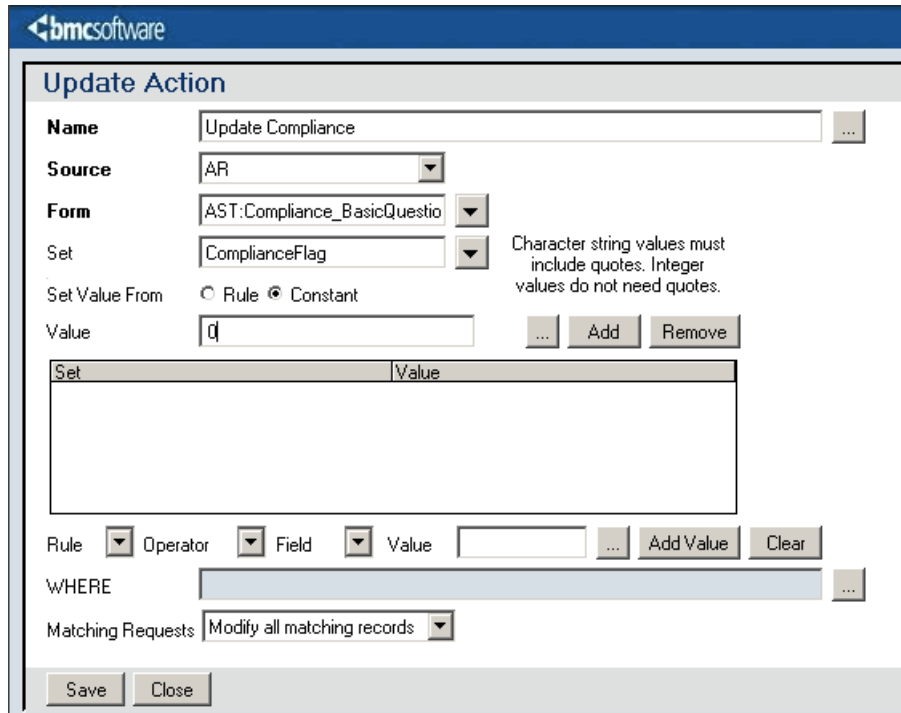
For the Site default license type, if a site licenses exists, it is compliant because all of the license certificates fall under the site license. That means the compliance flag can be set to 1, indicating true for compliance.

- a For the Source select AR.
- b From the Set list, select ComplianceFlag. This value indicates that the question field should be updated based on the count retrieved in the Get.
- c In the Set Value From field, select Constant.
- d In the Value field, enter 1.

The compliance flag is set to 1 because this is the true setting and the site license is compliant.

The Update Action dialog box should appear as shown in Figure B-10.

Figure B-10: Selections to set compliance flag value



e Click Add.

Both update actions appear in the list.

17 Now build the WHERE qualifier for the update action.

a In the Matching Requests list, select Modify all matching records.

b From the Rule list, select GetCertificates > instanceId.

This is added to the WHERE field as the clause starts to be built.

c From the Operator drop-down, select =.

d From the Value list, select Certificate_InstanceId.

The WHERE qualifier should look like Figure B-11.

