Contacting BMC Software

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United States and Canada

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

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Telephone  (01) 713 918 8800

Fax  (01) 713 918 8000

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

Support by telephone or email

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

Before contacting BMC Software

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

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

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

- Sequence of events leading to the problem

- Commands and options that you used

- Messages received (and the time and date that you received them)
  - Product error messages
  - Messages from the operating system, such as file system full
  - Messages from related software
License key and password information

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

- E-mail customer_support@bmc.com. (In the Subject line, enter SupID:<yourSupportContractID>, such as SupID:12345.)
- In the United States and Canada, call 800 537 1813. Outside the United States and Canada, contact your local support center for assistance.
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Preface

This guide provides a conceptual overview of the applications that make up the BMC Remedy IT Service Management (BMC Remedy ITSM) Suite of applications. The BMC Remedy ITSM Suite includes:

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

The applications run on the BMC Remedy Action Request System (AR System) platform and share a common database. All five applications consume data from the BMC Atrium Configuration Management Database (CMDB) application.

Audience

This guide is intended for anyone who wants to obtain a high-level understanding of the BMC Remedy ITSM applications, including IT leaders and BMC Remedy ITSM application administrators.

New icon

This guide contains the New icon, which identifies information that is new or substantially changed with version 7.5.00.

Compatibility information

BMC recommends that you check the websites of the suppliers of the platforms in use at your site to verify that they are still supported. BMC does not support platforms that are no longer supported by the vendor. Carefully read the system requirements for your particular operating system, especially the necessary patch requirements.
Before installing BMC Remedy ITSM applications, review the compatibility matrix on the Customer Support website to make sure that your system is compatible with the applications that you are installing.

To access the compatibility matrix
2. Click the Support Login link, and then log in.
3. Click the Product Availability & Compatibility link.
4. On the Product Availability and Compatibility page, click the BMC Remedy Product Compatibility link.
5. Review the product compatibility matrixes for the products that you are installing.

Internationalization and localization

BMC Remedy ITSM is built on AR System, which is a fully internationalized environment. This environment includes internal support for different character sets and a full suite of features that enable administrators to produce localized applications. In addition, there is support for a locale model where users can specify their language and formatting preferences to have the application delivered in the style that is the most useful to them. This includes being able to deliver to different users, simultaneously, the same application in multiple languages with different formatting.

NOTE
Information in this guide about localization applies only if your version of the application has been localized.

Data language and display language

If all your users work and communicate using a single language, then the data language and display language that they use are the same. However, if you have users in different locations using the same server (for example, users in England, France, and Germany), then you must pick a common data language in which the users will enter and search for data. Typically, this data language is the most common across all your user locales.

You can choose only one data language for each application installation, and this is selected during application installation. This requirement guarantees that users in France can find requests created in Germany or England because they are working with data in their common language.
Documentation

This section lists the documentation available for BMC Remedy ITSM. It also lists relevant documents for related solutions and products and describes how to search PDF documents for strings of text.

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

Table 1-1: BMC Remedy ITSM documentation

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<tr>
<th>Title</th>
<th>Document provides</th>
<th>Audience</th>
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<tbody>
<tr>
<td><strong>BMC Remedy Asset Management 7.5.00</strong></td>
<td></td>
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</tr>
<tr>
<td>BMC Remedy Asset Management User’s Guide</td>
<td>Procedures for using the BMC Remedy Asset Management application; includes new features and overview.</td>
<td>Everyone</td>
</tr>
<tr>
<td><strong>BMC Remedy Change Management 7.5.00</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMC Remedy Change Management User’s Guide</td>
<td>Procedures for using the BMC Remedy Change Management application; includes new features and overview.</td>
<td>Everyone</td>
</tr>
<tr>
<td>BMC Remedy Task Management System Administrator’s Guide</td>
<td>Procedures to configure the Task Management system module. This guide also includes steps to configure seamless authentication between BMC Remedy Change Management and the other components of the BMC Change and Configuration Management solution.</td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Remedy Service Desk 7.5.00</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>BMC Remedy ITSM 7.5.00 (shared documents)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMC Remedy ITSM Configuration Quick Start</td>
<td>A reference card to quickly install and configure applications in the BMC Remedy ITSM Suite.</td>
<td>Administrators</td>
</tr>
<tr>
<td>BMC Remedy IT Service Management Configuration Guide</td>
<td>Procedures for configuring the BMC Remedy IT Service Management applications.</td>
<td>Administrators</td>
</tr>
<tr>
<td>BMC Remedy IT Service Management Data Management Administrator’s Guide</td>
<td>Procedures for using the Data Management tool that is part of BMC Remedy ITSM Suite.</td>
<td>Administrators</td>
</tr>
<tr>
<td>BMC Remedy IT Service Management Guide to Multi-Tenancy</td>
<td>Scenarios for implementing multi-tenancy. It also describes how multi-tenancy is implemented in the BMC Atrium CMDB product and how that implementation relates to multi-tenancy as implemented in the BMC Remedy ITSM applications.</td>
<td>Everyone</td>
</tr>
<tr>
<td>Title</td>
<td>Document provides</td>
<td>Audience</td>
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</tr>
<tr>
<td><strong>BMC Remedy IT Service Management Release Notes</strong></td>
<td>Information about known issues in each release of BMC Remedy IT Service Management. Also provides a list of new features included with the applications.</td>
<td>Everyone</td>
</tr>
<tr>
<td><strong>Help</strong></td>
<td>Help for using and configuring BMC Remedy ITSM, available by clicking Help in the product interface. Available from help links after help is installed.</td>
<td>Everyone</td>
</tr>
<tr>
<td><strong>BMC Atrium Core 7.5.00</strong></td>
<td></td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Atrium CMDB Administrator's Guide</strong></td>
<td>Information about configuring the BMC Atrium CMDB application to manage data about your IT environment.</td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Atrium Core Installation Guide</strong></td>
<td>Information about installing and configuring BMC Atrium Core features, including BMC Atrium CMDB, BMC Atrium Integration Engine, Product Catalog, and BMC Atrium Impact Simulator.</td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Atrium CMDB User's Guide</strong></td>
<td>Information about using BMC Atrium CMDB, including searching for and comparing CIs and relationships, relating CIs, viewing history, and launching federated data.</td>
<td>Users</td>
</tr>
<tr>
<td><strong>BMC Atrium CMDB Common Data Model Diagram</strong></td>
<td>Hierarchical diagram of all classes in the Common Data Model (CDM), including unique attributes and applicable relationships.</td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Atrium Core Concepts and Planning Guide</strong></td>
<td>Information about BMC Atrium CMDB concepts and best practices for planning your BMC Atrium CMDB implementation.</td>
<td>Executives and administrators</td>
</tr>
<tr>
<td><strong>BMC Atrium CMDB Normalization and Reconciliation Guide</strong></td>
<td>Information about normalizing data in BMC Atrium CMDB and reconciling CIs from different data providers into a single production dataset.</td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Atrium Core Developer’s Reference Guide</strong></td>
<td>Information about creating API programs using C and web services API functions and data structures.</td>
<td>Administrators and developers</td>
</tr>
<tr>
<td><strong>BMC Atrium Discovery and Dependency Mapping 7.5.00</strong></td>
<td>Information about configuring a connection to BMC Atrium CMDB, synchronizing discovery data, and reconciling and maintaining the data.</td>
<td>Administrator</td>
</tr>
<tr>
<td><strong>BMC Configuration Automation for Clients 7.5.00</strong></td>
<td>Instructions about planning, installing, and configuring the Configuration Discovery integration. This guide also includes information about relationship classes and mappings, data exchanges, and reconciliation definitions.</td>
<td>Administrator</td>
</tr>
</tbody>
</table>
## Table 1-1: BMC Remedy ITSM documentation (Continued)

<table>
<thead>
<tr>
<th>Title</th>
<th>Document provides</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BMC Remedy Action Request System 7.5.00</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMC Remedy Action Request System Configuration Guide</td>
<td>Procedures about configuring AR System servers and clients, localizing, importing and exporting data, and archiving data.</td>
<td>Administrators</td>
</tr>
<tr>
<td>BMC Remedy Action Request System: BMC Remedy Approval Server Guide</td>
<td>Topics on installation and configuration of the Approval Server, how to use the Approval Server, and understanding the approval workflow.</td>
<td>Everyone</td>
</tr>
<tr>
<td>BMC Remedy Action Request System Database Reference</td>
<td>Contains information about overseeing the interaction between the AR System and specific databases. It also contains information about changing the structure of AR System forms.</td>
<td>Administrators</td>
</tr>
<tr>
<td>BMC Remedy Action Request System Form and Application Objects guide</td>
<td>Description of components necessary to build applications in BMC Remedy AR System, including applications, fields, forms, and views.</td>
<td>Developers</td>
</tr>
<tr>
<td>BMC Remedy Action Request System Integration Guide</td>
<td>Contains information about creating, customizing, and maintaining integrations between AR System and external systems.</td>
<td>Administrators and developers</td>
</tr>
<tr>
<td>BMC Remedy Action Request System Workflow Objects</td>
<td>Contains information and procedures for creating, modifying, and maintaining AR System workflow objects, including active links, filters, and escalations.</td>
<td>Administrators and developers</td>
</tr>
<tr>
<td>BMC Remedy Email Engine Guide</td>
<td>Contains information about installing and maintaining the BMC Remedy Email Engine.</td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Remedy Knowledge Management 7.x</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMC Remedy Knowledge Management User’s Guide</td>
<td>Describes how to access BMC Remedy Knowledge Management from both the web interface and the AR System interface. It also describes how to author solutions, search for solutions, and manage solutions in the workflow.</td>
<td>Everyone</td>
</tr>
<tr>
<td><strong>BMC Service Level Management 7.x</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMC Service Level Management Installation Guide</td>
<td>Procedures for installing the BMC Service Level Management application.</td>
<td>Administrators</td>
</tr>
<tr>
<td>BMC Service Level Management User’s Guide</td>
<td>Procedures for using the BMC Service Level Management application; includes new features and overview.</td>
<td>Everyone</td>
</tr>
<tr>
<td>BMC Service Level Management Configuration Guide</td>
<td>Procedures for configuring the BMC Service Level Management application.</td>
<td>Administrators</td>
</tr>
<tr>
<td><strong>BMC Service Request Management 2.2.00</strong></td>
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</tbody>
</table>
Searching PDF documents

If you have Adobe Acrobat version 6.0 or later, you can search for text within all of the PDFs that are in the same folder. You do not need to open the files before running your search.

To upgrade your version of Adobe Acrobat, go to www.adobe.com.

To search PDF documents in a specific location

1. Copy the BMC Remedy ITSM PDF files to a folder.
2. Open Adobe Acrobat.
3. Choose Edit > Search.
4. In the Search PDF pane, type the word or phrase to search for.
5. Select the All PDF Documents in option and browse to the folder containing the PDF files for BMC Remedy ITSM.
6. Click Search.
7. In the Results window, click a document to open it to the first occurrence of the search term in the document.
8. To navigate to other occurrences of the search term within the document, click a link under the document name. To navigate to occurrences in other documents, click the plus (+) symbol to the left of a document name.
This section provides an overview of the core applications included in the BMC Remedy IT Service Management Suite.

The following topics are provided:

- Introducing BMC Remedy ITSM (page 16)
- BMC Remedy Asset Management (page 33)
- BMC Remedy Change Management (page 39)
- BMC Remedy Service Desk (page 46)
- Installing and configuring BMC Remedy ITSM applications (page 52)
- Customizing the BMC Remedy ITSM applications (page 52)
Introducing BMC Remedy ITSM

The BMC Remedy IT Service Management product portfolio streamlines the processes around IT service desk, asset management, and change management operations. It also enables you to link your business services to your IT infrastructure to help you manage the impact of technology changes on business and business changes on technology—in real time and into the future. In addition, you can understand and optimize the user experience, balance current and future infrastructure investments, and view potential impact on the business using a real-time service model. All this helps you manage what matters to deliver Business Service Management (BSM).

Each BMC Remedy ITSM application contains the consoles, forms, active links, escalations, flashboards, and so on, needed to execute their basic functions. The applications also use several integrated modules and supporting applications that extend and enhance these basic functions.

For an overview of the individual modules and the supporting applications, see “Understanding BMC Remedy ITSM Modules” on page 55.

The applications, modules, and foundation data in BMC Remedy ITSM include:

Applications
- BMC Remedy Asset Management
- BMC Remedy Change Management
- BMC Remedy Service Desk
  - BMC Remedy Incident Management
  - BMC Remedy Problem Management

Modules
- Command Automation Interface (CAI)
- Contract Management
- Cost Module
- License Engine
- Requester console
- Task Management System (TMS)

Foundation data
- Company
- People
- Location
- Categorizations
NOTE
For more information about modules and foundation data, see “Understanding BMC Remedy ITSM Modules” on page 55.

Features and benefits

With the BMC Remedy IT Service Management applications, you can:

Align business and IT

- Translate business objectives into IT services by facilitating a dialog to define what the business needs, and get agreement on the specific services and service levels that IT will deliver to address those needs.
- Manage assets to optimize business value by making sure your assets are supporting business-critical IT services, according to agreed-upon service levels.
- Increase the responsiveness of IT organizations to the business by providing dynamic service views and service models showing how a single event can affect crucial business services.
- Based on business needs and priorities, integrate with Service Level Management (BMC SLM) to proactively manage service levels for mission critical services delivered by IT operations through real-time management of service level agreements.
- Integrate real-time IT and business impact information, including route cause data, into incident tickets for improved user value.

Provide visibility into your infrastructure

- Rapidly discover what physical and logical elements (servers, routers, switches, databases, gateways, web servers, application servers) and dependencies that comprise an application infrastructure.
- Quickly discover which underlying IT resources are causing business service slow downs or outages.
- Manage IT and service information at an enterprise scale with secure distributed roles and responsibilities.
- Enable the identification of chronic bottlenecks and service-impacting problems and workflow processes.
- Provide real-time event consolidation, processing, and integration with existing tools and help desks, and notification for consolidated control across the entire IT computing enterprise.
Enhance customer satisfaction

- Facilitate the creation and maintenance of a service model not only by discovering the components and relationships of enterprise application infrastructures, but also by watching for changes and proposing updates to the service models accordingly.
- Enable staff with interactive notification, escalation, and resolution capabilities using remote devices to make sure IT and business issues are addressed quickly and efficiently.
- Show how the IT assets and staff resources perform against contracted service levels.
- Define, measure, and manage the quality of service experienced by a group of users.

BMC Remedy ITSM architecture

The database forms the underlying element of the BMC Remedy ITSM architecture. On top of the database is the BMC AR System server (AR System server). AR System server processes all data entered by BMC Remedy ITSM applications. In addition, the AR System server is the workflow engine between the BMC Remedy ITSM applications and the database. It also verifies that a user has permission to perform each action, thereby enforcing any access control defined in the applications.

In this capacity, the AR System server is the interface between the database and the BMC Atrium Core, which includes the Product Catalog and the BMC Atrium CMDB. The BMC Atrium CMDB stores information about the configuration items (CIs) in your IT environment and the relationships between them. The BMC Atrium CMDB makes this information available to the BMC Remedy ITSM applications and their various shared application components, such as the TMS.

The BMC AR System server also manages the BMC Remedy Approval Server and the BMC Remedy Assignment Engine:
- BMC Remedy Approval Server is a self-contained, shared module that enables you to automate any approval or signature process. For more information about BMC Remedy Approval Server, see the BMC Remedy Approval Server Guide.
- The BMC Remedy Assignment Engine enables you to automatically assign requests to individuals. For more information about BMC Remedy Assignment Engine, see the BMC Remedy Action Request System Configuration Guide.

The relationships among the database, AR System server, BMC Atrium Core, shared application components, and the BMC Remedy ITSM applications are illustrated in Figure 1-1.

The relationships among the database, AR System server, Approval Server, Assignment Engine, and the BMC Remedy ITSM applications are illustrated in Figure 1-2.
Figure 1-1: BMC Remedy ITSM architecture

Figure 1-2: BMC Remedy ITSM relationships
The BMC Remedy ITSM Suite is designed with this 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.

In a typical data flow, users initiate the process using the included Requester console or the BMC Service Request Management application. The Requester console enables users to register a request for service without needing to know if the fulfillment mechanism for that request is an incident or a change request. Depending on what a user asks for, the Requester console routes the request to the incident management process or the change management process.

If the customer registers an incident request, it might trigger a later problem investigation. If that problem investigation is resolved with a known error, the known error triggers a change request. The known error can also be published in the Knowledge Management module, which then becomes available to help resolve future, similar incident requests.

If the customer registers a change request, this causes the BMC Atrium CMDB to be updated. Updating the BMC Atrium CMDB ensures that the BMC Remedy Asset Management application has up-to-date information about CIs and their relationships with other CIs.

The BMC Service Level Management application monitors the service level agreements (SLAs) defined in the BMC Remedy Incident Management and the BMC Remedy Change Management applications and notifies the appropriate managers if any of the SLAs are in danger of being breached.

This data flow is illustrated in Figure 1-3.
Conceptual organization

The overall organization of the BMC Remedy ITSM Suite has three layers:

- Modules
- Applications
- Supporting subsystems

The top layer consists of modules that provide the interface to users, such as the Requester console. The Requester console interacts with a back-office application, such as BMC Remedy Incident Management or BMC Remedy Change Management.

Applications are the main BMC Remedy ITSM applications: BMC Remedy Incident Management, BMC Remedy Change Management, BMC Remedy Problem Management, and BMC Remedy Asset Management. These applications contain logic and user interfaces specific to those application areas.
The final layer consists of supporting subsystems. This common set of subsystems supports the applications. Supporting subsystems contain generic logic that is specific to an application’s function without embedding functionality from other applications that use its services.

Examples of subsystems include TMS, Cost Module, and Contract Management. Figure 1-4 illustrates the relationships among the BMC Remedy ITSM applications and modules.