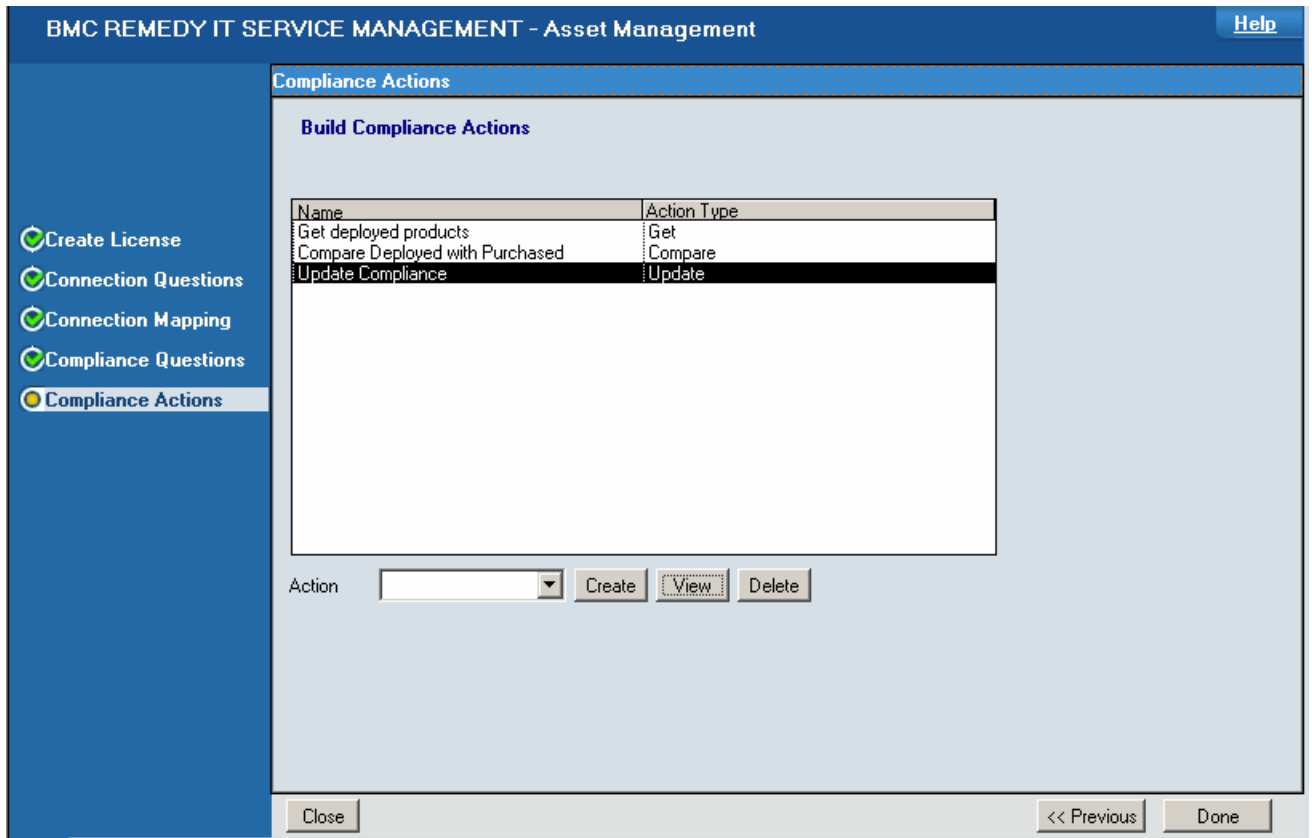
Figure B-11: WHERE qualifier built



18 Click Save.

The Compliance Actions page of the license wizard is redisplayed and all of the compliance actions appear in the list as shown in Figure B-12.

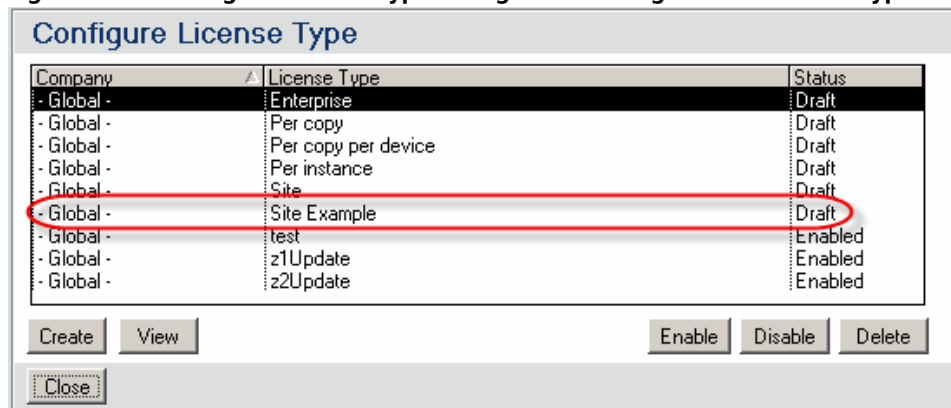
Figure B-12: Compliance Actions page showing all of the actions created



- 19 Click Done.
- 20 At the prompt, click Yes to create the license type.

The license type is created and displayed in the list in the Configure License Type dialog box, as shown in Figure B-13.

Figure B-13: Configure License Type dialog box showing the new license type



By default the license type is created in draft mode.

- 21 To enable the license type, select it and click Enable.
- 22 Click Close.

Per instance license type example—basic mode

This section provides an example to show you how to create a custom license type in basic mode based on the default Per instance license type. For more information about default license types, see “Default system license types” on page 418.

► To create the site example license type in basic mode

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Configure License Type, and then click Open.

The Configure License Type dialog box appears as shown in “Configure License Type dialog box” on page 498.

- 3 Click Create.

The license type wizard starts.

- 4 Update the Create License Type page as follows.
 - a Select Global as the company. This makes the license type available to all companies.
 - b Enter a name for the license type. For example, you would enter Per instance example.

NOTE

Ensure that you do not name this license type Per instance, since that license type already exists in the system.

- c Enter a description for the license type. For example, you would enter Example per instance license that includes all instances of a software application.

By default, the status is set to Draft.

- d For Groupable, select Yes.
 - e For License Type Mode, select Basic.

NOTE

After a license type is created, it has to be enabled. This example shows you how in a later step.

Figure B-14 shows what the Create License Type page should look like.

Figure B-14: Create License Type page filled in for the example

The screenshot displays the 'Create License Type' page in the BMC Remedy IT Service Management - Asset Management interface. The page title is 'Create License Type' and it includes a 'Help' link in the top right corner. The main content area is titled 'License Type Information' and contains the following fields:

- Company:** A dropdown menu with 'Global' selected.
- License Type:** A text input field containing 'Per instance example', with a 'Manage Locales' button to its right.
- Description:** A text input field containing 'Example per instance license that includes all instances of a software application'.
- Status:** A dropdown menu with 'Draft' selected.
- Groupable:** A dropdown menu with 'Yes' selected.
- License Type Mode:** A dropdown menu with 'Basic' selected.

The left sidebar contains a navigation menu with the following items:

- Create License:** Selected (indicated by a yellow dot).
- Connection Questions**
- Connection Mapping**
- Compliance Questions**
- Compliance Actions**

At the bottom of the page, there are three buttons: 'Close', '<< Previous', and 'Next >>'.

5 Click Next.

The Build Connection Questions page of the license type wizard appears. For this license type, the entire set of CIs are used so no connection questions are necessary to filter the set.

6 Click Next to bypass the Build Connection Questions page.

The Connection Mapping page is also bypassed and the Build Compliance Questions page appears.

7 On the Compliance Questions page that appears, build the first compliance question as follows:

a Enter the question. For this example, you would enter Number of licenses purchased.

b For Field Type, select Int.

Since this is also a groupable license type, the Integer Field Type field appears.

c For Sequence, select 1.

This indicates the sequence in which the question is asked when the license certificate is created.

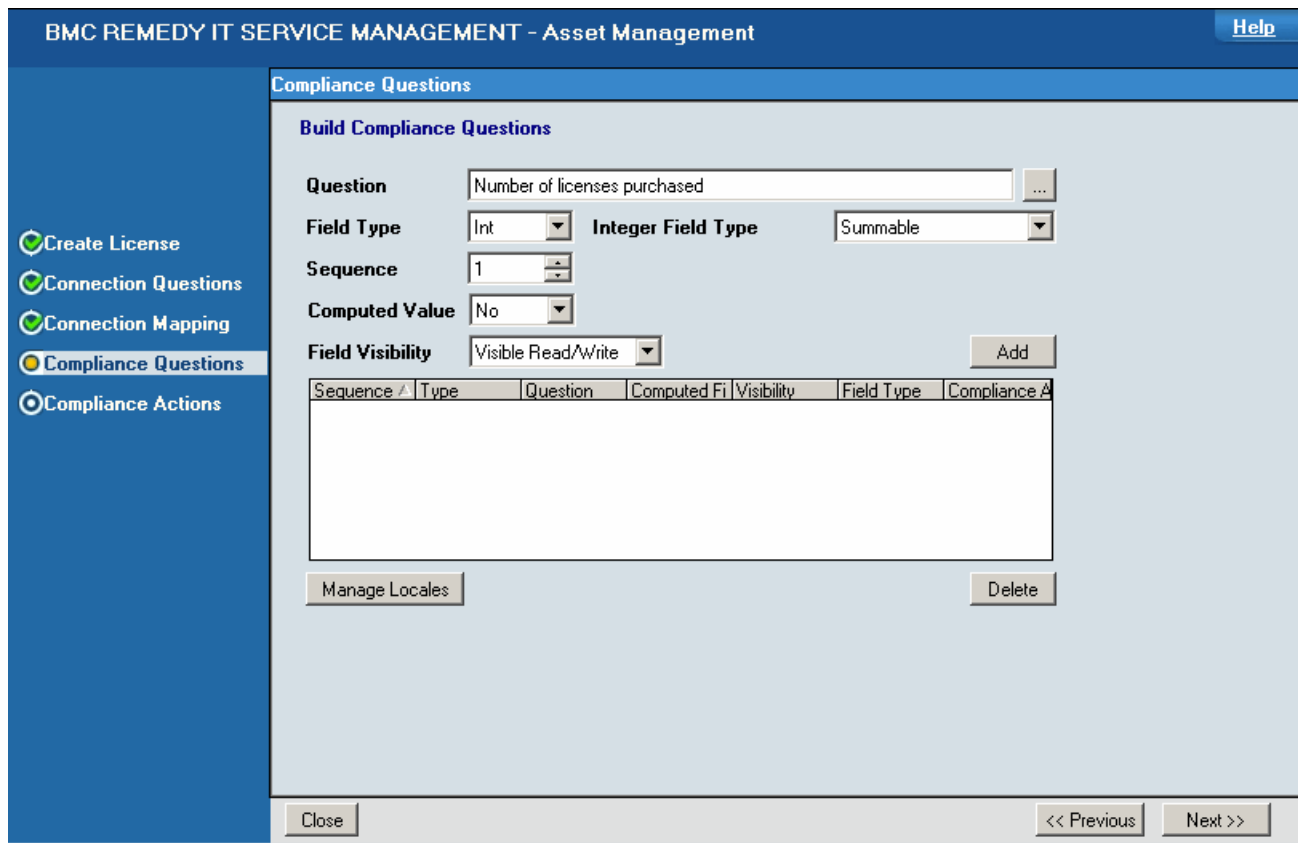
- d Since this is a value that cannot be computed, select No for Computed Value.
- e For the Field Visibility, select Visible Read/Write.