**Figure 1-4: BMC Remedy ITSM applications and modules**

<table>
<thead>
<tr>
<th>Applications and modules</th>
<th>Modules and supporting subsystems</th>
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<tbody>
<tr>
<td><strong>Change Management</strong></td>
<td><strong>ITSM Foundation</strong></td>
</tr>
<tr>
<td>BMC Atrium Core</td>
<td>Location</td>
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<td></td>
<td>Organization</td>
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<td></td>
<td>People</td>
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<td>Support Groups</td>
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<td>Categorizations</td>
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<td>Notification Engine</td>
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<td><strong>Task Management</strong></td>
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<td></td>
<td>CAI</td>
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<td></td>
<td>ITSM Foundation</td>
</tr>
<tr>
<td></td>
<td><strong>Cost Module</strong></td>
</tr>
<tr>
<td></td>
<td>ITSM Foundation</td>
</tr>
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Deployable application structure model

The BMC Remedy AR System platform provides the structural component used in the BMC Remedy ITSM applications to define the deployable application architectural structure.

Deployable applications provide functions that support a component architectural model. These functions are covered in following sections:

- Licensing enforcement
- Encapsulation of permissions
- Definition of entry points
- Ability to import and export as a whole component

Deployable applications are used to wrap each of the different applications and modules that are provided in BMC Remedy ITSM applications.

Deployable applications contain the following applications and modules:

Applications

- BMC Remedy Incident Management (licensed)
- BMC Remedy Problem Management (licensed)
- BMC Remedy Change Management (licensed)
- BMC Remedy Asset Management (licensed)

Modules

- Cost Module (licensed)
- TMS
- BMC Remedy Change Management Dashboards (licensed)
- Application Administration Console
- Reporting Console
- Requester console

Helper

- Foundation elements
- Foundation components, such as message boxes and so on
- Site
- Company
- BMC Atrium Product Catalog
Licensing model

The licensing model includes application-level licenses and user-level licenses. All licenses in the BMC Remedy ITSM Suite of applications are enabled by the deployable application model.

Application-level licenses

Application licenses provide access to the forms that make up an application. If an application-level license is not applied to BMC Remedy AR System, the forms are not accessible using user clients. This makes user licensing a requirement for importing data into the BMC Remedy ITSM applications.

Application-level licenses are enabled for the main applications provided in the BMC Remedy ITSM Suite. In addition, application-level licenses are required for the BMC Remedy Change Management Dashboard and the Cost Modules.

User-level licenses

BMC Remedy ITSM supports Fixed and Floating licensing models for users of the licensed applications. The BMC Remedy ITSM Suite supports a model that requires a license (in addition to any required permissions) to modify records in an application. There are no license requirements for submitting data into the system; however, there are permission requirements.

Fixed licensing is a named license that is assigned to a particular user.

Floating licensing is a pool of licenses that is assigned to a set of users. Users take up tokens when they log in to an application, and hold on to those tokens while they are working with the forms in that application. Tokens are released when a user logs off or a system timeout is reached.

Permission model

Main concepts that support permissions include:

- Abstraction using roles
- Common roles
  - Viewer
  - Submitter
  - User
  - Master
  - Administrator
- Predefined permission groups to support the roles
- User access using support groups
- Functional roles
Abstractions using roles

Roles are provided by the BMC Remedy AR System deployable application model. Roles are defined within the context of a deployable application. Forms and client-side workflow in a deployable application have roles defined for permissions, instead of physical permission groups that users are assigned to.

Permissions are enabled for a user by mapping the physical permission groups that are provided with the BMC Remedy ITSM applications to the roles that the permission groups need to belong to. By doing this the underlying applications and modules can change and control their permission models without affecting how other applications integrate with them. This also enables applications outside of the BMC Remedy ITSM Suite to integrate with BMC Remedy ITSM applications and modules. Customers can also build their own sets of permissions groups to map into the applications and modules.

Common roles

To simplify and provide commonality among the applications, each application and module provides a common set of roles. The application or module can extend these roles for other specific purposes as needed.

The common roles are:

- **Viewer**—Provides the ability to view data in an application or module, but not to modify data.
- **Submitter**—Provides the ability to complete and submit forms, but not view data.
- **User**—Provides the ability to modify data, based on support group access.
- **Master**—Provides the ability to modify any record, regardless of support group.
- **Administrator**—Provides the ability to configure the application or module.

Predefined permission groups

To support this model, the BMC Remedy ITSM applications provide predefined explicit permission groups that map to roles for each of the applications and modules.

Also, as shipped, these permission groups are also mapped to the appropriate roles that are needed from the underlying modules. For example, all roles that require costing data access are mapped to the Financial User role. This predefined configuration makes it simpler to configure permissions in the application, while still providing the underlying control.

BMC Remedy AR System computed groups are used to enable an easy mapping mechanism. Computed groups enable you to define which groups make up the definition of a group. For example, the following computed group is used to define including all users for each application in the Cost User role.

**NOTE**

Cost User is automatically granted and is not visible in BMC Remedy ITSM.
**User access using support groups**

Support groups play a primary role in the BMC Remedy ITSM permission model. If a user is a member of a user role, the definition of what records that user can modify is based on whether a record has been assigned to one of the user’s support groups. For example, if a user is in the Incident User role and is a member of the Hardware support group, the user can modify only incident requests that are assigned to the Hardware support group. The user can view other incident requests but cannot modify those incident requests.

**Functional roles**

Functional roles are not permission groups, but they are enforced by workflow. For example, the Manager or Approver role within a support group provides additional privileges within the BMC Remedy ITSM application functions. Based on your support group, you can have different functional roles. For example, in the Hardware support group, someone can be defined as a manager, but in the Software support group that person might be just a member.

**Multi-tenancy model**

Multi-tenancy defines who has access to what data on a row-level basis. For example, in a service provider environment a single application might be used by multiple companies, with the data for each company hidden from other companies using that application.

In BMC Remedy ITSM, multi-tenancy is defined using companies. Companies are defined as operating companies and vendor companies, and users are associated with these companies to define their access rights. A user is associated with a company through the People form.

A user can manage multiple companies by adding more companies to the Access Restrictions list. If a user needs to manage all companies, access can be set to Unrestricted.

**Implementation of multi-tenancy**

The services provided by the BMC Remedy AR System platform are primary to the implementation of multi-tenancy. BMC Remedy AR System enables you to control access to data based on permission groups, and to determine if those permission groups have access to individual rows of data.

BMC Remedy ITSM writes company IDs to a special field (field ID 112). Each data record contains this field, which is normally hidden. For example, when you select the contact and classification companies on the Incident form, workflow updates field 112 values with the company IDs of the customer company and contact company. For child records, such as the tasks or costs associated with an incident, the tenancy information is passed down from the parent.
While field 112 is populated based on the customer and contact companies of a record, field 60900 is populated based on the company of the staff assigned to a ticket. This special field is populated on application forms based on the company that is assigned to that record. For example, on the Incident form, when you assign the incident to a company, workflow updates field 60900 values with the group ID of the assigned company. For child records, such as the tasks or costs associated with an incident, field 60900 is passed down from the parent.

After field 112 and field 60900 are populated, any query to BMC Remedy AR System shows only rows of data that a user has permission to see, based on their own permissions and the permissions in field 112 and field 60900.

For more information about multi-tenancy see the BMC Remedy IT Service Management Guide to Multi-Tenancy.

**Integration model**

One of the main design requirements for the BMC Remedy ITSM Suite is that all applications and modules must provide defined interfaces for integration purposes. These interfaces abstract the applications that integrate with the applications and modules.

The common model for interface forms is to use display-only forms to manage the creation of records and relationships, and to use join forms to manage queries and modify actions.

BMC strongly recommends that all integrations with BMC Remedy Incident Management, BMC Remedy Problem Management, BMC Remedy Change Management, TMS, and Cost Module go through the provided interface forms. This abstracts any future integration from underlying changes to those applications and modules.

In addition to the interface forms, web services are provided for most of the applications. The web services interfaces are a layer on top of the interface forms, and provide basic define, modify, and query capability to the applications and modules.

For more information about using interface forms and web services, see BMC Remedy IT Service Management Integrations white paper.

**Work Info model**

Work logs are components that track work history. They replace the work diary fields used in versions of the BMC Remedy ITSM applications earlier than version 7.0.

Each Work Info entry is stored as a separate record in a BMC Remedy AR System form. This approach enables easy reporting and searching of the Work Info entries associated with any particular record.
Each Work Info entry can contain up to three different attachments. The attachments can be associated with the work notes, which results in the attachments being tied to the record. This provides context to the attachments and makes it easy to find them. It also enables unlimited attachments to be associated with any particular record.

The work log system also enables record locking, making records public or hidden, and categorizing the records.

Each application uses a separate work log form, but these separate forms use the same structure and workflow. This off loads the processing of Work Info records to forms that are specific to each application.

## Console structures

Consoles are the main user interface to the BMC Remedy ITSM applications. Two types of consoles are provided: application consoles that provide application-specific functionality, and common consoles that are used across applications.

The common consoles include an overview console that combines assigned work from all applications into one view, and a Requester console that is focused on the users.

### Application consoles

The BMC Remedy ITSM Change Management console has two views: one focused on the support technician, and one on the manager. In addition, the BMC Remedy Change Management console also provides the ability to change the support console to focus the work on tasks or change requests.

The BMC Remedy Service Desk applications use an integrated console that is intended for use by service desk analysts and managers.

The BMC Remedy Asset Management application uses four consoles:

- Asset Management
- Purchasing
- Software Asset Management (SAM)
- Receiving

For more information about the consoles, refer to the application specific user guides.

### Overview console

The Overview console provides a view of work assigned across multiple applications. For example, if users want to see all incidents, problems, and tasks assigned to them, they can view them in the overview console.
This implementation uses a BMC Remedy AR System ARDBC plug-in to provide a consolidated view of all assigned work from data sources in multiple applications without using replication of data or complex SQL views that bypass APIs.

The plug-in architecture is data-driven. Configuration forms define how the plug-in is set, including which forms to query, which fields to map to the table field, and an ARDBC form that performs the query.

**Requester console**

Requester console users are typically employees who need assistance from the IT support staff to implement a change or resolve an incident.

However, the user might not be an employee. Non-employees can also be users because non-registered users can also submit service requests.

Traditionally, after a user made a telephone call to a central help desk, a support staff member logged the request. BMC Remedy Incident Management and BMC Remedy Change Management provide user self-provisioning. Using the Requester console, users can submit, track, and (in some cases) resolve their own requests. BMC Remedy Change Management and BMC Remedy ITSM are preconfigured to work with the Requester console. However, an organization can decide to make the Requester console unavailable.

The Requester console is the primary interface for users to define and view their requests. From the Requester console, you can define a request that is submitted to BMC Remedy Change Management or BMC Remedy ITSM. You can also view requests and respond to a survey after the request has been resolved.

**Foundation design**

The Foundation contains the common forms, workflow, and data that are needed to support the applications. It also provides a repository for the following data structures used by each BMC Remedy ITSM application:

- Company (tenancy definition and external company definition)
- Organization
- Location
- People
- Support groups
- Categorization
Company

Company is a primary data structure in the foundation. This structure has two main purposes: tenancy definition and external company definition.

Tenancy refers to how data and rules are partitioned within the BMC Remedy ITSM applications. For example, a company might have two different business units that use the BMC Remedy Incident Management application. Each business unit has its own definitions of data, categorizations, assignment rules and approval rules, to make sure that this data is not intermixed.

Tenancy enables you to define the partitions between the two business units and enforce the data level permissions for who can access what data. In this example, a company would be defined for each business unit to define partitioning of rules and data.

A primary function of the company data structure in the foundation is to define tenants to be used by the BMC Remedy ITSM applications. This function of company is used to define both how the application will partition the data, and the rules for the application, based on different distinct users of the application.

Business units are one example of partitioning. If you need to partition the data and the rules of the applications, based on individual business units, then you need to define different companies for each business unit.

You can also use the company definition to define other types of companies that are used in the application, such as manufacturers, suppliers, and so on, as defined and used in BMC Remedy Asset Management.

Location

The location structure within the BMC Remedy ITSM applications has a four-tiered data model, where the second and third tiers can be optional (the fourth tier, however, is required). In effect, the data model can be two, three, or four tiers. The Company field makes up the first tier, Region is the second tier, Site Group is the third tier, and Site is the forth tier (where Sites are physical locations with mailing addresses, such as buildings). It is important to note that when creating the location structures, the regions and site groups will be used to group sites within a company. Therefore, it is important to have a list of the sites within a company, and then determine if regions and site groups will be required to arrange the sites in an organized manner that can be used for reporting purposes.

- Sites identify unique physical locations and are associated with one or more companies.
- The Company field and Site field are required on all request forms.
- Workflow can be defined to any level of the Location structure.

Organization

Organization describes the role the company component plays in the foundation.
People

The People structure within the BMC Remedy ITSM applications includes several forms that are primarily accessed through the People form. The main form (or parent form), People, is used to store an individual's contact information, their organization, and location structures information.

Support groups

Support groups are used to define groupings of back-office staff, based on their skills. Support groups are also used as the initial assignment for a incident, problem, change request, or release request.

- The Support structure can differ from the organization structure.
- A support staff member can belong to many support groups.
- Vendor support groups can be defined to support external assignment of requests.
- The Support Group role must be specified for information only; there is no associated workflow.

Categorization

Categorization structures in BMC Remedy ITSM are divided into two distinct components: operational categorization and product categorization.

The operational categorization structure is a three-tier structure that helps you to define the work being done for a particular incident, problem, known error, change request, release request, or task.

This structure is also used to qualify reporting in the system, qualify how groups and support staff get assigned, and routing of approvals.

Product categorization is a three-tier structure that helps you to define a description of the object or service on which you are performing the work, for example: Hardware, Peripheral Device, Monitor.

Notification Engine

The Notification Engine provides a back-end workflow model for defining which notifications should be sent, based on different events in a BMC Remedy ITSM application.

Support staff use the People form to define which notifications they want to receive. Included predefined notifications can be turned on or off.
Assignment

The assignment architecture for the BMC Remedy ITSM Suite is based on a two-phase concept. The first phase is assignment of the support group; the second phase is assigning the support technician using load balancing technology built into the Assignment Engine.

Phase 1: Support groups

The support group assignment phase is done using BMC Remedy AR System workflow on back-end forms, using four different inputs:

- Organization
- Location
- Operational categorization
- Product categorization

The Assignment form also defines the events in which assignment needs to occur. These events are based on the calling applications assignment needs. For example, the BMC Remedy Change Management application requires assignment for the change assignee and the change manager.

Assignment rules are partitioned based on tenancy that has been defined. Each operating company can have its own set of assignment rules.

Phase 2: Individual Assignment

Individual assignment is done using the Assignment Engine. Assignment rules are provided to support Number of Tickets Assigned, Round Robin, and Capacity process rules.

- Number of Tickets Assigned — Assigns the request based on the person who has the lowest number of requests assigned.
- Round Robin — Assigns the request to the next person in line.
- Capacity — Uses a formula of the number of requests assigned and a capacity factor to determine total capacity, and assigns the request to the user with the lowest capacity rating.
The BMC Remedy Asset Management application enables IT professionals to track and manage enterprise configuration items (CIs) and their changing relationships throughout the entire asset lifecycle. BMC Remedy Asset Management tracks contracts, financial costs, software licenses, outage indicators, and more for the CI information stored within the BMC Atrium CMDB application.

As part of the BMC Remedy ITSM Suite, BMC Remedy Asset Management is integrated with BMC Remedy Service Desk (which contains the BMC Remedy Incident Management and BMC Remedy Problem Management applications), BMC Remedy Change Management, and BMC SLM, and offers flexibility to support customized business processes.

BMC Remedy Asset Management provides the following capabilities to help reduce the total cost of ownership of your CIs and increase return on investment:

- **Software license management** — reduces software license overspending and non-compliance through greater accuracy in discovering, tracking, and reallocating software licenses. By automatically linking discovered software configuration items to software license certificates, BMC Remedy Asset Management can report on license compliance and help facilitate license reallocation.

- **Contract management** — tracks the status, type, terms, conditions, payments, and other information about lease, software, warranty, and maintenance contracts.

- **Blackout schedules** — schedules listing available or unavailable times for CIs.

- **Inventory management** — specifies, tracks, and manages individual CIs and bulk items.

- **Configuration management** — defines standard configurations, or setups, for different people or groups within a company, and maintain the status of the CIs within the configurations.

- **Life Cycle IT CI management** — uses best practices workflow to handle all phases of the IT CI management life cycle from requisition, purchase and receipt, to installation and deployment.

- **Cost Module** — consolidates CI costs from procurement to disposition, and allocate and track costs to cost centers.

- **Requisition management** — creates purchase requisitions, manages the approvals of the requisitions, initiates the creation of purchase orders, and manages the receipt of items from suppliers and the creation of the associated CIs.

For more information, see the *BMC Remedy Asset Management User’s Guide*. 

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User interface

The user interface for BMC Remedy Asset Management provides the interfaces for the consoles and forms. BMC Atrium CMDB includes a generic interface for CI data stored in BMC Atrium CMDB. The BMC Remedy Asset Management interface for CI data extends and modifies the generic user interface to be more applicable to the BMC Remedy ITSM Suite. For example, the Outages tab is displayed on applicable CI forms to display the additional fields provided by BMC Remedy Asset Management, and the navigation pane provides links to BMC Remedy ITSM Suite functionality.

The BMC Atrium CMDB interface is provided with all the BMC Remedy ITSM applications. In the absence of the BMC Remedy Asset Management application, this user interface provides a view into the BMC Atrium CMDB so that CIs can be tracked and related to other BMC Remedy ITSM applications. When BMC Remedy Asset Management is installed, the interface is extended to also contain links to specific BMC Remedy Asset Management functionality, such as contracts, depreciation, and procurement.

BMC Remedy Asset Management and the BMC Atrium CMDB

BMC Remedy Asset Management is tightly integrated with the BMC Atrium CMDB as the underlying data model. The BMC Atrium CMDB stores details about the configuration items (and their relationships) that are managed by BMC Remedy Asset Management.