Since this field is being update by a value entered when the license certificate is created, the field visibility needs to be set to read / write access.

- f For the Integer Field Type field, select Summable.

Figure B-15 shows how the Compliance Questions page should look.

Figure B-15: Build Compliance Questions page filled out



- g Click Add.

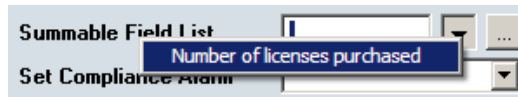
The first question is added to the list.

- 8 On the Compliance Questions page that appears, build the second compliance question as follows:

- a Enter the question. For this example, you would enter Number of licenses deployed.
- b For Field Type, select Int.
Since this is also a groupable license type, the Integer Field Type field appears.
- c For Sequence, select 2.

This indicates the sequence in which the question is asked when the license certificate is created.

- d Since this is a value that must be derived, select **Yes** for **Computed Value**.
- e For the **Field Visibility**, select **Visible Read Only**.
Since this field is being computed, the field visibility needs to be set to read only access.
- f For the **Integer Field Type** field, select **Distributable**.
The **Summable Field List** and **Set Compliance Alarm** fields appear.
- g From the **Summable Field List** list, select **Number of licenses purchased** as shown in Figure B-16.

Figure B-16: Summable Field List selection

- h From the **Set Compliance Alarm** list, select **Yes**.
If the calculation for this field is not compliant, the alarm has to be set to go off.
 - i Click **Add**.
The second question is added to the list.
- 9 On the **Compliance Questions** page that appears, build the third compliance question as follows:
- a Enter the question. For this example, you would enter **Breach warning level 1**.
 - b For **Field Type**, select **Int**.
Since this is also a groupable license type, the **Integer Field Type** field appears.
 - c For **Sequence**, select **3**.
This indicates the sequence in which the question is asked when the license certificate is created.
 - d Since this is a value that cannot be computed, select **No** for **Computed Value**.
 - e For the **Field Visibility**, select **Visible Read/Write**.
Since this field is being update by a value entered when the license certificate is created, the field visibility needs to be set to read / write access.
 - f For the **Integer Field Type** field, select **Summable**.
 - g Click **Add**.
The third question is added to the list.
- 10 On the **Compliance Questions** page that appears, build the fourth compliance question as follows:
- a Enter the question. For this example, you would enter **Breach warning level 2**.

- b For Field Type, select Int.
Since this is also a groupable license type, the Integer Field Type field appears.
- c For Sequence, select 4.
This indicates the sequence in which the question is asked when the license certificate is created.
- d Since this is a value that cannot be computed, select No for Computed Value.
- e For the Field Visibility, select Visible Read/Write.
Since this field is being update by a value entered when the license certificate is created, the field visibility needs to be set to read / write access.
- f For the Integer Field Type field, select Summable.
- g Click Add.
The fourth question is added to the list. The list of questions should appear as shown in Figure B-17.

Figure B-17: Four compliance questions added for per instance example

Compliance Questions

Build Compliance Questions

Question:

Field Type:

Sequence:

Computed Value:

Field Visibility:

Sequence	Type	Question	Computed	Visibility	Field Type	Compliant
1	Int	Number of licenses purchase	No	Visible Read/Writ	Summabl	
2	Int	Number of licenses deployed	Yes	Visible Read Only	Distribu	Yes
3	Int	Breach warning level 1	No	Visible Read/Writ	Summabl	
4	Int	Breach warning level 2	No	Visible Read/Writ	Summabl	

11 Click Next.

In the next section of the example, you will be shown how to create the actions that work with the compliance questions to determine whether or not the list of certificates retrieved by the default connection behavior are compliant. For more about default license type behavior, see “Default behavior for customized license types” on page 418.

12 On the Compliance Actions page of the create license wizard, select Get in the Action field and then click Create.

The Get Action dialog box is displayed.

13 Build the Get action:

- a Enter the name of the Get action. For this example, you would use `Get number of licenses deployed`, because this action is retrieving the number of deployed licenses from the list of certificates returned by the default connection behavior (since no connection questions and mappings were configured for this example).
- b Select AR as the source from which to retrieve the information.
- c In the Target field, enter the form name from which to retrieve the information. In this example we are need to retrieve the information from `CTR:Contract_Relationship`, which holds all connection information stored for processed connection questions.

TIP

You configure a license type with the conditions that will be present at the time the license certificate is created. The form `CTR:Contract_Relationship` will be populated with the information that this Get action needs at that time.

- d For this license type we want to count the number of deployed licenses so select `Count` as the type.
- e From the Rule list, select `GetCertificates > instanceId`, as shown in Figure B-6, to start the rule count to retrieve the number of license certificates.
- f From the Operator list, select `=`.
- g From the Value list, select `Child Instance ID*`.
- h The WHERE field now contains `GetCertificates.instanceId = 'Child_Instance_ID'` as shown in Figure B-18.

Figure B-18: WHERE field updated with built WHERE qualifier

The screenshot shows a configuration interface for a WHERE clause. It consists of four dropdown menus: 'Rule', 'Operator', 'Field', and 'Value'. The 'Rule' dropdown is set to 'GetCertificates', the 'Operator' to '=', and the 'Field' to 'instanceId'. The 'Value' dropdown is set to 'Child_Instance_ID*'. To the right of the 'Value' dropdown are three buttons: '...', 'Add Value', and 'Clear'. Below these elements is a text input field containing the text 'WHERE GetCertificates.instanceId = 'Child_Instance_ID'' followed by a '...' button.

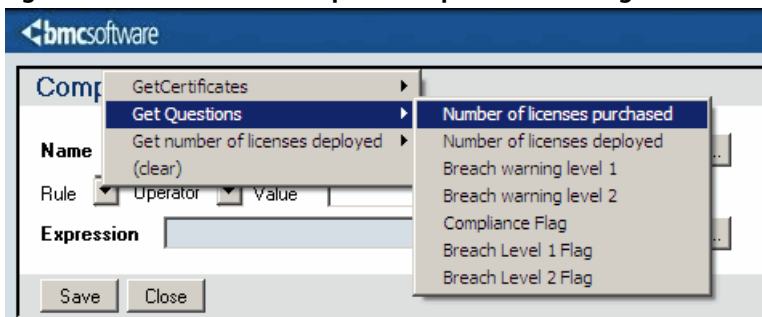
- i Click Save.

The Compliance Actions page of the license wizard is redisplayed and the Get action appears in the list.

The next steps create the compare action to determine if the number of deployed licenses is compliant based on the number purchased.

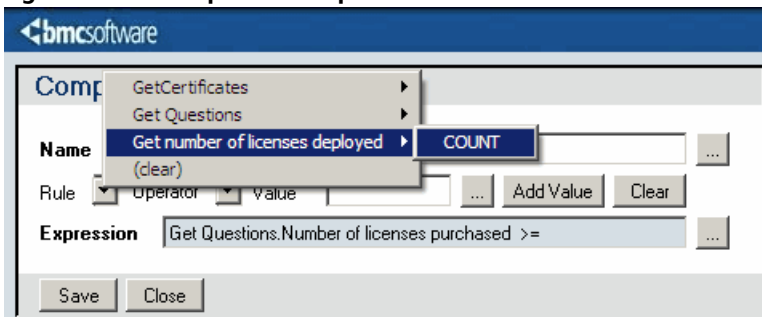
- 14 From the Action list, select Compare and click Create.
- 15 Build the action that will compare the number of licenses deployed with the number purchased, as follows:
 - a Enter the name. For this example, you would enter Check if compliant.
 - b From the Rule list, select Get Questions > Number of licenses purchased as shown in Figure B-19.

Figure B-19: Get number of products purchased being selected to build compare



- c From the Operator list, select the >= sign.
- d From the Rule drop-down, select Get number of licenses deployed > COUNT as shown in Figure B-20.

Figure B-20: Completed compare



The completed expression should look like:

Get Questions.Number of licenses purchased >= Get number of licenses deployed.COUNT

- e Click Save.

The next set of steps calculate how many licenses are left based on the number purchased and the number deployed.

- 16 From the Action list, select Calculate and click Create.

- 17 Build the calculate action as follows:
 - a Enter the name. For this example, you would enter `Check licenses left`.
 - b From the Rule list, select `Get Questions > Number of licenses purchased` as shown in Figure B-19.
 - c From the Operator list, select the `- (minus)` sign.
 - d From the Rule drop-down, select `Get number of licenses deployed > COUNT`.

The completed expression should look like:

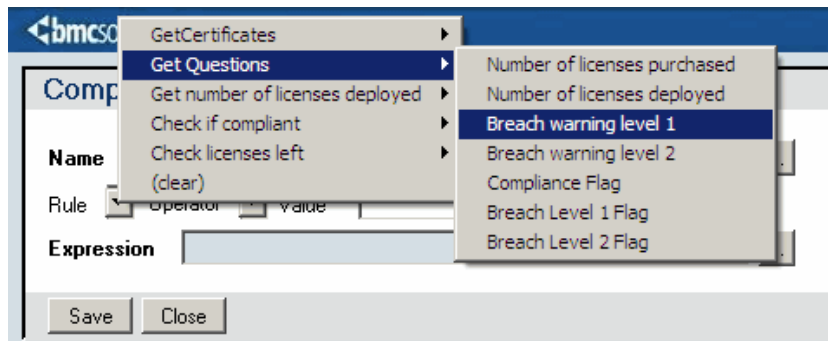
```
Get Questions.Number of licenses purchased - Get number of
licenses deployed.COUNT
```

- e Click Save.