The BMC Atrium CMDB supports the concept of reconciling CIs in a sandbox with the production CIs. This affects the overall structure of how data flows and is related to other data in the BMC Remedy ITSM Suite.

Software license management

The software license feature of BMC Remedy Asset Management is designed to automatically link software CIs with the applicable software license certificates.

The License Engine links the software CIs based on the connection details specified for the software license certificate. Connection actions defined on the license type determine the query to connect the software CIs to the software license certificate.

The License Engine updates compliance data for the software license certificate, based on the compliance detail specified for the software license certificate. Compliance actions specify the rules that calculate compliance. Compliance can be calculated based on the software CIs connected to the software license certificate, the computer system on which the software is installed, CIs related to the computer system (such as CPUs), or any data stored in a BMC Remedy AR System form.
Procurement

BMC Remedy Asset Management contains a procurement process that controls the full process from requisition to order, to receiving and returns.

The procurement process starts with a requisition. Requisitions are requests from users for the items to purchase. Attached to a requisition is a set of line items. These line items define each of the individual items to purchase. The requisition provides the processes for pricing line items correctly and getting the appropriate approvals before orders are sent to vendors.

After the requisition is approved and the line items are priced, the appropriate orders are automatically generated. The orders are generated based on the vendors for each of the line items. One order is generated for each vendor, with the appropriate line items attached.

From a data model perspective, the line items are shared between the requisition and the orders generated from that requisition.

When orders are received, the line items are updated with the received value. After all line items are received the order is considered closed. After the orders generated from a requisition are received, the requisition is considered closed.

Contracts

BMC Remedy Asset Management extends the Contract module to provide detailed contract functionality for Lease, Warranty, Support, Maintenance, and Software License Management.

Standard configurations

Standard configurations define what type of software or hardware a particular group is entitled to. The configurations are stored in the Configuration form. This form has a header component that describes the configuration and a line item component that describes each of the components (hardware or software) that make up this standard configuration.

Standard configurations functionality is integrated with the BMC Remedy Change Management application to facilitate the procurement process. The standard configuration can be compared with what is available in inventory to determine which items are available and which items need to be procured.
Outages

The BMC Remedy Asset Management application provides a data model of storing planned or unplanned outages against a CI. Scheduled outages automatically generate time segments in the BMC Remedy AR System Business Time module. This information is then made available to the change management process and other processes to record when scheduled outages have been made against a particular CI.

The outage model is also where Service Level Targets are integrated into BMC Remedy Asset Management. Information about service targets that have been defined for a particular CI and the status of those service targets appears on the SLM tab.

Schedules

The BMC Remedy Asset Management application provides a model for defining two different types of schedules: Maintenance Schedules and Audit Schedules. The definition of these schedules defines time periods in which maintenance or audits need to be done for a particular CI or set of CIs. The schedules also integrate with the BMC Remedy Change Management application to manage the tasks and scheduling of the required maintenance and audits.

Application and module integration

The following modules and applications are used by BMC Remedy Asset Management:

- Cost Module
- BMC SLM
- BMC Atrium CMDB

Cost Module

BMC Remedy Asset Management uses the Cost Module to track costs associated with CIs.

This integration uses the common cost creation dialog box that is provided by the Cost Module. The fields on CI user interface forms integrate with BMC Remedy Asset Management forms to show cost data related with a CI.

BMC SLM

BMC Remedy Asset Management integrates with the BMC SLM application to provide service level definitions for system availability related service targets associated with a CI.

When BMC SLM is installed, a tab is enabled on the CI Unavailability form, showing service targets and milestones that are associated with a CI.
**BMC Atrium CMDB**

BMC Remedy Asset Management provides views of CIs that focus on the attributes applicable to managing your assets. BMC Remedy Asset Management extends the BMC Atrium CMDB common data model with CI types for Bulk Inventory and for Location. The following fields and tabs on all CI forms are BMC Remedy Asset Management extensions:

- Company field
- Financials tab
- Outage tab
- Impacted Areas tab

**NOTE**

The Financials tab, Outage tab, and Impacted Areas tab are available only if BMC Remedy Asset Management is installed. If BMC Remedy Change Management or BMC Remedy Service Desk is installed without BMC Remedy Asset Management, the asset inventory module provides access to CIs and to the other asset extensions.

Typically, discovery products automatically populate BMC Atrium CMDB. You can manually update CI data from BMC Remedy Asset Management.

**Interfaces**

BMC Remedy Asset Management provides a set of interfaces that can be used to integrate with the BMC Remedy Asset Management application. These interfaces include the BMC Atrium CMDB API, for creating, modifying, and deleting CIs and relationships.

Interfaces to BMC Remedy Asset Management also include interface forms and web services.

For more information, see the *BMC Remedy IT Service Management Integrations* white paper.

**BMC Atrium CMDB permission model**

BMC Remedy AR System groups data in the BMC Atrium CMDB, to make viewing easy, as described in the following list.

- **CMDB Data View (computed group)**
- **CMDB Data Change (computed group)**

The following list contains descriptions of the BMC Remedy AR System roles:

- **CMDB Data View** — On every class attribute with View permissions.
- **CMDB Data Change** — On every class attribute with Change permissions.

The following list contains additional BMC Remedy AR System permissions:
- **Read Security (dynamic group)**—On every class attribute with View permissions.
- **Write Security (dynamic group)**—On every class attribute with Change permissions.
- **Assign Group (field 112)**—On the RequestId with View permissions.

These permissions are mapped to roles that are defined for BMC Remedy Asset Management as a deployable application.

### BMC Remedy Asset Management roles

The following list describes the BMC Remedy Asset Management roles:

- **Asset Viewer**—Read access to CI data in BMC Remedy Asset Management.
- **Asset User**—Read access to CI data in BMC Remedy Asset Management with the ability to modify CI data that has been related to one or more support groups that are associated with the BMC Remedy Asset Management user. Provides access to the Asset Management Console, Contract Management Console, and Software Asset Management Console.
- **Asset Administrator**—Read/write access to CI data in BMC Remedy Asset Management. Provides access to the Asset Management Console, Contract Management Console, and Software Asset Management Console.
- **Asset Config**—Grants access to modify BMC Remedy Asset Management forms to configure the following information: 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; and Unavailability priority.

  This permission does not provide access to purchasing or receiving. It also requires an application fixed or floating license for full modify access.

- **Contract Config**—Has full access to create new contracts and modify them; and to create new contract types.

  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.

- **Contract Viewer**—Read access to contracts in BMC Remedy Asset Management.
- **Contract User**—Read access to contracts in BMC Remedy Asset Management with the ability to modify contracts that have been related to a support group associated with the contract user. Provides access to the Contract Management Console and the Software Asset Management Console.
- **Contract Administrator** — Read/write access to contracts in BMC Remedy Asset Management. Provides access to the Contract Management Console and the Software Asset Management Console.
- **Purchasing User** — Read/write access to purchasing data in BMC Remedy Asset Management. Provides access to the Purchasing Console.
- **Receiving User** — Read/write access to receiving functionality in BMC Remedy Asset Management. Provides access to the Receiving Console.

### Mapping of BMC Remedy Asset Management roles to BMC Atrium CMDB roles

The following list maps BMC Remedy Asset Management roles to BMC Atrium CMDB roles.

- **CMDB Data View** — mapped to Asset Viewer and Asset User
- **CMDB Data Change** — mapped to Asset Admin
- **Write Security** — mapped to support group permissions

### Row-level security

Row-level locking is set at the Company level for all BMC Remedy Asset Management forms. All child records inherit the tenants of the parents associated with them. For individual CI records, the tenancy is set by the value in the Company field on the CI, and by the Used by, and Supported By people and groups associated with the CI.

### BMC Remedy Change Management

Using IT Infrastructure Library® (ITIL®) best practices, BMC Remedy Change Management provides IT organizations with the ability to manage changes by enabling them to assess impact, risk, and resource requirements, create plans and automate approval functions for implementing changes, and facilitate the successful distribution of both software and hardware releases while minimizing any business impact. BMC Remedy Change Management provides scheduling and task assignment functionality, and reporting capabilities for reviewing performance and improving processes. Because BMC Remedy Change Management is integrated with the BMC Atrium CMDB, it enables you to relate changes to other records, such as configuration items (including services) and incidents.
Using BMC Remedy Change Management in combination with these BMC Remedy ITSM applications enables you to assess the scope of the change, analyze the costs associated with the change (in terms of time and expense), perform impact and risk analysis, and schedule the resources needed to complete the change. Using the BMC SLM application enables you to define service targets and measure the efforts of your support staff as they implement the changes.

BMC Remedy Change Management gives you access to the TMS, which is installed and integrated as part of the application set. BMC Remedy Change Management has the following additional features that the TMS module does not have:

- Dependencies between change requests, and a definable sequence with enforcement
- Approval processes for change requests
- Risk and impact analysis
- Cost analysis and management functionality
- Expanded set of predefined reports

For more information, see the *BMC Remedy Change Management User’s Guide*.

### Process flows

ITIL is the foundation for achieving the goals of the BMC Remedy Change Management application. This section illustrates the union between the ITIL process and BMC Remedy Change Management functionality.

The BMC Remedy Change Management process has five primary stages:

- Initiate and record
- Review and authorize
- Plan and schedule
- Implement
- Complete and close

Each stage can consist of sub-processes to support putting the change on hold or getting approval to move to the next stage. These sub-processes can be configured to be applicable at each of the primary stages. The following sections give a brief description of each of the primary stages and the features that support each stage.

For information about configuring the system, see the *BMC Remedy IT Service Management Configuration Guide*. For more details about features that support each stage of the change management process, see the *BMC Remedy Change Management User’s Guide*.

### Initiate and record

Initiate and record is the initial stage of the change management process and focuses on recording the purpose of the change request, and on obtaining the additional information needed to classify and route the request.
The primary sources of change requests are:
- BMC Remedy Problem Management, including the known error feature
- BMC Remedy Incident Management
- Service Request Management

The key features available in BMC Remedy Change Management designed to support this stage of the process include:
- Requester console
- Auto assignment or change requests at the group and individual level
- Support for multi-tier classification using the product and operational catalogs

**Review and authorize**

After the initial request has been submitted, the next logical stage is review and authorize. The purpose of this stage is for the change manager to assess the change request, provide any additional information to add more context, and, if required, initiate the corresponding approval process. This stage acts as the initial filter to determine if the change request should continue to the next stage in the process.

The features in BMC Remedy Change Management designed to support this stage of the process include:
- Manager console
- Risk assessment
- Support for relating CIs from the BMC Atrium CMDB
- Integration with the BMC Remedy Approval Server
- Request acknowledgement setting

**Plan and schedule**

After the change request has been approved for work to begin, the next stage is to plan resources and schedules to ensure minimal impact to the production environment. After the planning and scheduling are complete, the change request is goes through another approval process.

The features available in BMC Remedy Change Management designed to support this stage of the process include:
- Change calendar
- Costing (budgeted)
- Scheduling
- Collision detection
- Integration with the BMC Remedy Approval Server
- Change templates
- Integration with TMS
  - Task templates
  - Task viewer

**Implement**

This stage consists of executing against the plan and accomplishing the work. The features available in BMC Remedy Change Management designed to support this stage of the process include:

- Support console
- Task viewer
- Costing (actual)
- Work info

**Complete and close**

This is the final stage of a change request and indicates either that the change request has been completed successfully, or that it was canceled. All the data elements (time, cost, and so on) are rolled up and recorded.

**Change Calendar**

The Change Calendar is a high-level console for managing change and release activities, intended to be used by enterprise-level CIOs and members of change approval boards. From the calendar, these users can see a holistic picture of changes and releases occurring in the enterprise, as well as associated business activities or events. Some of this information comes from BMC Remedy Change Management and other information comes by referencing objects in the BMC Atrium CMDB. Aided by links to investigative and analysis tools, users will be able to better understand the risk and impact of changes and to plan and make better decisions about changes, considering the interdependencies that are made more visible through the calendar console.

The calendar’s primary view is a calendar-like schedule that shows a focused view of related change requests and release requests, when they are scheduled to begin and end, and related business activities and events.

You can select filtering criteria to limit the change requests, release requests, and business activities to view. By changing these filtering criteria, you can focus on the items of interest. High-risk changes and releases are highlighted. You can drill down from any change request, release request, or business activity to see more detailed information about the item. This view is primarily for change approval board members.
Executive dashboard

The BMC Remedy Change Management Dashboard helps executive users to understand the trends relating to change configuration management, and to take appropriate action to balance the flow. A dashboard view presents a set of metrics or statistics that give a snapshot of the state of the change management process. You have a choice of which statistics to view. You can select criteria that focuses the view on the desired perspective, and you can indicate how far back to view the data. Example statistics are the history of planned and unplanned changes over one or several time ranges, the number of authorized changes over the last week or month, the success rate of changes made for the last thirty days, and a summary of costs of changes over the last fifty changes made. The CIO is the primary user of this dashboard view.

Application and module integration

The following applications and modules are used by BMC Remedy Change Management:

- Requester console module
- Cost Module
- BMC SLM application
- BMC Atrium CMDB application
- Release Management module

Requester console

The Requester console provides the front-end interface for users into the BMC Remedy Change Management application. The integration:

- Generates change requests.
- Updates change information using the work log.
- Includes an interface back from the change to the request that is stored in the Requester console.
- Updates the status of the request to match the status of the change request, and makes Work Info entries visible.

The Requester console interacts with BMC Remedy Change Management using the BMC Remedy Change Management interface forms.

Cost Module

BMC Remedy Change Management uses the Cost Module to track costs associated with change requests and release requests. The integration uses the common cost creation dialog box that is provided by the Cost Module.
BMC SLM

Change management integrates with the BMC SLM application to provide service level definitions for resolution and response time for change requests. When BMC SLM is installed, an SLM status field on the Change form is enabled, showing the service targets and milestones that are associated with a change request or release request.

In addition to the user interface integration, the BMC Remedy Change Management application also ties into the definition structure of BMC SLM. BMC SLM has a plug-in architecture for helping users define terms and conditions, and measurements for a service target. BMC Remedy Change Management provides a user interface for this BMC SLM plug-in architecture to make it simpler for users to build qualifications using a query-by-example (QBE) model.

BMC Atrium CMDB

Change management integrates to the BMC Atrium CMDB using relationship tables. From BMC Remedy Change Management, users can search for CIs and relate CIs to a change.

Release Management

The Release Management module of the BMC Remedy Change Management application helps you build and install controlled releases into your IT environment. Release Management enables you to deploy releases of software into production and establish effective use of the service to deliver value to the customer and hand over to service operations.

The Release Management module has six primary stages:

- Initiate
- Plan
- Build
- Test
- Deploy
- Close Down

Each stage can consist of sub-processes to support putting the change on hold or getting approval to move to the next stage. For more details about features that support each stage of Release Management, see the BMC Remedy Change Management User’s Guide.

Release Management is tightly integrated with the Activity subsystem, which provides the capability to assign specific units of work (“activities”) to support staff but that does require the complexity of a change request.
Interfaces

Interfaces to BMC Remedy Change Management include interface forms and web services. For more information, see the *BMC Remedy IT Service Management Integrations* white paper.

Permission model

BMC Remedy ITSM permissions have two levels: BMC Remedy AR System permission groups, such as Change User, Change Submit, and Change Master, and functional roles. The BMC Remedy AR System permission group is not as relevant for the BMC Remedy ITSM applications because the BMC Remedy ITSM applications use the General Access permission group across fields on the forms. These groups are primarily used to provide functionality that a group can access. For example, Change Submit has less functionality compared to Change User. All functionality based on permissions is implemented through workflow. Functional roles enable the functionality to be further refined within a permission group. Again, this is implemented through workflow.

The following example shows the difference between a person having Change User permission with no functional role compared with having functional roles.

If a user has Change User permission with no role, this person has access to almost everything (including the risk compute button, costing, and the calendar) on the Change form, but has the following restrictions:

- Limited ways to move from one status to the next. This user does not have access to the states between Request for Change to Scheduled and also cannot close the request.
- Cannot reassign the change manager and the change assignee. Can manually reassign the change implementer.
- Cannot modify the effort logs for the change manager and change assignee, but can define and delete the entries for change manager and the change assignee.

If a user has Change User permission with the Change Assignee role, this person has the following restrictions:

- Cannot reassign the change manager. Can manually reassign the change assignee and implementer.
- Cannot modify the effort logs for the change manager, but can define and delete the entries for the change manager.

A user with Change User permission and a Change Manager role has access to all functionality.

A Change Master is someone who has the access of a person with Change User permission and Change Manager functional role across different support groups. A Change Manager can also define approval mappings and change templates for the support groups the Change Manager belongs to.
A person with Change User permission (with or without a functional role) can work only on the change requests that are assigned the support groups person belongs to. A person with Change Master permission can work on any change request that the person can access, whether or not the change request belongs to the support group that the request is assigned to.

**BMC Remedy Service Desk**

The BMC Remedy Service Desk consists of two applications:

- BMC Remedy Incident Management
- BMC Remedy Problem Management

These ITIL compliant applications automate the incident and problem management processes to enable IT to respond quickly and efficiently to conditions that disrupt critical services. Service Desk acts as a single point of contact for user requests, user-submitted incidents, and infrastructure-generated incidents.

The incident management process focuses on getting users up and running. Figure 1-5 illustrates the incident management process.

The problem management focuses on determining the root cause, and on using the change management process to correct the root cause of the problem.

*Figure 1-5: Incident management process*
The mission of the incident management process is to resolve incident requests as quickly as possible in a prioritized fashion. The BMC Remedy Incident Management application is designed to support this goal.

When dealing with incidents, BMC Remedy Incident Management is reactive, and is typically initiated in response to a customer call or an automated event. An example of an automated event might be an alert from a monitoring system, such as BMC Service Impact Manager (SIM). The primary goal of the incident management process, according to ITIL standards, is “to restore normal service operation as quickly as possible with minimum disruption to the business, thus ensuring that the best achievable levels of availability and service are maintained.”

NOTE
An incident is any event that is not part of the standard operation of a service and that causes an interruption to or a reduction in the quality of that service. Normal service operation is the operation of services within the limits specified by the service target. BMC Service Level Management, when integrated with BMC Remedy Incident Management monitors service targets.

BMC Remedy Incident Management also handles customer requests for service, such “I need a new laptop,” or “I need access to this network resource.”

For more information, see the BMC Service Desk: Incident Management User’s Guide.

Application and module integration

The following applications and modules are used by BMC Remedy Incident Management:

- Requester console module
- TMS module
- Cost Module
- BMC SLM application
- BMC Atrium CMDB application

Requester console

The Requester console provides the front-end interface for users into the BMC Remedy Incident Management application. The integration:

- Uses the Requester console to define incidents.
- Updates incident information using the work log.
- Has an interface back from the incident to the request that is stored in the Requester console.
- Updates the status of the request to match the status of the incident, and makes Work Info entries visible.
**Task Management System**

The Task Management System (TMS) module provides the ability to track specific tasks that are required to resolve an incident. The integration with TMS provides the ability to define ad hoc tasks.

Tasks are defined in TMS task forms. In BMC Remedy ITSM 7.5.00, only integration for ad hoc tasks is supported.

**Cost Module**

BMC Remedy Incident Management uses the Cost Module to track costs associated with incidents.

The integration uses the common cost creation dialog box that is provided by the Cost Module. Fields on the Incident Request form integrate with Cost Module forms to show cost data related to an incident.

**BMC SLM**

BMC Remedy Incident Management integrates with the BMC SLM application to provide service level definitions for resolution and response time for incidents.

When BMC SLM is installed, service targets and milestones that are associated with an incident are visible on a tab on the Incident Request form. The location of the tab depends on whether you are looking at the Classic view or the Best Practice view. For more information about these views, see the *BMC Remedy Incident Management User’s Guide*.

In addition to the user interface integration, the BMC Remedy Incident Management application also uses the definition structure of BMC SLM. BMC SLM has a plug-in architecture for helping users define terms and conditions, and measurements for a service target. BMC Remedy Incident Management provides a user interface for this BMC SLM plug-in architecture to make it simpler for users to build qualifications using a query-by-example (QBE) model.

**BMC Atrium CMDB**

BMC Remedy Incident Management integrates with the BMC Atrium CMDB using relationship tables. From BMC Remedy Incident Management, users can search for CIs and relate CIs to an incident.

When BMC Remedy Asset Management is installed, this integration is extended by prompting users to create outages against CIs they are relating to the incident. The outage data is stored in the BMC Remedy Asset Management database, with relationships created back to the incident.
Interfaces

BMC Remedy Incident Management provides a set of interfaces that can be used to integrate with the BMC Remedy Incident Management application. These interfaces include a set of BMC Remedy AR System forms that provide the ability to define, query, and modify incidents. They also include web services interfaces that are built on these forms to provide a mechanism to interface with the BMC Remedy Incident Management application using web services.

For more information, see the BMC Remedy IT Service Management Integrations white paper.

Licensing model

BMC Remedy Incident Management licensing is enabled using the Deployable Application mechanism in BMC Remedy AR System.

BMC Remedy Incident Management requires the following application-level and user-level licenses:

- BMC Remedy Incident Management application license
- Incident User fixed or floating user license for modifications on the Incident Request form
- BMC Atrium CMDB application license to access the BMC Atrium CMDB

Permission model

The permission model of the BMC Remedy Incident Management application has five basic roles:

- Incident Viewer
- Incident User
- Incident Master
- Incident Submitter
- Incident Config
The mission of the Problem Management process is to minimize the number of incidents. The BMC Remedy Problem Management application supports this goal by managing problem investigations, known errors, and Solution Database entries. Problem management can proactively prevent the occurrence of incidents, errors, and additional problems.

An important ITIL objective is investigating and resolving problems in a continuing effort to cut costs and improve services. A problem investigation helps an IT organization get to the root cause of incidents. It initiates actions that help to improve or correct the situation, preventing the incident from recurring. For example, if computers are running low on disk space, ideally the problem can be resolved before it becomes an incident. A problem investigation helps an IT organization get to the root cause of incidents. Problem investigations are usually triggered by either an incident review or by an application such as BMC Event Manager. BMC Event Manager can generate an event about a capacity threshold being reached. This might cause the problem coordinator to create a problem investigation to prevent a capacity shortage from causing outages.

After a problem investigation identifies the cause, this information can result in either a known error or a solution database entry. A known error is a problem that has been successfully diagnosed and for which a permanent solution has been proposed. A solution database entry contains information that might be required to provide or restore a service.

For more information, see the BMC Service Desk: Problem Management User's Guide.

**Problem investigation**

The problem investigation module of BMC Remedy Problem Management is focused on determining the root cause of a problem.

Problem investigation produce one of the following results:

- A known error, which describes the root cause as well as the proposed structural solution to remove the root cause
- A solution entry that describes how to work around the issue

**Known error**

After the root cause analysis of a problem investigation is completed and a structural solution has been proposed, a known error is created to request that the proposed solution is implemented. The implementation of the proposed solution is part of the Change Management process.

A known error process can have one of the following results:

- A change request to implement the needed fix.
- Closing the known error as an accepted issue, with updates to the knowledge database containing steps to avoid the issue.
Solutions database

The solutions database provides a simple repository of potential solutions to infrastructure issues. These might be workarounds or solutions to use in helping users get around an issue. The data from the solutions database becomes an input into a full knowledge management system with the use of the BMC Knowledge Management application.

Interfaces

BMC Remedy Problem Management provides a set of interfaces that can be used to integrate with the BMC Remedy Problem Management application. These interfaces include a set of BMC Remedy AR System forms that provide the ability to define, query, and modify incidents. They also include web services interfaces that are built on these forms to provide a mechanism to interface with the BMC Remedy Problem Management application using web services.

For more information, see the *BMC Remedy IT Service Management Integrations* white paper.

Licensing model

BMC Remedy Problem Management licensing is enabled using the Deployable Application mechanism in BMC Remedy AR System.

BMC Remedy Problem Management requires the following application-level and user-level licenses:
- BMC Remedy Problem Management application license
- Problem User fixed or floating user license
- BMC Atrium CMDB application license to access the BMC Atrium CMDB

Permission model

The permission model of the BMC Remedy Problem Management application has five basic roles:
- Problem Viewer
- Problem User
- Problem Master
- Problem Submitter
- Problem Config
Installing and configuring BMC Remedy ITSM applications

Application administrators use the Application Administration console to configure the BMC Remedy ITSM applications.

For information about installing and configuring BMC Remedy ITSM applications, see the BMC Remedy IT Service Management Installation Guide and the BMC Remedy IT Service Management Configuration Guide.

Customizing the BMC Remedy ITSM applications

BMC Remedy ITSM applications are built on AR System. This enables experienced administrators, workflow developers, and consultants to extend and customize the behavior of the applications to meet the changing needs of your organization and to integrate them with other applications. BMC offers courses for beginners through advanced workflow developers.

For more information, visit BMC education at: http://www.bmc.com

BMC Remedy Service Desk is shipped with predefined processes and rules that support the business model described in this guide and the BMC Remedy Incident Management User’s Guide and BMC Remedy Problem Management User’s Guide.

BMC Remedy Asset Management and BMC Remedy Change Management are shipped with predefined approval processes and rules that support the business model described in the BMC Remedy Asset Management User’s Guide, and the BMC Remedy Change Management User’s Guide. If you want to extend the functionality of the applications, the BMC Remedy Approval Server forms enable advanced users to define custom rules and processes.

You can use the Asset Management application as shipped, or you can customize it to meet your needs. Typical customization work includes adding AR System filters and active links to enhance workflow. If you customize Asset Management, you might also need to extend the BMC Atrium CMDB.

For information about extending the functionality of the applications, access the Customer Support website at: http://bmc.com/support_home/
Workflow definitions in BMC Remedy ITSM

Additional technical documentation for BMC Remedy ITSM is available on the Customer Support website. For example, BMC Remedy ITSM contains numerous menus, filters, active links, and table fields that can be customized to meet your organization’s needs. The Customer Support website provides documents that will assist you in modifying the BMC Remedy ITSM applications. You can access the Customer Support website at: http://bmc.com/support_home/

Field lists

Many character fields provide lists from which users can select options instead of entering data manually. These lists enable users to make selections conveniently, and help to make sure data is consistent. BMC Remedy ITSM uses configurable menus to provide the following benefits:

- Simplified presentation of options within any application form
- Multi-tiered categorizations for classifying incidents, problems, changes, and assets
- Convenient access to predefined reports

For information about configuring lists, see the BMC Remedy Action Request System Form and Application Objects Guide.

Filters

A filter is a mechanism that causes a set of actions to occur when specific conditions are met. Filters can also be used to establish rules for valid data entry. For example, if certain fields need to be filled in before a request can be submitted, a filter can activate a message indicating which fields need to be filled in.

For more information about filters, see the BMC Remedy Action Request System Form and Application Objects Guide.

Active links

BMC Remedy ITSM uses predefined active links to retrieve and update information.

For more information about active links, see the BMC Remedy Action Request System Form and Application Objects Guide.
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.

For more information about escalations, see the *BMC Remedy Action Request System Form and Application Objects Guide*.

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 from the supporting form, and each row represents an entry from the supporting form. If new entries are made to the supporting form, the user will see them when the table is refreshed. For more information about table fields, see the *BMC Remedy Action Request System Form and Application Objects Guide*.
This section describes modules and supporting applications used by BMC Remedy ITSM.

The following topics are provided:
- Command Automation Interface (page 56)
- Contract Management (page 58)
- Cost Module (page 58)
- Definitive Media Library (page 59)
- License Engine (page 60)
- Requester console (page 60)
- Task Management System (page 62)
- Release Management module (page 63)
- BMC Remedy AR System Assignment Engine (page 63)
- BMC Atrium CMDB (page 64)
- BMC Remedy Approval Server (page 64)
- BMC Remedy Knowledge Management (page 64)
- BMC Service Level Management (page 65)
- BMC Service Request Management (page 65)
Command Automation Interface

The Common Automation Interface (CAI) module provides a common infrastructure that can be shared across applications including BMC Remedy ITSM applications and BMC Configuration Automation for Clients.

Task Management System (TMS) and Service Request Management System (SRMS) use the CAI to communicate with BMC Remedy ITSM applications. In addition, TMS integrates with the BMC Configuration Automation for Clients application using the Common Automation Interface (CAI). TMS provides tasking capabilities to the BMC Remedy Change Management, BMC Remedy Problem Management, and BMC Remedy Incident Management applications. The SRMS framework supports the Requester console, which is the front-end user interface for BMC Remedy Change Management and BMC Remedy Incident Management.

The CAI module provides multi-threading for Data Management.

The functionality of CAI is based on the current implementation for SRMS framework command events and the requirements of TMS and Data Management. The CAI consists of three major blocks that result in event delivery to the target applications. For BMC Remedy ITSM 7.5, CAI is a back-end component that does not provide a front-end user interface. Additional user dialogs can be defined for each integrated component to push data into the CAI forms.

Phases of use with TMS

This section provides an overview of how the CAI module is used by TMS.

Definition phase: Application registration and command definition

Application registration defines the integration attributes to the external applications, such as application name, connection information, and interface form names.

Command definition describes the commands and the command parameters for each integrated component. For example, the Requester console has defined a set of commands for interaction with back-end applications. In TMS, a set of commands is defined for interaction with BMC Configuration Management. In addition, the CAI can include command parameter mappings to the registered applications.
Construction phase: Instantiation of the command definition as events

Command events are instantiated based on the command definitions. The event is constructed using the specific command name, and the command parameter values are populated by the integrated components. CAI provides the form structure and generic workflow for command instantiation. Each integrating component must implement the workflow to control its specific commands.

Execution phase: Event delivery

The mechanism that delivers the command events to the target system depends on the protocol used. The CAI event plug-in can be used for “AR” protocol, where the target is another BMC Remedy AR System application. This plug-in generates the appropriate records as specified in target information of the event. For “URL” protocol, workflow sets the URL string to the appropriate view field for the browser. CAI provides the generic event plug-in and each integrating component must implement the workflow to control the invocation of the plug-in, or use specific workflow for the delivery.

Interfaces

This section describes the interfaces for the CAI module.

CAI plug-in

The primary purpose of the CAI plug-in is to transmit events to other back-end applications. Due to the dynamic nature of the field mappings for each command, and because it is not possible to use workflow to push values to dynamic fields, the CAI plug-in provides a mechanism to dynamically map data to fields. For example, the command to generate a back-end request consists of dynamic field values that can be mapped to any field on the back-end interface forms. Additionally, the CAI plug-in helps address problems that arise with incompatible permission models.

Web services

The web service setup for the CAI is a “complex” web service, which means it is made up of multiple components and presented as a single interface. The two CAI components: CAI:Events and CAI:EventParameters, are defined as a single web service.
Permission model

The CAI has the Command Event Master role, which by default is mapped to the Command Event Master group, and can be granted to users using the People form. Only users in this group and BMC Remedy AR System administrators can access the CAI forms and update fields on them. For implementation of event error handling, integrating applications must have the same group and role mapping.

Contract Management

The Contract Management module provides a generic contract for tracking basic contract information and lifecycle. This module is used by BMC Remedy Asset Management and BMC SLM as a basis for their specific definitions of a contract.

Interfaces

The Contract Management module provides the underlying data and process model for basic contract management. This structure is used in the BMC Remedy Asset Management and BMC SLM applications.

Permission model

Contract Management permission groups are defined as computed groups in the Group form.

Each Contract permission group is mapped to an Asset permission group to support the deployable application functionality. To remove specific users from the computed group, remove the BMC Remedy Asset Management groups for each Contract permission group to make each Contract permission group stand alone.

Cost Module

The Cost module provides functions required by BMC Remedy ITSM suite applications for management of cost data. The costing model has two components: tracking of costs, and charge back calculations and reporting.

Each BMC Remedy ITSM application uses the Cost Module to track the costs related to the records in the application. For example, BMC Remedy Incident Management uses Cost Module to track the various costs associated to incident requests.
BMC Remedy Asset Management also uses the charge back functionality in the Cost Module. Chargebacks are roll ups of the costs that have been incurred over a period and involved in the various cost centers in a company. The charge back component of the Cost Module generates charge back entries, enables the financial manager to make appropriate adjustments to the costs, and generates invoices to be sent to the individual cost centers.

**Licensing model**

The Cost module requires an application-level license. This license is provided with all BMC Remedy ITSM applications. A user license is also required for the charge back component of the module. This license is required for making adjustments to the charge back functionality.

**Permission model**

The roles defined for the Cost module are:

- **Viewer**—Can only view cost data.
- **User**—Can add costs.
- **Manager**—Can update and manage the charge back process.

**Definitive Media Library**

The ITIL definition of the Definitive Media Library (DML) is a library where the definitive authorized versions of all software Configuration Items (CIs) are stored and protected. It is a physical library or storage repository where master copies of software versions are placed. This logical storage area might consist of one or more physical software libraries or file stores.

In short, the DML is a repository of authorized and approved software available to be deployed to the production environment. It contains or provides a reference to the “golden images.” The DML is a subset of the data stored in the product catalog. For more information about the DML, see the *BMC Atrium Product Catalog and Definitive Media Library Administrator’s Guide*.

The BMC implementation of the DML was designed around these principles and is structured to:

- Be the centralized store of authorized software package information.
- Ensure consistency between BMC Remedy Change Management and Configuration Management.
- Normalize entries in the BMC Atrium CMDB.
- Keep asset information in the BMC Atrium CMDB accurate.

The Definitive Media Library console is used to manage the contents of the DML.
Permission Model

The DML related permissions in the BMC Atrium Product Catalog, are as follows:

- **Level 1-DSL Administrator**—Can define and modify Product Dictionary and Software Library Item definitions.
- **Level 2-DSL User**—Can view Product Dictionary and Software Library item definitions.

For more information about these permissions, see the *BMC Atrium Product Catalog and Definitive Media Library Administrator’s Guide*.

License Engine

The License Engine is installed with BMC Remedy Asset Management. The License Engine performs the processing for the software license management feature to connect software CIs with license certificates and to calculate compliance. The License Engine runs as a plugin.

The user interacts with the License Engine from the License Jobs console (accessed from the Software Asset Management console) by scheduling license jobs to run and reviewing the results.

An interface in BMC Remedy Asset Management communicates between BMC Remedy Asset Management and the License Engine. The License Engine uses the CMDB API to query BMC Atrium CMDB.

For more information about software license management, see the *BMC Remedy Asset Management User’s Guide*.

Requester console

The Requester console is the customer-facing, user interface of the BMC Remedy Change Management and BMC Remedy Incident Management applications. It is a single entry point where users of these applications can submit a change request or report an incident.

The BMC Service Request Management (SRM) application provides a richer set of features and functions than the Requestor Console. If SRM is implemented, it is used instead of the Requestor Console as the customer-facing interface.

The Requester console is supported by the Service Request Management System (SRMS) framework, which implements the service request component for integration to the BMC Remedy Change Management and BMC Remedy Incident Management applications. The service request entity serves as a bridge and is not designed to be managed by service desk personnel. It is a “slave” to the back-end change request or incident with its lifecycle completely driven by the back-end. The Requester console is the front-end entry point for users to submit requests. Figure 2-1 illustrates the underlying Requester console framework.
The Requester console is a simplified interface for users to submit change requests and incident requests. This enables users to submit requests into the system from a single console, without having to access the BMC Remedy Change Management or BMC Remedy Incident Management consoles directly. The targeted audience is non-IT user requesters. For more information, see the *BMC Service Request Management Administrator’s and User’s Guide*.

**SRMS framework**

The SRMS framework provides a bridge between the front-end user requests and the back-end operations. In BMC Remedy ITSM, integrations are implemented to BMC Remedy Change Management and BMC Remedy Incident Management. However, the SRMS framework provides a structure that can be connected to any other open back-end solution.