Next, two breach warning flags are configured as compare actions to warn an operator when licenses are approaching non-compliance.

- 18 From the Action list, select Compare and click Create.
- 19 Build the compare action to set breach warning 1, as follows:
 - a Enter the name. For this example, you would enter `Check if approaching breach warning level 1`.
 - b From the Rule list, select `Get Questions > Breach warning level 1` as shown in Figure B-21.

Figure B-21: Get Questions>Breach warning level 1 being selected



- c From the Operator list, select `>=`.
- d From the Rule list, select `Check licenses left > RESULT`.

The completed expression should look like:

```
Get Questions.Breach warning level 1 >= Check licenses
left.RESULT
```

- 20 Build the compare action to set breach warning 2, as follows:
 - a Enter the name. For this example, you would enter `Check if approaching breach warning level 2`.

- b From the Rule list, select Get Questions > Breach warning level 2.
- c From the Operator list, select >=.
- d From the Rule list, select Check licenses left > RESULT.

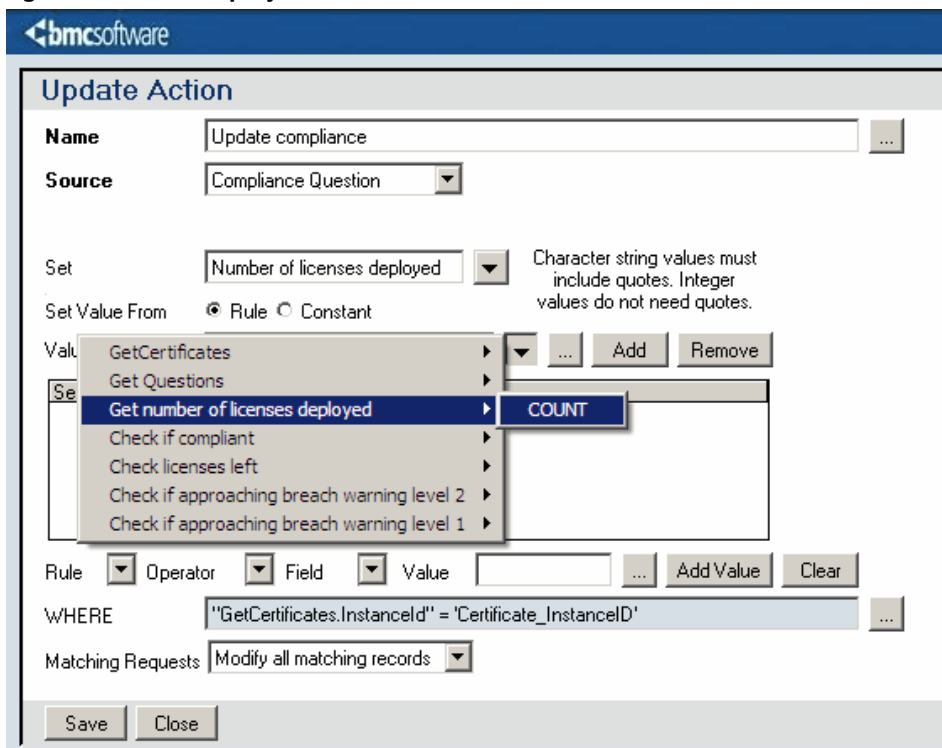
The completed expression should look like:

```
Get Questions.Breach warning level 2 >= Check licenses left.RESULT
```

In order to display the results of the Get action and set the breach level and compliance flags, you must build an update action.

- 21 From the Action list, select Update and click Create.
- 22 Build the update action as follows:
 - a Enter the name. For this example, you would enter Update compliance.
 - b For the Source select Compliance Question.
 - c From the Set list, select Number of products deployed. This value indicates that the question field should be updated based on the count retrieved in the Get.
 - d In the Set Value From field, select Rule.
 - e From the Value list, select Get number of licenses deployed > COUNT as shown in Figure B-22.

Figure B-22: GetDeployed>COUNT selected for Value



- f Click Add.

- 23 Create a second update action in which you set the compliance flag to return a true or false to indicate whether the licenses are compliant. Leave the Update dialog box open and complete the rest of the steps.
 - a For the Source select Compliance Question.
 - b From the Set list, select ComplianceFlag.
 - c In the Set Value From field, select Rule.
 - d In the Value field, select Check if compliant > RESULT.

This value indicates that the compliance flag should be set based on the result from the Check if compliant compare configured earlier.
 - e Click Add.

Both update actions appear in the list.
- 24 Create a third update action in which you set the breach level 1 flag. Leave the Update dialog box open and complete the rest of the steps.
 - a For the Source select Compliance Question.
 - b From the Set list, select Breach Level 1 Flag.
 - c In the Set Value From field, select Rule.
 - d In the Value field, select Check licenses left > RESULT.