The design of the SRMS framework is based on the following goals:

- Segment front-end transactions from back-end transactions.
- Act as a bridge between the Requester console front-end interface and BMC Remedy Change Management and BMC Remedy Incident Management back-end applications.
- Support synchronization between the front-end interface and back-end object life-cycle.
- Establish a foundation to support integration to back-end applications.
  - Integrate to BMC Remedy Change Management and BMC Remedy Incident Management as the back-end applications.
  - Provide a mechanism for establishing field mappings between the request entity and change request or incident, for request creation.
  - Provide CAI as a bi-directional communication mechanism for back-end integrations.
  - Integrate with BMC SLM for requester-focused service level agreements (SLA) tracking.
Task Management System

You use TMS module is used to create tasks. You create tasks by using TMS directly, or you can create task templates and task group templates that can be used by the BMC Remedy Change Management, BMC Remedy Incident Management, and BMC Remedy Problem Management applications. Besides the ability to set up predecessor-successor relationships, TMS supports branching and multiple task paths as well as data exchange between tasks. TMS also supports integration with the BMC Change Manager application through a launch mechanism.

The primary goal of the TMS module is to provide a mechanism to support repeatable processes. The result is improved productivity, reduction in novice errors, and a clear way to define business processes.

The TMS module significantly enhances the capability of the task operation. In addition to the predecessor and successor relationship, TMS supports branching and multiple paths, along with data exchange between tasks. TMS also supports integration with external applications, primarily using the Command Automation Interface (CAI) module.

For more information, see the BMC Remedy Task Management System Administrator’s Guide.

Permission model

TMS has four levels of accessibility:

- **Task Administrator (level 1)**—Controls template definition, with access to all tasks and task groups.
- **Task Manager (level 2)**—Can perform task implementer functions and also instantiate task group templates and task templates from the parent object. Can also create and update all tasks that are associated with the parent object.
- **Task Implementer (level 3)**—Can update and work on assigned tasks.
- **Task Viewer (level 4)**—Can view tasks in read-only mode.

For information about TMS user features, configuration, and administration, see the BMC Remedy Task Management System Administrator’s Guide.
Release Management module

The Release Management module helps you build and install controlled releases into your IT environment. A release is a collection of related authorized changes to an IT service that are tested and introduced into the live environment together. Release Management includes built-in ITIL best practices to better track and manage change and deployment activities. Release Management includes default support for managing standard release tasks from planning and design, build and configuration, to rollout and acceptance.

With numerous changes occurring daily, Release Management is the key component in ensuring applications are successfully deployed without compromising the integrity or availability of the production environment. Using a systematic and repeatable release process, organizations can achieve greater success rates of change rollout, higher quality of IT service, and accelerated time-to-market.

Well-planned and implemented release management makes a significant difference to an organization's service costs. Effective release management enables the service provider to add value to the business by:

- Better tracking and managing change and deployment activities
- Automatically notifying stakeholders at every phase of the release process
- Contributing to meeting auditable requirements for traceability through service transition
- Delivering changes faster and at a optimum cost and minimized risk
- Assuring that customers and users can use the new or changed service in a way that supports the business goals
- Improving consistency in the implementation approach across the business change, service teams, suppliers, and customers

BMC Remedy AR System Assignment Engine

The Assignment Engine is used to automatically determine an assignee for a request, based on a set of rules that you can configure. Such rules typically include the availability of employees and group membership. The engine can be configured to assign requests to employees either on a round-robin basis or by load balancing. Load balancing can be further configured by capacity of employees or by the number of requests assigned.

If you specify fall-back rules, the assignment engine makes sure that no request goes unassigned, and enables the application to find an available assignee who is best suited to work on the request.

For more information, see the BMC Remedy Action Request System Configuration Guide.
BMC Atrium CMDB

The BMC Atrium CMDB stores information about configuration items and their relationships in an inheritance-based data model, and has the ability to reconcile data from different sources. The BMC Atrium CMDB provides a “single source of truth” about your IT environment, enabling other BMC applications to manage CIs, predict the impact of configuration changes, and perform other Business Service Management (BSM) functions.

For more information, see the BMC Atrium CMDB User’s Guide.

BMC Remedy Approval Server

The Approval Server enables you to automate approval processes. When a BMC Remedy ITSM application triggers an approval process, the Approval Server routes a request to collect signatures within a defined approval process, handling all notifications and requests for more information as it collects each response (approving or rejecting). The Approval Server then reactivates the original application, reporting the result of the approval process. You can have multiple Approval Servers running with multiple AR System Servers on one computer.

For more information, see the BMC Remedy Approval Server Guide.

BMC Remedy Knowledge Management

BMC Remedy Knowledge Management (KM) is a world-class application that allows users to author and search for solutions in a knowledge base. It includes a comprehensive editor with extensive editing tools and a robust search engine that enables users to search for solutions using natural language or Boolean searches. BMC Remedy KM is also tightly integrated with the BMC Remedy Action Request System (BMC Remedy AR System), providing a seamless integration between knowledge management and service management.

BMC Remedy KM can improve staff efficiency, customer service and satisfaction, and business service quality. Call center efficiencies can be dramatically improved by providing agents with quick answers and solutions to customer issues. In addition, web-based self-service options allow employees or customers to find their own answers at any time using a natural language search.

For more information, see the BMC Remedy Knowledge Management Planning and Configuration Guide.
BMC Service Level Management

BMC SLM enables a service provider, such as an IT organization, a customer support group, or an external service provider, to formally document the needs of its customers or lines of business using service level agreements, and provide the correct level of service to meet those needs.

BMC SLM also provides a means to review, enforce, and report on the level of service provided. It streamlines the most important task of all, which is the communication between a service provider and its customers. Multiple service targets can be defined and monitored, acting as a bridge between IT service support and IT operations. This enables costs to be controlled and helps to provide a consistent level of service in support of a key business service.

For more information, see the BMC Service Level Management User's Guide.

BMC Service Request Management

BMC Service Request Management (SRM) enables IT to define offered services, publish those services in a service catalog and automate the fulfillment of those services for their users. With SRM, users have the ability to help themselves, which reduces the requests coming into the service desk. This enables IT to focus on more mission-critical activities, such as resolving incident requests related to service failures and restoring critical services. SRM also provides the ability to automate workflows for each service, enforcing consistency of process and faster fulfillment of the request.

For more information, see the BMC Service Request Management Administrator's and User's Guide.
This section describes common BMC Remedy IT Service Management user scenarios that you encounter as IT support staff. Calbro Services user personas help to illustrate the user scenarios. However, the user scenarios do not necessarily refer to specific Calbro Services sample data (for information about Calbro Services, see “Calbro Services” on page 68). To follow the user scenarios, in some instances, you might need to create your own sample data (for example, bulk inventory CIs).

The typical steps described by these user scenarios are in keeping with BMC best practices as outlined by the Service Management Process Model (SMPM).

The following topics are provided:

- Calbro Services (page 68)
- BMC Remedy Incident Management user scenarios (page 69)
- BMC Remedy Problem Management user scenarios (page 77)
- BMC Remedy Asset Management user scenarios (page 93)
- BMC Remedy Change Management user scenarios (page 105)
Calbro Services

In the BMC Remedy ITSM 7.5.00 documentation set, a fictional company named Calbro Services helps explain how ITSM principles and procedures are used in practice. Although Calbro Services is a fictional company, it is based on research of actual BMC Software customers. Learning how Calbro Services manages common IT Service Management scenarios should prove useful as you use the BMC Remedy ITSM applications in your own environment.

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

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online banking</td>
<td>500 ATMs in major cities</td>
</tr>
<tr>
<td>WWW presence</td>
<td>Corporate site and online brokerage services</td>
</tr>
<tr>
<td>Discount equity brokerage</td>
<td>Online and storefront services</td>
</tr>
<tr>
<td>Sales force automation</td>
<td>Automated sales activities such as leads, orders, reports, and so on</td>
</tr>
<tr>
<td>Customer support</td>
<td>Support centers in the United States, Europe, and Asia</td>
</tr>
<tr>
<td>Mass marketing</td>
<td>World-wide marketing campaigns aimed at making Calbro Services a household name</td>
</tr>
</tbody>
</table>
The following sections describe at a high-level common BMC Remedy Incident Management user scenarios that you typically encounter as IT support staff. The Calbro Services sample data is used to illustrate the user scenarios. For more detailed information about how to perform these procedures, see the BMC Remedy Incident Management User's Guide.

The following incident management scenarios are described:

- “Incident request resolution—first call resolution” on page 69
- “Incident request resolution—assignment to specialist” on page 71
- “Incident request resolution—emergency change request” on page 73

### Incident request resolution—first call resolution

This user scenario describes how to resolve an incident request on the first call.

Francie Stafford is a service desk analyst who works on the Calbro Services service desk. She receives a call from Joe Unser, a Calbro Services benefits agent who cannot access one of his key applications, because he is locked out of his user account. Francie creates an incident request, resolves the incident for Joe, and then closes the incident request.

**NOTE**

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

Detailed information about the individual tasks and actions mentioned in this user scenario are described in the BMC Remedy Incident Management User's Guide.

Table 3-2 describes the typical steps involved in this user scenario.
Table 3-2: Incident resolution—first call resolution

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Contacting the service desk</td>
<td>Joe needs to have one of his user accounts unlocked, and calls the service desk to open an incident request.</td>
</tr>
<tr>
<td>Service desk analyst</td>
<td>Registering the incident request record</td>
<td>Francie Stafford receives Joe’s call and, using the BMC Remedy Incident Management Best Practice view, creates a new incident request record using the applicable template.</td>
</tr>
<tr>
<td></td>
<td>Resolving the incident request</td>
<td>Using Incident Matching, Francie is able to unlock Joe’s account while he is on the phone.</td>
</tr>
<tr>
<td>Service desk analyst and Service desk customer</td>
<td>Closing the incident request</td>
<td>While Joe is still on the phone, Francie asks him to confirm that his account is unlocked and that he can log in to his system. Joe confirms this, so Francie updates the resolution field on the incident request record to indicate this. Francie closes the incident request record.</td>
</tr>
</tbody>
</table>
Incident request resolution—assignment to specialist

This user scenario describes how to resolve an incident request by assigning it to a specialist.

Francie Stafford receives a call from Joe Unser, who cannot send documents to his local printer. Francie creates an incident request, but cannot resolve it herself. The incident request is automatically assigned to a specialist, Ian Plyment, who accepts the assignment and restores Joe’s printer connection. Ian then closes the incident request.

**NOTE**

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

Detailed information about the individual tasks and actions mentioned in this user scenario are described in the *BMC Remedy Incident Management User’s Guide*.

Table 3-3 describes the typical steps involved in this user scenario.

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service desk customer</td>
<td><strong>Contacting the service desk</strong></td>
<td>Joe cannot send documents to his local printer and calls the help desk for assistance.</td>
</tr>
<tr>
<td></td>
<td>1 The customer contacts the help desk</td>
<td></td>
</tr>
<tr>
<td>Service desk analyst</td>
<td><strong>Registering the incident request record</strong></td>
<td>Francie Stafford receives Joe’s call and, using the BMC Remedy Incident Management Best Practice view, creates a new incident request record from the applicable template.</td>
</tr>
<tr>
<td></td>
<td>1 On the Incident console click Create to open a new incident request record.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Type the first few letters of the customer’s email address on the incident request form and then presses Enter.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The application matches the email address and fills in part of the incident request record based on the contents of customer’s People record.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Click in the Template field and press Enter. The Incident Template Selection dialog box appears.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 Select the appropriate template, which will populate the new incident request record with basic information common to all requests of this type.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Complete the incident request registration and save it. The incident request is assigned to the assignment group specified in the template.</td>
<td></td>
</tr>
</tbody>
</table>
From the Incident console header, select your company in the Company field and your support group from the View By field.

2. Run the All Open Unassigned - All Priorities search from the Defined searches area.
   This returns all of the open, unassigned incident requests for your support group.

3. Select an incident request and open it.

4. In the Navigation pane, select Assign to Me and then change the record’s status to In Progress.

### Using Incident Matching to resolve the incident

1. From the Navigation pane on the incident request record, open the Incident Matching window.

2. On the Search Criteria Page 1 tab, type Printer in the Summary Keyword Search field and select Connectivity from the Operational Categorization Tier 1 menu.

3. Click Search.
   Any matching incidents, problem investigations, known errors, and solutions appear in the tabs at the bottom half of the dialog box.

4. Views details of the matching records and look for information that helps resolve the incident request.

5. From the Relationship Type list on the Incident Matching window, select Resolved By and then click Relate With Solution.
   This copies the solution from the matching record to the Resolution field of the incident request record.

### Table 3-3: Incident resolution with assignment to specialist (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialist</td>
<td><strong>Accepting the assignment</strong>&lt;br&gt;1. From the Incident console header, select your company in the Company field and your support group from the View By field.&lt;br&gt;2. Run the All Open Unassigned - All Priorities search from the Defined searches area.&lt;br&gt;   This returns all of the open, unassigned incident requests for your support group.&lt;br&gt;3. Select an incident request and open it.&lt;br&gt;4. In the Navigation pane, select Assign to Me and then change the record’s status to In Progress.</td>
<td>Ian Plyment is a specialist who works for the support group to which Joe’s incident request is assigned. From the Incident console, Ian runs a defined search for all open, unassigned incident request for his support group. Joe’s incident request is one of the records found by the search. Ian opens the record and accepts the assignment.</td>
</tr>
<tr>
<td>Specialist</td>
<td><strong>Using Incident Matching to resolve the incident</strong>&lt;br&gt;1. From the Navigation pane on the incident request record, open the Incident Matching window.&lt;br&gt;2. On the Search Criteria Page 1 tab, type Printer in the Summary Keyword Search field and select Connectivity from the Operational Categorization Tier 1 menu.&lt;br&gt;3. Click Search.&lt;br&gt;   Any matching incidents, problem investigations, known errors, and solutions appear in the tabs at the bottom half of the dialog box.&lt;br&gt;4. Views details of the matching records and look for information that helps resolve the incident request.&lt;br&gt;5. From the Relationship Type list on the Incident Matching window, select Resolved By and then click Relate With Solution.&lt;br&gt;   This copies the solution from the matching record to the Resolution field of the incident request record.</td>
<td>Ian uses the Incident Matching feature to determine the cause of Joe’s incident and resolves it by restoring Joe’s printer connection.</td>
</tr>
</tbody>
</table>
Incident request resolution—emergency change request

This user scenario describes how to resolve an incident request with an emergency change request.

Joe Unser, a Calbro Services benefits agent, cannot access the local area network. He contacts the Calbro Service desk, and Francie Stafford, a service desk analyst, creates an incident request.

The incident request is assigned to Ian Plyment, a specialist in the support group assigned to Joe’s company. Ian determines that Joe’s data port is broken, and an emergency change is required to restore Joe’s service.

Ian contacts Allen Allworth, the owner of the service to let him know an emergency change is required. Allen assesses the risk and authorizes Ian to perform the work.

Ian creates an emergency change request record, then replaces Joe’s data port. Ian verifies with Joe that he can now access the local area network.

Ian closes the incident request and notifies Mary Mann, the change coordinator, of the emergency change so she can register the change. This ensures everyone can see what was changed, should the emergency change cause other incidents to occur. It also ensures that Allen is informed that the change took place and the CMDB is updated.

**NOTE**

This user scenario assumes that your application administrator has configured the approval process to bypass the normal approval process for emergency change requests. For more information, see the *BMC Remedy IT Service Management Configuration Guide*.

---

Table 3-3: Incident resolution with assignment to specialist (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialist</td>
<td><strong>Completing the incident request</strong>&lt;br&gt;1 On the incident request record, ensure that all other required fields on the incident request record are completed.&lt;br&gt;2 Move the incident request record’s status to Resolved and provide a status reason of Customer Follow-Up Required.</td>
<td>Ian is unable to contact Joe directly to determine that his printing service is successfully restored, so he completes the incident request by moving the status to Resolved with a status reason of Customer Follow-Up Required. BMC Remedy Incident Management sends Joe an email asking him to contact the Service Desk to confirm that the incident is resolved. If Joe does not respond within a specific period of time, which is configurable for each installation, the auto close rule moves the incident request’s status to Closed.</td>
</tr>
</tbody>
</table>
NOTE

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

Detailed information about the individual tasks and actions mentioned in this user scenario are described in the *BMC Remedy Incident Management User’s Guide* and the *BMC Remedy Change Management User’s Guide*.

Table 3-4 describes the typical steps involved in this user scenario.

**Table 3-4: Resolving an incident request with an emergency change**

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service desk customer</td>
<td><strong>Contacting the service desk</strong>&lt;br&gt;1 The customer contacts the service desk.</td>
<td>Joe cannot access the local area network.</td>
</tr>
<tr>
<td>Service desk analyst</td>
<td><strong>Registering the incident request record</strong>&lt;br&gt;1 On the Incident console, click Create, to open a new incident request record. 2 Type the first few letters of the customer’s email address on the incident request form and then press Enter. The application matches the email address and fills in part of the incident request record based on the contents of the customer’s People record. 3 Select the appropriate template to populate the new incident request record with basic information common to all requests of this type. 4 Open Incident Matching from the Navigation pane and search for similar incident request records that have been closed. 5 If you cannot find a matching incident, complete the incident request registration and save it. The incident request is assigned to an assignment group as specified in the template.</td>
<td>Francie Stafford receives Joe’s call and, using the BMC Remedy Incident Management Best Practice view, creates a new incident request record from the applicable template.</td>
</tr>
</tbody>
</table>
Table 3-4: Resolving an incident request with an emergency change (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialist</td>
<td><strong>Accepting the assignment</strong>&lt;br&gt;1 On the Incident console header, select your company in the Company field and your support group from the View By field.&lt;br&gt;2 From the Defined searches area, run the All Open Unassigned - All Priorities search, which returns all of the open, unassigned incident requests for your support group.&lt;br&gt;3 Select the customer’s incident request and open it.&lt;br&gt;4 In the Navigation pane, select Assign to Me and then change the record’s status to In Progress.&lt;br&gt;5 On the Work Details tab of the incident request, create a Work Info entry indicating the incident request is being handled according to the emergency change protocol.</td>
<td>Ian Plyment is a specialist working for the support group that supports Joe’s company. Ian searches for all open, unassigned incident request for his support group. Joe’s incident request is one of the records found by the search. Ian opens the record and accepts the assignment. Ian investigates Joe’s incident request and determines his data port is broken. The fix requires an emergency change. Ian contacts Allen Allworth, the owner of the affected service, to tell him this incident request requires an emergency change. Ian also notes this in the Work Detail tab of the incident request. Allen analyzes the risk and impact of the emergency change request and then authorizes Ian to implement the emergency change.</td>
</tr>
</tbody>
</table>
Creating the Emergency Change

1. From the incident request, click Create Change from the Create Other Requests area of the navigation pane to create a new change request.
   This opens the Change Request form and copies information from the incident request record to the change request record.
2. On the Change Request form, select the Change Type and then the Risk Level.
3. On the Classification tab of the Change Request form, select the Timing—"Emergency."
4. On the assignment tab, assign the change request to yourself by selecting your own support company, support organization, and the support group.
5. Click Save, which opens the Incident Relationship Search form.
6. Search for the customer’s incident request and then create a relationship between the incident ticket and the emergency change request.

Implementing the Change

1. Perform the necessary change.
2. Contact the customer to verify that the affected service has been restored.
3. On the incident request record, change the record’s status to “Closed.”

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialist</td>
<td><strong>Creating the Emergency Change</strong></td>
<td>From Joe’s incident ticket, Ian creates the emergency change request. By creating the request from the incident request, much of the information is copied directly from the incident request record to the change request record. This saves time and ensures accuracy. While creating the emergency change request, Ian creates a relationship between Joe’s incident request and the emergency change request.</td>
</tr>
<tr>
<td></td>
<td>1. From the incident request, click Create Change from the Create Other Requests area of the navigation pane to create a new change request. This opens the Change Request form and copies information from the incident request record to the change request record.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. On the Change Request form, select the Change Type and then the Risk Level.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. On the Classification tab of the Change Request form, select the Timing—&quot;Emergency.&quot;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. On the assignment tab, assign the change request to yourself by selecting your own support company, support organization, and the support group.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Click Save, which opens the Incident Relationship Search form.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. Search for the customer’s incident request and then create a relationship between the incident ticket and the emergency change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Implementing the Change</strong></td>
<td>After the change is implemented and verified, Ian closes the incident request and asks Mary Mann, the change coordinator to register a change for this emergency change. This ensures everyone can see what was changed, in case the emergency change causes incidents to occur. This also makes sure Allen, the service owner, is informed and the CMDB is updated.</td>
</tr>
<tr>
<td></td>
<td>1. Perform the necessary change.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Contact the customer to verify that the affected service has been restored.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. On the incident request record, change the record’s status to “Closed.”</td>
<td></td>
</tr>
</tbody>
</table>
BMC Remedy Problem Management user scenarios

The following sections describe at a high-level common BMC Remedy Problem Management user scenarios that you typically encounter as IT support staff. The Calbro Services sample data is used to illustrate the user scenarios. For more detailed information about how to perform these procedures, see the *BMC Remedy Problem Management User’s Guide*.

The following problem management scenarios are described:

- “Problem investigation resolution—change request” on page 77
- “Problem investigation resolution—no change request” on page 82
- “Problem investigation resolution—change request roll back” on page 85
- “Problem investigation—at impasse” on page 89

**Problem investigation resolution—change request**

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

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

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

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

**NOTE**

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

Detailed information about the individual tasks and actions mentioned in this user scenario are described in the *BMC Remedy Incident Management User’s Guide*, the *BMC Remedy Problem Management User’s Guide*, and the *BMC Remedy Change Management User’s Guide*. 
Table 3-5 describes the typical steps involved in this user scenario.

### Table 3-5: Resolving a problem investigation with a change request

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Problem coordinator</strong></td>
<td><strong>Performing the incident request review</strong></td>
<td>The problem coordinator, Bob Baxter, performs an incident request review on the OPS by querying the Incident Management system for incidents or recent changes related to the OPS. Bob discovers that over the past six months there were several similar incidents related to the OPS.</td>
</tr>
<tr>
<td></td>
<td>1. From the IT Home page, open the BMC Remedy Incident Management application.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. From the Defined Searches area of the Navigation pane, select Manage My Searches, to create a custom search.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Using the Build Search Qualification feature of Manage My Searches, create a custom search for records that have the following characteristics:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Service = OPS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Impact =&gt; 2-Significant/Large OR 1-Extensive/Widespread</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- the Last Resolved Date &gt;= 07/19/2008</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> For the purpose of this example, assume today's date is 11/19/2008. This means the date you use for the Last Resolved Date is, 07/19/2008 — four months ago.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. After running the search, look for incident request records that have not yet been linked to a problem investigation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Creating the problem investigation</strong></td>
<td>Bob wants to determine the root cause of these incidents, so he creates a problem investigation from one of the incident request records. Creating the problem investigation from an incident request record ensures that all of the relevant details are copied over from the incident request to the problem investigation. Bob then relates the remaining OPS incidents to the problem investigation, along with the actual OPS CI.</td>
</tr>
<tr>
<td></td>
<td>1. From one of the incident request records that is related to the OPS server issue, click Create Problem from the Create Other Requests area in the Navigation pane.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Problem form appears. The incident record’s details are copied from the incident request record to the Problem form and a relationship is created between the problem investigation record and the incident request records.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Complete the Problem form.</td>
<td></td>
</tr>
</tbody>
</table>
### Table 3-5: Resolving a problem investigation with a change request (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Problem coordinator</strong></td>
<td><strong>Relating other records to the problem investigation</strong></td>
<td>Bob then relates the other incident requests and the CI to the problem investigation.</td>
</tr>
<tr>
<td></td>
<td>1 With the problem investigation record open, click the Relationships tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Create relationships between the problem investigation and all of the related incident requests.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Create a relationship between the problem investigation and the OPS server.</td>
<td></td>
</tr>
<tr>
<td><strong>Assigning the problem investigation to the specialist.</strong></td>
<td>1 From the Assignment tab of the problem investigation record assign the problem investigation record to the specialist.</td>
<td>Bob assigns the problem investigation to the specialist, Ian Plyment, to conduct a root cause analysis.</td>
</tr>
<tr>
<td><strong>Specialist</strong></td>
<td><strong>Accepting the assignment and performing the root cause analysis</strong></td>
<td>Ian accepts the problem investigation assignment and begins a root cause analysis. During the root cause analysis, he determines the physical server on which the OPS runs needs a memory upgrade and sends his root cause analysis to Bob.</td>
</tr>
<tr>
<td></td>
<td>1 Open problem investigation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Set the problem investigation’s status to Under Investigation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Perform the root cause analysis.</td>
<td></td>
</tr>
<tr>
<td><strong>Problem coordinator</strong></td>
<td><strong>Performing the analysis review</strong></td>
<td>Bob reviews and verifies Ian’s analysis. Bob then creates a Known Error, which serves two purposes. First, to identify the best work around (temporarily routing the users to a redundant server) and second, to request a change for the memory upgrade on the primary OPS server.</td>
</tr>
<tr>
<td></td>
<td>1 Open the problem investigation and click the Work Info tab to review the work information entries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Independently verify that the specialist’s assessment of the root cause is correct.</td>
<td></td>
</tr>
</tbody>
</table>
With the problem investigation record open, set the Status field to Completed and the Status Reason field to Known Error.

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

1. Enter a brief description of the known error in the Summary field.
2. Select the impact and urgency.
3. In the Known Error Details area of the Classification tab, select the company and then enter a detailed description of the change requirements in the Notes field.
4. Select the appropriate operational and the appropriate product categorizations.
5. On the Assignment tab, type your name in the Assignee field in the Problem Manager Assignment area and the change coordinator’s name in the Assignee field in the Known Error Assignment area.
6. Set the Status to Assigned.
7. Save the known error.

Bob creates the known error directly from the problem investigation, which transfers all pertinent information to the change request. Bob assigns the known error to Mary Mann, the change coordinator.

From the Navigation pane on the Known Error record, select Create Other Requests > Create Change. This opens the Change Request form and creates a relationship between the known error, the problem investigation, and the change request. It also copies information from the known error record to the change request record.

1. Enter the required information to finish creating the change request and then save the change request.
2. Using the Project Flow Status bar, move the change request through its lifecycle.
3. When prompted, approve the change request and add a start and an end date.

Mary receives the Known Error and reviews it. She agrees that the change is required and creates a change request from the known error. Mary moves the record through the change request lifecycle.

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem coordinator</td>
<td><strong>Creating a known error</strong></td>
<td>Bob creates the known error directly from the problem investigation, which transfers all pertinent information to the change request. Bob assigns the known error to Mary Mann, the change coordinator.</td>
</tr>
<tr>
<td></td>
<td>1. With the problem investigation record open, set the Status field to Completed and the Status Reason field to Known Error. This opens the Known Error form and creates a relationship between the known error and the problem investigation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Enter a brief description of the known error in the Summary field.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Select the impact and urgency.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. In the Known Error Details area of the Classification tab, select the company and then enter a detailed description of the change requirements in the Notes field.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Select the appropriate operational and the appropriate product categorizations.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. On the Assignment tab, type your name in the Assignee field in the Problem Manager Assignment area and the change coordinator’s name in the Assignee field in the Known Error Assignment area.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7. Set the Status to Assigned.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8. Save the known error.</td>
<td></td>
</tr>
<tr>
<td>Change coordinator</td>
<td><strong>Creating the change request from a known error</strong></td>
<td>Mary receives the Known Error and reviews it. She agrees that the change is required and creates a change request from the known error. Mary moves the record through the change request lifecycle.</td>
</tr>
<tr>
<td></td>
<td>1. From the Navigation pane on the Known Error record, select Create Other Requests &gt; Create Change. This opens the Change Request form and creates a relationship between the known error, the problem investigation, and the change request. It also copies information from the known error record to the change request record.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Enter the required information to finish creating the change request and then save the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Using the Project Flow Status bar, move the change request through its lifecycle.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. When prompted, approve the change request and add a start and an end date.</td>
<td></td>
</tr>
</tbody>
</table>
Table 3-5: Resolving a problem investigation with a change request (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change coordinator</td>
<td><strong>Assigning the change request to a specialist</strong></td>
<td>On the change request record, Mary creates a task to implement the change, and assigns the change request to Ian Plyment, the specialist who will perform the work. The coordinator also relates the CI to the change request.</td>
</tr>
<tr>
<td></td>
<td>1. Add a task to the change record.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Relate the CIs to the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Use the Process Flow Status bar to move the change request to the Implement stage.</td>
<td></td>
</tr>
<tr>
<td>Specialist</td>
<td><strong>Closing the tasks</strong></td>
<td>Ian implements the change. When he finishes the last task, the system notifies Mary that the tasks are closed.</td>
</tr>
<tr>
<td></td>
<td>1. Open the Change Management Support Console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Using Quick Actions, set Tasks as the primary table on the console, and then open and execute the task.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Enter the actual start and end dates of the task, the time spent on the task, and relevant work information.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Change the status of the task to Closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Save the work.</td>
<td></td>
</tr>
<tr>
<td>Change coordinator</td>
<td><strong>Completing the change request</strong></td>
<td>After Mary coordinates the change implementation, she reassigns the known error to Bob for verification.</td>
</tr>
<tr>
<td></td>
<td>1. Use the Process Flow Status bar to move the request to the Closed stage.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Enter the performance rating and the actual start and end date of the change request.</td>
<td></td>
</tr>
<tr>
<td>Problem coordinator</td>
<td><strong>Closing the problem investigation and known error</strong></td>
<td>Bob is notified that the change was completed and verifies that it fixed the problem. He then changes the status of the problem investigation and known error to closed.</td>
</tr>
<tr>
<td></td>
<td>1. Confirm that the change has solved the problem.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Open the problem investigation record and check that the details are all correct, and then set the Status field to Closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Open the known error record and set the Status field to Closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. On the Resolution tab, record a summary of how the known error was resolved.</td>
<td></td>
</tr>
</tbody>
</table>
Problem investigation resolution—no change request

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

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

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

Detailed information about the individual tasks and actions mentioned in this user scenario are described in the BMC Remedy Incident Management User’s Guide and the BMC Remedy Problem Management User’s Guide.
Table 3-6 describes the typical steps involved in this user scenario.

### Table 3-6: Resolving a problem investigation without a change request

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Problem Coordinator | **Performing the incident request review**  
1. From the IT Home page, open the BMC Remedy Incident Management application.  
2. From the Defined Searches area of the Incident console Navigation pane, select Manage My Searches, to create and save a custom search. By saving the search, you can use it for future incident request reviews.  
3. Use the Build Search Qualification feature of Manage My Searches to create a custom search for records that have the following characteristics:  
   - Service = Payroll  
   - Impact => 2-Significant/Large OR 1-Extensive/Widespread  
   - the Last Resolved Date >= 07/19/2008  
**Note:** For the purpose of this example, assume today’s date is 11/19/2008. The Last Resolved Date used in this example, therefore, is four months ago.  
4. After running the search, look for incident request records that have not yet been linked to a problem investigation and that have been resolved with a workaround. | Bob performs an incident request review by searching incident requests registered against the services for which he is the problem coordinator. |
|                     | **Creating the problem investigation**  
1. From one of the incident request records related to the Payroll service performance issue, click Create Problem from the Create Other Requests area in the Navigation pane. The Problem form appears. The incident record’s details are copied from the incident request record to the Problem form and a relationship is created between the problem investigation record and the incident request records.  
2. Complete the Problem form. | Bob spots a trend — numerous performance-related incidents have been reported against the Payroll service. Bob creates a Problem Investigation record directly from one of the incident request records. Creating a problem investigation directly from an incident request record transfers all relevant information from the incident request and automatically establishes the relation between the incident request and the problem investigation. |
Problem Coordinator

Relating other records to the problem investigation
1. With the newly created problem investigation still open, click the Relationships tab.
2. Create relationships between the problem investigation and all of the related incident requests.

Assigning the problem investigation to the specialist
1. With the problem investigation record open, click the assignment tab.
2. In the Problem Assignment area, assign the problem investigation to a specialist.

Specialist

Accepting the assignment and performing the root cause analysis
1. Open the problem investigation.
2. Set the problem investigation's status to Under Investigation.
3. Perform the root cause analysis.

Implementing the solution
1. Change the problem investigation Status to Completed and indicate the status reason.
2. On the Classification tab, select the appropriate product categorization.
3. Add work information to detail the changes to the anti-virus software.
4. Complete the other required fields on the problem investigation form.
5. Complete the other optional fields on the problem investigation form as required by this investigation.

Notifying the problem coordinator
1. On the Assignment tab of the problem investigation, ensure the Assignee field in the Problem Manager Assignment area is set to the name of the problem coordinator.
2. From the Status field menu, select Assigned.

Bob then relates the other incident requests to the problem investigation.

After creating the problem investigation, Bob assigns it to the specialist, Ian Plyment.

Ian accepts the problem investigation assignment and begins a root cause analysis. During the root cause analysis, he determines the anti-virus software on the server runs every ten minutes, which is responsible for causing the performance issues. Ian determines the more appropriate frequency for the anti-virus software to run is once an hour.

Because the changes to the anti-virus software configuration do not meet the criteria for the change management process, Ian makes the necessary changes himself and then changes the status of the problem investigation to Completed.

Ian notifies Bob about the results of the problem investigation and the corrective action he undertook.
Table 3-6: Resolving a problem investigation without a change request (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem Coordinator</td>
<td><strong>Performing the analysis review</strong>&lt;br&gt;1. Open the problem investigation, click the Work Info tab, and review the work information entries.&lt;br&gt;2. Independently verify that the changes have corrected the problem.</td>
<td>Bob performs an analysis review and double-checks that the problem has been corrected.</td>
</tr>
<tr>
<td></td>
<td><strong>Closing the problem investigation</strong>&lt;br&gt;1. Review the problem investigation form to verify that the details are complete.&lt;br&gt;2. When you are satisfied that the problem investigation form is complete and correct, move the problem investigation status to Closed.</td>
<td>Bob closes the problem investigation.</td>
</tr>
</tbody>
</table>

**Problem investigation resolution—change request roll back**

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

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

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

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

**NOTE**

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

Detailed information about the individual tasks and actions mentioned in this user scenario are described in the *BMC Remedy Incident Management User’s Guide*, the *BMC Remedy Problem Management User’s Guide*, and the *BMC Remedy Change Management User’s Guide*. 
Table 3-7 describes the typical steps involved in this user scenario.