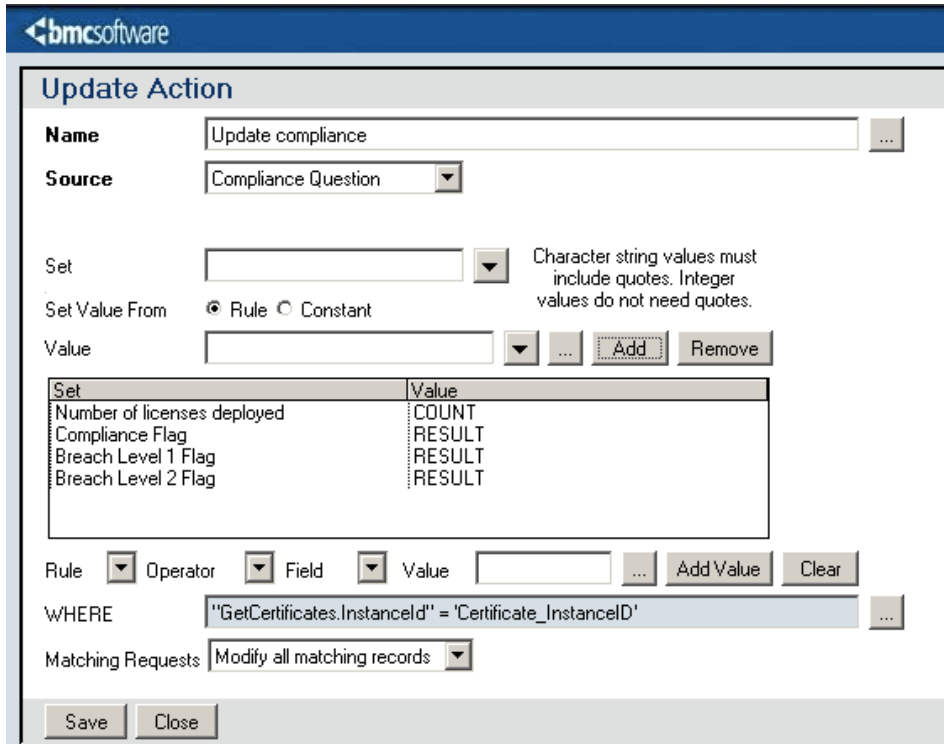
This value indicates that the Breach level 1 flag should be set based on the result of the Check licenses left calculate configured earlier.
 - e Click Add.

Three update actions appear in the list.
- 25 Create a fourth update action in which you set the breach level 2 flag. Leave the Update dialog box open and complete the rest of the steps.
 - a For the Source select Compliance Question.
 - b From the Set list, select Breach Level 2 Flag.
 - c In the Set Value From field, select Rule.
 - d In the Value field, select Check licenses left > RESULT.

This value indicates that the Breach level 2 flag should be set based on the result of the Check licenses left calculate configured earlier.
 - e Click Add.

Four update actions should appear in the list as shown in Figure B-23.

Figure B-23: Update actions created for per instance example



Since Compliance Question was selected for Source, the following default WHERE qualifier is supplied:

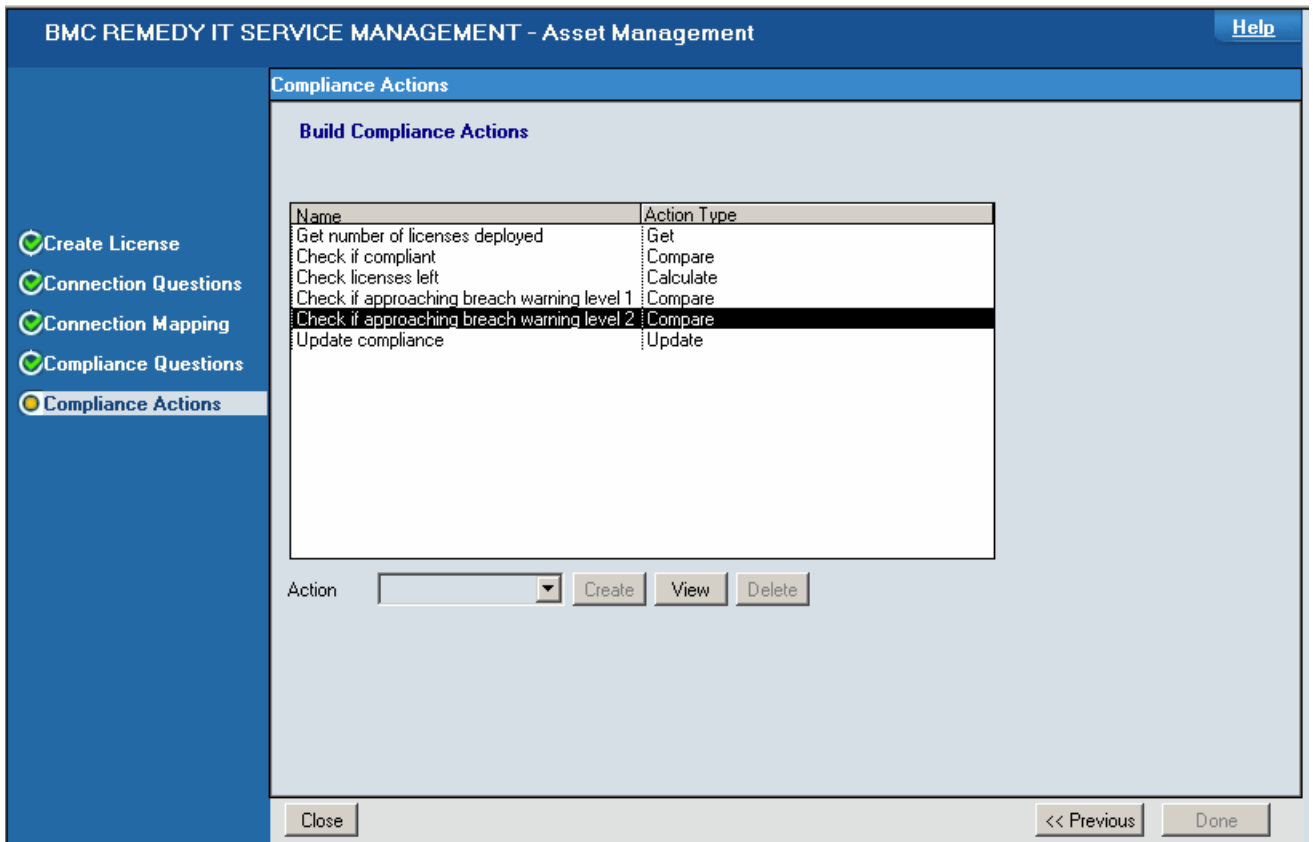
`"GetCertificates.InstanceId" = 'Certificate_InstanceID'`

For this example, this WHERE qualifier is sufficient and does not need to be modified.

- 26 Click Save.

The Compliance Actions page of the license wizard is redisplayed and all of the compliance actions appear in the list as shown in Figure B-24.

Figure B-24: Compliance Actions page showing all of the actions created

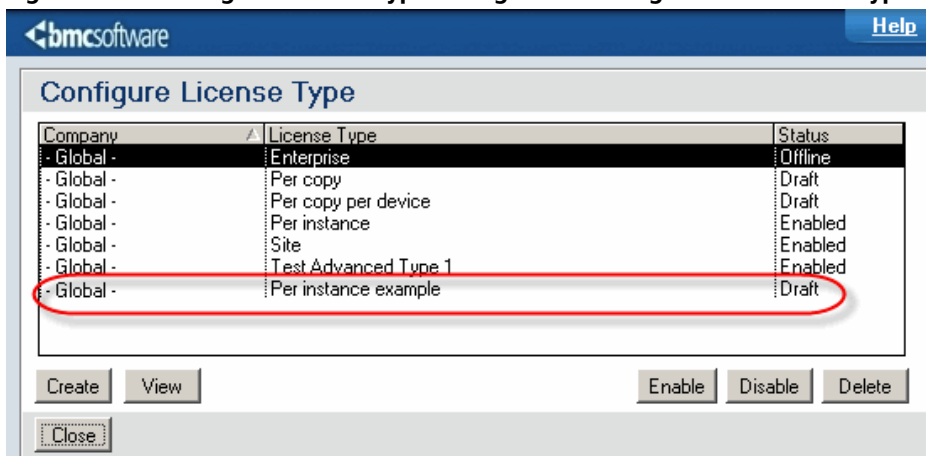


27 Click Done.

28 At the prompt, click Yes to create the license type.

The license type is created and displayed in the list in the Configure License Type dialog box, as shown in Figure B-25.

Figure B-25: Configure License Type dialog box showing the new license type



By default the license type is created in draft mode.

- 29 To enable the license type, select it and click Enable.
- 30 Click Close.

BMC Remedy AR System fixed and floating license type example—advanced mode

The BMC Remedy AR System fixed and floating default license type is an example of a license type created in advanced mode. To understand more about how advanced license types are created, you can view the different parts of this license type.

► To view the BMC Remedy AR System fixed and floating license type

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Asset Management > Advanced Options > Configure License Type, and then click Open.

The Configure License Type dialog box appears.

- 3 Select the BMC Remedy AR System fixed and floating default license type and click View.

The license type is displayed in the license type wizard.

- 4 Click Next to view the different parts of the license type.

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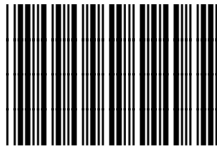
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