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem coordinator</td>
<td><strong>Performing the incident request review</strong>&lt;br&gt;1. From the IT Home page, open the BMC Remedy Incident Management application.&lt;br&gt;2. From the Defined Searches area of the Navigation pane, select Manage My Searches, to create a custom search.&lt;br&gt;3. Using the Build Search Qualification feature of Manage My Searches, create a custom search for records that have the following characteristics:&lt;br&gt;  - Service = Payroll&lt;br&gt;  - Impact =&gt; 2-Significant/Large 2-Significant/Large OR 1-Extensive/Widespread&lt;br&gt;  - the Last Resolved Date &gt;= 07/19/2008&lt;br&gt;Note: For the purpose of this example, assume today’s date is 11/19/2008. This means the date you use for the Last Resolved Date is, 07/19/2008—four months ago.&lt;br&gt;4. After running the search, look for incident request records that have not yet been linked to a problem investigation.</td>
<td>Bob performs an incident request review by searching incident requests registered against the payroll service, for which he is the problem coordinator.</td>
</tr>
<tr>
<td></td>
<td><strong>Creating the problem investigation</strong>&lt;br&gt;1. From one of the incident request records that are related to the payroll service, click Create Problem from the Create Other Requests area in the Navigation pane.&lt;br&gt;The Problem form appears. The incident record’s details are copied from the incident request record to the Problem form and a relationship is created between the problem investigation record and the incident request records.&lt;br&gt;2. Complete the Problem form.</td>
<td>Bob spots a trend — numerous incidents have been reported against the payroll server CI, which is critical to making that service available. He also discovers the server recently was the subject of a change. Bob reviews the change related to the server and determines the recent change to the CI was the root cause of those incident requests. Bob creates a problem investigation record directly from one of the incident request records, which transfers all relevant information from the incident request and automatically establishes the relation between the incident request and the problem investigation.</td>
</tr>
</tbody>
</table>
### Rolling back a change (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem coordinator</td>
<td><strong>Relating other records to the problem investigation</strong></td>
<td>Bob then relates the other incident requests, the original change request, and the CI to the problem investigation.</td>
</tr>
<tr>
<td></td>
<td>1 With the problem investigation record open, click the Relationships tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Create relationships between the problem investigation and all of the related incident requests.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Create a relationship between the problem investigation and the original change request that is responsible for triggering the incident requests.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Creating a known error</strong></td>
<td>Bob determines that the best way to prevent similar incident requests from recurring is to rollback the original change. To request the roll back, Bob creates a known error from the problem investigation. He assigns the known error to Mary Mann, the change coordinator.</td>
</tr>
<tr>
<td></td>
<td>1 With the problem investigation record open, set the Status field to Completed and the Status Reason field to Known Error.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Enter a brief description of the known error in the Summary field.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Select the impact and urgency.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 In the Known Error Details area of the Classification tab, select the company and then enters a detailed description of the change requirements in the Notes field.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Select the appropriate operational and the appropriate product categorizations.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 On the Assignment tab, type your name in the Assignee field in the Problem Manager Assignment area and the change coordinator’s name in the Assignee field in the Known Error Assignment area.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7 Set the Status to Assigned.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8 Save the known error.</td>
<td></td>
</tr>
</tbody>
</table>
### Change coordinator

1. From the Navigation pane on the Known Error record, select Create Other Requests > Create Change. This opens the Change Request form and creates a relationship between the known error, the problem investigation, and the change request. It also copies information from the known error record to the change request record.
2. Enter the required information to finish creating the change request and then save the change request.
3. Using the Project Flow Status bar, move the change request through its lifecycle.
4. When prompted, approve the change request and add a start and an end date.
5. Create a broadcast to alert users about the rollback.

Mary receives the Known Error and reviews it. She agrees that the rollback is required and creates a change request from the known error. Mary moves the record through the change request lifecycle. As part of the change request, the change coordinator creates a broadcast alerting users to the incorrect original change and the symptoms in the defective CI. The broadcast mentions the new change and the time when the CI will be unavailable—while the change is being executed. Finally, the broadcast explains that the change was necessary to avoid further incoming related incidents.

### Assigning the change request to a specialist

1. Add a task to the change record.
2. Relate the CIs to the change request.
3. Use the Process Flow Status bar to move the change request to the Implement stage.

On the change request record, Mary creates a task to roll back the CI and assigns the change request to Ian Plyment, the specialist who will perform the work. The coordinator also relates the CI to the change request.

### Specialist

1. Open the Change Management Support Console.
2. Using Quick Actions, set Tasks as the primary table on the console, and then open and execute the task.
3. Enter the actual start and end dates of the task, the time spent on the task, and relevant work information.
4. Change the status of the task to Closed.
5. Save the work.

Ian rolls back the change to the CI. When he finishes the last task, the system notifies Mary that the tasks are closed.

### Table 3-7: Rolling back a change (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change coordinator</td>
<td><strong>Creating the change request from a known error</strong></td>
<td>Mary receives the Known Error and reviews it. She agrees that the rollback is required and creates a change request from the known error. Mary moves the record through the change request lifecycle. As part of the change request, the change coordinator creates a broadcast alerting users to the incorrect original change and the symptoms in the defective CI. The broadcast mentions the new change and the time when the CI will be unavailable—while the change is being executed. Finally, the broadcast explains that the change was necessary to avoid further incoming related incidents.</td>
</tr>
<tr>
<td></td>
<td>1 From the Navigation pane on the Known Error record, select Create Other Requests &gt; Create Change. This opens the Change Request form and creates a relationship between the known error, the problem investigation, and the change request. It also copies information from the known error record to the change request record.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Enter the required information to finish creating the change request and then save the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Using the Project Flow Status bar, move the change request through its lifecycle.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 When prompted, approve the change request and add a start and an end date.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Create a broadcast to alert users about the rollback.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Assigning the change request to a specialist</strong></td>
<td>On the change request record, Mary creates a task to roll back the CI and assigns the change request to Ian Plyment, the specialist who will perform the work. The coordinator also relates the CI to the change request.</td>
</tr>
<tr>
<td></td>
<td>1 Add a task to the change record.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Relate the CIs to the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Use the Process Flow Status bar to move the change request to the Implement stage.</td>
<td></td>
</tr>
<tr>
<td>Specialist</td>
<td><strong>Closing the tasks</strong></td>
<td>Ian rolls back the change to the CI. When he finishes the last task, the system notifies Mary that the tasks are closed.</td>
</tr>
<tr>
<td></td>
<td>1 Open the Change Management Support Console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Using Quick Actions, set Tasks as the primary table on the console, and then open and execute the task.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Enter the actual start and end dates of the task, the time spent on the task, and relevant work information.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 Change the status of the task to Closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Save the work.</td>
<td></td>
</tr>
</tbody>
</table>
This user scenario describes how to indicate a problem investigation at an impasse.

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

**NOTE**

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

Detailed information about the individual tasks and actions mentioned in this user scenario are described in the *BMC Remedy Incident Management User’s Guide* and the *BMC Remedy Problem Management User’s Guide*.

Table 3-8 describes the typical steps involved in this user scenario.
### Table 3-8: Indicating a problem investigation at an impasse

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem Coordinator</td>
<td><strong>Performing the incident request review</strong>&lt;br&gt;1 From the IT Home page, open the BMC Remedy Incident Management application.&lt;br&gt;2 From the Defined Searches area of the Navigation pane, select Manage My Searches, to create a custom search.&lt;br&gt;3 Using the Build Search Qualification feature of Manage My Searches, create a custom search for records that have the following characteristics:&lt;br&gt;  - Service = Payroll  &lt;br&gt;  - Impact =&gt; 2-Significant/Large 2-Significant/Large OR 1-Extensive/Widespread  &lt;br&gt;  - the Last Resolved Date &gt;= 07/19/2008</td>
<td>Bob performs an incident request review by searching incident requests registered against the services for which he is the problem coordinator.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> For the purpose of this example, assume today’s date is 11/19/2008. This means the date you use for the Last Resolved Date is, 07/19/2008— four months ago.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 After running the search, look for incident request records that have not yet been linked to a problem investigation and were resolved with a workaround.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Creating the problem investigation</strong>&lt;br&gt;1 From one of the incident request records that is related to the Payroll service search issue, click Create Problem from the Create Other Requests area in the Navigation pane. The Problem form appears. The incident record’s details are copied from the incident request record to the Problem form and a relationship is created between the problem investigation record and the incident request records.&lt;br&gt;2 Complete the Problem form.</td>
<td>Bob spots another trend—numerous incidents have been reported against the Payroll service related to the length of time it takes to run a search against the database. Bob creates a Problem Investigation record directly from one of the incident request records. Creating a problem investigation directly from an incident request record transfers all relevant information from the incident request and automatically establishes the relation between the incident request and the problem investigation.</td>
</tr>
</tbody>
</table>
### Table 3-8: Indicating a problem investigation at an impasse (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Problem Coordinator</strong></td>
<td><strong>Relating other records to the problem investigation</strong></td>
<td>Bob then relates the other incident requests to the problem investigation.</td>
</tr>
<tr>
<td></td>
<td>1 With the newly created problem investigation record still open, click the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Relationships tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Create relationships between the problem investigation and all of the related</td>
<td></td>
</tr>
<tr>
<td></td>
<td>incident requests.</td>
<td></td>
</tr>
<tr>
<td><strong>Assigning the problem investigation to the specialist</strong></td>
<td>1 With the newly created problem investigation record open, click the assignment tab.</td>
<td>After creating the problem investigation, Bob assigns it to Ian.</td>
</tr>
<tr>
<td></td>
<td>2 In the Problem Assignment area, assign the problem investigation to the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>specialist.</td>
<td></td>
</tr>
<tr>
<td><strong>Specialist</strong></td>
<td><strong>Accepting the assignment and performing the root cause analysis</strong></td>
<td>Ian accepts the problem investigation assignment and begins a root cause analysis. During the root cause analysis, he determines that the problem is with a defect in the database management software. Ian also determines that none of the database management software patches fixes this problem. The problem might be fixed in a future release.</td>
</tr>
<tr>
<td></td>
<td>1 Open the problem investigation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Set the problem investigation’s status to Under Investigation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Perform the root cause analysis.</td>
<td></td>
</tr>
<tr>
<td><strong>Notifying the problem coordinator</strong></td>
<td>1 On the Assignment tab of the problem investigation, ensure the Problem Manager Assignment Assignee field is set to the name of the problem coordinator.</td>
<td>Ian notifies Bob that he has completed the root cause analysis and determined the problem is with the database management software. He lets Bob know that, currently, there is no patch from the database software vendor to fix the problem.</td>
</tr>
<tr>
<td></td>
<td>2 From the Status field menu, select Assigned.</td>
<td></td>
</tr>
</tbody>
</table>
### Table 3-8: Indicating a problem investigation at an impasse (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks and actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem Coordinator</td>
<td><strong>Performing the analysis review</strong>&lt;br&gt;1. Open the problem investigation and click the Work Info tab to review the specialist’s work information entries. 2. Independently verify that the specialist’s assessment of the impasse is correct.</td>
<td>Bob performs an analysis review and double-checks that Ian’s assessment of the situation is correct.</td>
</tr>
<tr>
<td></td>
<td><strong>Indicating an impasse</strong>&lt;br&gt;1. On the Work Info tab of the problem investigation form, indicate why no further action can be taken against the investigation. 2. Change the problem investigation Status to Pending.</td>
<td>Because there is no current fix for the root cause available, Bob determines that the problem investigation is at an impasse.</td>
</tr>
<tr>
<td></td>
<td><strong>Performing periodic checks</strong>&lt;br&gt;1. Periodically, check the problem investigations with a status of Pending. 2. If a solution for the problem is now available, note this on the Work Info tab and reassign the problem investigation to a specialist for follow-up and implementation. 3. If a solution is still unavailable, also note this on the problem investigation’s Work Info tab and leave the status at Pending.</td>
<td>Bob performs periodic checks of all problem investigations with a status of Pending to determine if a solution has become recently available.</td>
</tr>
</tbody>
</table>
BMC Remedy Asset Management user scenarios

The following sections describe at a high-level common BMC Remedy Asset Management user scenarios that you typically encounter as IT support staff. The Calbro Services sample data is used to illustrate the user scenarios. For more detailed information about how to perform these procedures, see the BMC Remedy Asset Management User’s Guide.

The following user scenarios are provided:

- “Purchasing software and assigning a license” on page 93
- “Purchasing a laptop for a new employee” on page 96
- “Investigating inaccurate CI data” on page 99
- “Scheduling regular maintenance on a network printer” on page 100
- “Making sure that scheduled changes to CIs do not impact business services/ Scheduling mandatory unavailability for key services” on page 101

Purchasing software and assigning a license

Calbro Services has an enterprise license for Microsoft Office, which gives all employees access to Microsoft Word, Microsoft Excel, Microsoft Power Point, and Microsoft Outlook. However, because only a few people require Microsoft Visio, this software is purchased only as required.

Allen Allbrook is the Contract Manager for Calbro Services. He maintains the contracts for Microsoft products.

Joe Unser, who works in Human Resources, requires a copy of Microsoft Visio. Allen Allbrook, who is also the configuration administrator and software asset manager, orders Microsoft Visio.
Table 3-9 describes the typical steps involved in this user scenario.

**Table 3-9: Purchasing software and assigning a license**

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Manager</td>
<td><strong>Create contract for Microsoft Visio</strong></td>
<td>Allen Allbrook creates a contract for Microsoft Visio. Because this contract is managed by Backoffice Support, contract users (such as Bob Baxter) can add license certificates as they are purchased.</td>
</tr>
<tr>
<td></td>
<td>1 Log in to the Contract Management console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 In the Contract area, choose Create &gt; Software License.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 For the ID, enter Calbro MS Visio.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 For the Company, select Calbro Services.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 For the Term, select Never Ending.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 For the Status, select Executed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7 For Contract Managed By, select the Calbro Services, IT Support,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Backoffice Support.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8 Enter values for the other required fields, and click Save.</td>
<td></td>
</tr>
<tr>
<td>Configuration administrator</td>
<td><strong>Create purchase requisition for Microsoft Visio</strong></td>
<td>Allen Allbrook creates a purchase requisition for Microsoft Visio. The manager of the requester is the default approver of this purchase requisition.</td>
</tr>
<tr>
<td></td>
<td>1 Open the Purchasing console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Choose Functions &gt; Create Requisition.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Enter the required requisition details.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 On the Line Items tab, click Add.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 On the Line Item Information dialog box, for the Description, enter MS Visio.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 For the CI Type, select System Component &gt; Product.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7 Enter a Unit Price.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8 On the Details tab, select Software, Application, and Third Party for Tier 1, Tier 2, and Tier 3.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9 For the Product Name, select Microsoft Visio.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10 For the Model/Version field, select 2003.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>11 For the Supplier Name, enter EZnet.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12 Enter the other required Line Item Information and click Save.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13 On the Purchase Requisition form, click Submit for Approval.</td>
<td></td>
</tr>
</tbody>
</table>
### Purchase Requisition

**Purchasing agent**

1. Log in to the BMC Remedy AR System server as the approver.
2. Open Approval Central.
3. Select the purchase requisition.
4. Approve the purchase requisition.

**Note:** If no manager is assigned to the requester, you should assign a manager in the People form. For more information, see the *BMC Remedy IT Service Management Configuration Guide*.

### Purchase Order

**Create the purchase order**

1. Open the Purchasing console.
2. Set the Search Criteria to Orders to Place.
3. View, and then place the order.
4. Select the Place Order Using web services option, and then save the PO.

**After the purchase requisition is approved, a purchase order is automatically created and is ready to be placed with the vendor.**

### License Management

**Configuration administrator**

1. Log in to the Contract console.
2. View the Calbro MS Visio contract.
3. Click the License Details tab.
4. Click Add.
5. In the Create License Certificate wizard, select a License Type of Per Instance.
6. Click Search Line Item.
7. Click Search.
8. Select the appropriate line item, and click Relate.
9. Enter the other required fields, and click Next.
11. For the Product Categorization, select Software, Application, Third Party.
12. Click Next.
13. For the Number of licenses purchased, select 1.
14. Select the desired breach warning levels, and click Next.
15. Click Save.
16. On the Software Contract form, select the certificate that you just created and click View Certificate.
17. Change the status of the license certificate to Executed and click Save.

**The product and categorization that Allen selects for the license certificate match the product and categorization that are specified on the PO.**

**Note:** If Per Instance license types are not available, you must enable the Per Instance license type, as described in the *BMC Remedy IT Service Management Configuration Guide*.

Because only one copy was ordered, the license certificate is good for one copy. If Allen had ordered ten copies, he would have specified 10 in the Number of licenses purchased.

---

**Table 3-9: Purchasing software and assigning a license (Continued)**

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purchasing agent</strong></td>
<td><strong>Approving the purchase requisition</strong></td>
<td>The requester’s manager must approve the purchase requisition.</td>
</tr>
<tr>
<td></td>
<td>1. Log in to the BMC Remedy AR System server as the approver.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Open Approval Central.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Select the purchase requisition.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Approve the purchase requisition.</td>
<td></td>
</tr>
<tr>
<td><strong>Create the purchase order</strong></td>
<td>1. Open the Purchasing console.</td>
<td>After the purchase requisition is approved, a purchase order is automatically created and is ready to be placed with the vendor.</td>
</tr>
<tr>
<td></td>
<td>2. Set the Search Criteria to Orders to Place.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. View, and then place the order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Select the Place Order Using web services option, and then save the PO.</td>
<td></td>
</tr>
<tr>
<td><strong>Configuration administrator</strong></td>
<td><strong>Add a license certificate to the contract</strong></td>
<td>Allen Allbrook create a license certificate and links it to the purchase order line item.</td>
</tr>
<tr>
<td></td>
<td>1. Log in to the Contract console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. View the Calbro MS Visio contract.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Click the License Details tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Click Add.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. In the Create License Certificate wizard, select a License Type of Per Instance.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. Click Search Line Item.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7. Click Search.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8. Select the appropriate line item, and click Relate.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9. Enter the other required fields, and click Next.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>11. For the Product Categorization, select Software, Application, Third Party.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12. Click Next.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13. For the Number of licenses purchased, select 1.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>14. Select the desired breach warning levels, and click Next.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>15. Click Save.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>16. On the Software Contract form, select the certificate that you just created and click View Certificate.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>17. Change the status of the license certificate to Executed and click Save.</td>
<td></td>
</tr>
</tbody>
</table>
Purchasing a laptop for a new employee

Calbro Services are proud that new employees are fully functional on their first day of employment. Purchasing a laptop for a new employee is therefore a common task for the purchasing agent at Calbro Services. He must create a purchase requisition and place a purchase order (PO). When the PO is received, BMC Remedy Asset Management automatically generates a new CI and a change request.

The Change Manager can also create a “new employee” change request where one of the tasks is providing a fully configured laptop to new employees on the first day they start work at Calbro Services.

**NOTE**

BMC Remedy Asset Management and BMC Remedy Change Management must be installed to follow this user scenario. If you cannot find the correct CIs in the Calbro sample data, you must create a laptop CI and add it to the inventory to follow this user scenario. For more information about managing CI inventory, especially if you are adding bulk items, see the *BMC Remedy Asset Management User’s Guide*.

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Configuration Administrator | **Receive the item on the purchase order**  
1. Open the Receiving console.  
2. Search for the PO.  
3. Receive a quantity of one (1). | This action automatically creates a new CI. |
| Customer           | **Install the software** | After Joe Unser installs Microsoft Visio on his computer, discovery software discovers the software. During reconciliation, the CI, which previously had a status of Received, is set to a status of Deployed. |
| Contract Manager   | **Run a license job to assign the license**  
1. Open the Software Asset Management Console.  
2. In the navigation pane, choose Functions > Manage License Jobs.  
3. In the Manage License Jobs console, click Create.  
4. Enter a Job Name.  
5. Select a License Type of Per instance.  
6. Select a Job Type of All.  
7. Optionally, you can select additional job criteria.  
8. Click Save.  
If a broad license job is already scheduled to run nightly or upon reconciliation, Allen could skip this step. The license job connects the CI to the software license certificate. |

Table 3-9: Purchasing software and assigning a license (Continued)
Table 3-10 describes the typical steps involved in this user scenario.

### Table 3-10: Purchasing a laptop for a new employee

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Configuration administrator</strong></td>
<td><strong>Create purchase requisition</strong></td>
<td>Allen Allbrook, the manager of the requester is the default approver of this purchase requisition. Using a change template automatically creates a change request when the ordered laptop is received.</td>
</tr>
<tr>
<td></td>
<td>1 Log in to the Purchasing console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Choose Functions &gt; Create Requisition.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Enter the required requisition details.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 Choose Yes for Install Needed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 From the Change Template menu, choose Configure New Computer (Calbro Services &gt; IT Support &gt; Service Desk &gt; Configure New Computer).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 Click Select Configuration to make sure there is enough inventory.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7 Click Check Inventory to view all the items in the inventory.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8 Select the computer system, and then click View Inventory.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9 Close the Inventory window.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10 Click Add to Requisition.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>11 Click Save.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12 Click Submit for Approval.</td>
<td></td>
</tr>
<tr>
<td><strong>Purchasing agent</strong></td>
<td><strong>Approve the purchase requisition</strong></td>
<td>The requester’s manager must approve the purchase requisition.</td>
</tr>
<tr>
<td></td>
<td>1 Log in to the BMC Remedy AR System server as the approver.</td>
<td><strong>Note:</strong> If no manager is assigned to the requester, you should assign a manager in the People form. For more information, see the <strong>BMC Remedy IT Service Management Configuration Guide</strong>.</td>
</tr>
<tr>
<td></td>
<td>2 Open Approval Central.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Approve the purchase requisition.</td>
<td></td>
</tr>
<tr>
<td><strong>Create the purchase order</strong></td>
<td><strong>Create the purchase order</strong></td>
<td>After the purchase requisition is approved, a purchase order is automatically created and is ready to be placed with the vendor.</td>
</tr>
<tr>
<td></td>
<td>1 Open the Purchasing console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Set the Search Criteria to Orders to Place.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 View, and then place the order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 Select the Place Order Using web services option, and then save the PO.</td>
<td></td>
</tr>
<tr>
<td><strong>Configuration administrator</strong></td>
<td><strong>Receive the item on the purchase order</strong></td>
<td>This action automatically creates a new CI. If your system is properly configured, a new change request is also created.</td>
</tr>
<tr>
<td></td>
<td>1 Open the Receiving console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Search for the PO.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Receive a quantity of one (1).</td>
<td></td>
</tr>
</tbody>
</table>
Table 3-10: Purchasing a laptop for a new employee (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purchasing agent</strong></td>
<td><strong>View the new CI</strong>&lt;br&gt;1. Open the Asset Management console.&lt;br&gt;2. Search for all computers with a status of Received.&lt;br&gt;3. Find the laptop CI.&lt;br&gt;4. View the CI details.&lt;br&gt;5. Click the Financials tab.</td>
<td>The original purchase requisition is automatically related to this CI. <strong>Note:</strong> If the purchasing agent does not have access to the Asset Management console, a configuration administrator can view the CI.</td>
</tr>
<tr>
<td><strong>Change Manager</strong></td>
<td><strong>View the change request</strong>&lt;br&gt;1. Log in to the Change Management console with Change Manager permissions.&lt;br&gt;2. Search for All Open Changes.&lt;br&gt;3. View the change request for the new laptop.</td>
<td>Mary Mann is the Change Manager for Calbro Services. She views all open Change Requests in the Manager Console view. For more information about using BMC Remedy Change Management, see the <em>BMC Remedy Change Management User’s Guide</em>.</td>
</tr>
<tr>
<td></td>
<td><strong>Schedule the change request and perform risk assessment</strong>&lt;br&gt;1. In the Change form, choose Quick Links &gt; View Calendar.&lt;br&gt;2. Close the calendar when you finish.&lt;br&gt;3. Click the Risk Level icon next to the Risk Level menu.&lt;br&gt;4. Define the risk level of the change request.</td>
<td>Mary opens the Change Calendar to see if there are any conflicting change requests or business events. Although the Risk Level had a predefined value, she can perform Risk Assessment to formalize the Risk Level. This type of change request is pre-approved and does not require any formal approvals.</td>
</tr>
<tr>
<td></td>
<td><strong>Create task and add start and end dates</strong>&lt;br&gt;1. Use the Process Flow Status bar to move the change request through the various stages to the Plan &amp; Schedule stage.&lt;br&gt;2. Click the Task tab.&lt;br&gt;3. Select the Task Template Request Type, and then click Relate.&lt;br&gt;4. Relate the Install Laptop task template to the change request.&lt;br&gt;5. View the task, and then assign it to the task implementer who is part of Calbro’s Backoffice Support Staff.&lt;br&gt;6. Use the Process Flow Status bar to move the change request forward to Scheduled for Review status.&lt;br&gt;7. Enter the scheduled start and end dates.&lt;br&gt;8. Move the change request forward to the Implement stage.</td>
<td>Mary creates a task to install or configure the laptop and assigns the task to the task implementer. When the change request reaches the Implement stage, the task moves to Assigned status and the task implementer can start working on the task.</td>
</tr>
</tbody>
</table>
Investigating inaccurate CI data

CI data is used by IT personnel throughout Calbro Services. Configuration administrators use CI data for most tasks. Change managers analyze the CIs and its relationships before implementing changes. Service Desk personnel use CI data to help resolve incident requests and investigate problems. Accurate CI data is important to their work.

Allen Allbrook, a configuration administrator at Calbro Services, thinks that the data for a computer system might be inaccurate. He wants to view the audit history of the CI, so that he can see all the modifications to this computer system during its history. He can investigate why the data is no longer accurate.

Table 3-11 describes the typical steps involved in this user scenario.

Table 3-11: Tracking inaccurate CI data

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration administrator</td>
<td><strong>Check audit history for a CI</strong></td>
<td>Allen Allbrook is the configuration administrator for Calbro Services. Typically, he accesses data stored in BMC Atrium CMDB from the Asset Management console.</td>
</tr>
<tr>
<td></td>
<td>1. Log in to the Asset Management console with Asset User or Asset Administrator permissions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Search for the CI.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Select the CI, and click View.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Choose Functions &gt; CMDB Audits.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. To see details of a history entry, select the history entry, and click View.</td>
<td></td>
</tr>
</tbody>
</table>
Scheduling regular maintenance on a network printer

**NOTE**
Not all data for this example is included with the sample data. You must create the Asset Maintenance change type template and the network printer CI.

Calbro Services has a high-speed high-volume network printer on each floor of its offices. These printers require maintenance every six months. The configuration administrator, Allen Allbrook, sets up a maintenance schedule for each of these printers.

Allen selects a “network printer maintenance” change template, so that the appropriate change request is started when maintenance is scheduled. Because this is a pre-approved change, no approval is required, and a technician performs the scheduled work.

After completing the maintenance tasks, the technician changes the status of the schedule to completed.

**NOTE**
BMC Remedy Asset Management and BMC Remedy Change Management must be installed to follow this user scenario.

Table 3-12 describes the typical steps involved in this user scenario.

<table>
<thead>
<tr>
<th>Role and task</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration administrator</td>
<td>Create maintenance schedule for network printer</td>
<td>Allen Allbrook, the Calbro configuration administrator needs IT personnel to perform maintenance every six months on a network printer. He sets up a maintenance schedule, selects the change template, and selects the network printers.</td>
</tr>
<tr>
<td></td>
<td>1 Open the Asset Management console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Choose Functions &gt; Schedules.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Click New Schedule.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 Enter the information required to create the new maintenance schedule:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Schedule Type—Maintenance Schedule</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Name—Network Printer Maintenance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Frequency and Period—Every six months.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Change Template—Network Printer Maintenance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Select the network printer.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Select the categorization: Hardware, Printer, Network</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Select the maintenance criteria (for example, Printer as CI Type)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 Click Add.</td>
<td></td>
</tr>
</tbody>
</table>
Making sure that scheduled changes to CIs do not impact business services/Scheduling mandatory unavailability for key services

The Finance department at Calbro Services processes payroll checks every Thursday. Allen Allbrook, the configuration administrator, wants to make sure that neither the payroll server nor the payroll printer are taken down for maintenance on Thursdays. He sets two blackout schedules to accomplish this—these key services are unavailable for maintenance on any Thursday.

The payroll server is having performance issues and needs more memory. When Mary Mann, the change manager, schedules the change request, she sees that the payroll server is unavailable on Thursday. To prevent conflicts, she creates another unavailable time segment, on Monday instead of Thursday.

The Calbro business process has predefined that this type of change request requires standard approvals to move the project forward.

Table 3-12: Scheduling regular maintenance (Continued)

<table>
<thead>
<tr>
<th>Role and task</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Technician    | **Complete change request to perform maintenance**  
1. You receive an alert that a change request is assigned to you (through email, alert, or page).  
2. Open the Change Management Support Console.  
3. Open the change request.  
4. Relate an ad hoc task to the change request.  
5. Use the Process Flow Status bar to move the change through its lifecycle.  
6. Complete and close the maintenance task during the Implementation stage.  
7. Close the change request. | When the maintenance schedule comes due, the Asset Maintenance change template is used to create the change request. This template assigns the change request to the correct technician and notifies the technician to complete the maintenance every six months. The technician completes the change request. For more information, see the *BMC Remedy Change Management User’s Guide*. |
| Technician    | **Indicate that maintenance is complete**  
1. Open the Asset Management console.  
2. Search for the network printer CI.  
3. Choose Functions > Schedule.  
4. Select Network Printer Maintenance and click View.  
5. Change the Status field to Completed, and click Save. | The technician indicates that the maintenance is complete. |
Table 3-13 describes the typical steps involved in this user scenario.

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset manager</td>
<td><strong>Create unavailability blackout schedules for the payroll server and payroll printer</strong>&lt;br&gt;1 Open the Asset Management console.&lt;br&gt;2 Choose General Functions &gt; Manage CIs.&lt;br&gt;3 Search for the server CI.&lt;br&gt;4 Choose Advanced Functions &gt; Blackout Schedules.&lt;br&gt;5 Add a business time segment.&lt;br&gt;6 Specify the server CI to be Unavailable.&lt;br&gt;7 Specify Recurring as the Duration Type.&lt;br&gt;8 Specify your daily start and end date and times (for example, End of Day).&lt;br&gt;9 Set Weekly Frequency to 1 (every week) on Thursday.&lt;br&gt;10 Click Save to create the business time segment.&lt;br&gt;11 Finish the time segment.</td>
<td>Allen specifies that the payroll server and printer server CIs are unavailable every Thursday for maintenance. During this blackout, these CIs must not be brought down.</td>
</tr>
<tr>
<td>Change manager</td>
<td><strong>Create change request, using a change template</strong>&lt;br&gt;1 Log in to the Change Management console with change manager permissions.&lt;br&gt;2 Choose General Functions &gt; New Change.&lt;br&gt;3 In the Change form, choose Quick Links &gt; Select Template.&lt;br&gt;4 Select the Upgrade Server Hard Drive template.&lt;br&gt;5 Enter the required information to finish creating the change request.&lt;br&gt;6 Save the change request.</td>
<td>Mary uses a predefined change template that supports the business process and accelerates the change request process. It prepopulates fields on the change request with information.</td>
</tr>
</tbody>
</table>
### BMC Remedy Asset Management user scenarios

#### Change manager

**View calendar and perform risk assessment**
1. Use the Process Flow Status bar to move the request to the Planning In Progress status.
2. In the Change form, choose Quick Links > View Calendar.
3. In the Change form, click the Risk Level icon next to the Risk Level menu.

Mary opens the Change Calendar to see if there are any conflicting change requests or business events. Although the Risk Level had a predefined value, she performs Risk Assessment to formalize the Risk Level.

**Relate CI to change**
1. Click the Relationships tab.
2. Search for the server CI.
3. Specify the Relationship Type as Upgrades.
4. Click Relate with Unavailability.
5. In the Configuration Item Unavailability dialog box, specify the Unavailability Type (for example, Scheduled Full).
6. Enter the scheduled start and end dates, and then click Save.
7. Close the CI Relationship Search dialog box.

Mary creates a server CI unavailability that is related to the change request.

**Search for available times to schedule change request**
1. Click the Dates tab.
2. Use the Schedule Assist tool to search for available times.
3. View the times when the server CI is unavailable.
4. Enter a time duration to upgrade the server.
5. Enter the available start time.
6. Click Find Next Avail Time.
7. Click Schedule Time Segment.
8. Enter a description for the associated CI, and click Create Time Segment.
9. Close the Associate CIs to Time Segment dialog box.
10. Click Next.
11. Enter scheduled start and end date and times.
12. Click Next.

Mary finds the next available time to upgrade the payroll server. She schedules the CI unavailability on Monday to avoid conflicts with the Thursday blackout schedule.

---

**Table 3-13: Scheduling mandatory unavailability for key services (Continued)**

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change manager</td>
<td><strong>View calendar and perform risk assessment</strong></td>
<td>Mary opens the Change Calendar to see if there are any conflicting change requests or business events. Although the Risk Level had a predefined value, she performs Risk Assessment to formalize the Risk Level.</td>
</tr>
</tbody>
</table>
|                 | 1. Use the Process Flow Status bar to move the request to the Planning In Progress status.  
|                 | 2. In the Change form, choose Quick Links > View Calendar.  
|                 | 3. In the Change form, click the Risk Level icon next to the Risk Level menu. |                                                                                                                                              |
|                 | **Relate CI to change**                                                  | Mary creates a server CI unavailability that is related to the change request.                                                              |
|                 | 1. Click the Relationships tab.                                           |                                                                                                                                              |
|                 | 2. Search for the server CI.                                              |                                                                                                                                              |
|                 | 3. Specify the Relationship Type as Upgrades.                            |                                                                                                                                              |
|                 | 4. Click Relate with Unavailability.                                      |                                                                                                                                              |
|                 | 5. In the Configuration Item Unavailability dialog box, specify the Unavailability Type (for example, Scheduled Full). |                                                                                                                                              |
|                 | 6. Enter the scheduled start and end dates, and then click Save.          |                                                                                                                                              |
|                 | 7. Close the CI Relationship Search dialog box.                           |                                                                                                                                              |
|                 | **Search for available times to schedule change request**                | Mary finds the next available time to upgrade the payroll server. She schedules the CI unavailability on Monday to avoid conflicts with the Thursday blackout schedule. |
|                 | 1. Click the Dates tab.                                                   |                                                                                                                                              |
|                 | 2. Use the Schedule Assist tool to search for available times.            |                                                                                                                                              |
|                 | 3. View the times when the server CI is unavailable.                      |                                                                                                                                              |
|                 | 4. Enter a time duration to upgrade the server.                           |                                                                                                                                              |
|                 | 5. Enter the available start time.                                        |                                                                                                                                              |
|                 | 6. Click Find Next Avail Time.                                            |                                                                                                                                              |
|                 | 7. Click Schedule Time Segment.                                           |                                                                                                                                              |
|                 | 8. Enter a description for the associated CI, and click Create Time Segment. |                                                                                                                                              |
|                 | 9. Close the Associate CIs to Time Segment dialog box.                    |                                                                                                                                              |
|                 | 10. Click Next.                                                          |                                                                                                                                              |
|                 | 11. Enter scheduled start and end date and times.                         |                                                                                                                                              |
|                 | 12. Click Next.                                                          |                                                                                                                                              |
Change manager

Create unavailability blackout schedules to fix the payroll server
1. Open the Change Management console.
2. Choose Advanced Functions > Manage CIs.
3. Search for the server CI.
5. Add a business time segment.
6. Specify the server CI to be Unavailable on some day other than Thursday (for example, Monday).
7. Specify the One Time duration type.
8. Specify the start and end date and times, and click Save.
9. Finish the time segment.
10. Use the Process Flow Status bar to move the request to the Implementation Approval phase.

Mary creates a blackout schedule to upgrade the server CI.

Change approver

Approve change request
1. Log in to the Change Management console as the change approver.
2. Open the Install Server Hard Drive change request.
3. Click the Approvers tab.
4. Click Approve.

Allen Allbrook must approve the change to move it forward to the Scheduled status.

Task implementer

Add server CI to the task and execute tasks
1. Open the Change Management Support Console.
2. Use Quick Actions to set the task as the primary table, and then execute the action.
3. Open and execute each of the three Upgrade Server Hard Drive tasks.
4. Save your work.

Task implementers must complete all three tasks successfully before the change request can be closed.

Change manager

Complete change request
1. Use the Process Flow Status bar to move the request to the Closed stage.
2. Enter the performance rating and the actual start and end date.

Mary completes and closes the change request. She enters the performance rating and start and end dates.
BMC Remedy Change Management user scenarios

The following sections describe at a high-level common BMC Remedy Change Management user scenarios that you typically encounter as IT support staff. The Calbro Services sample data is used to illustrate the user scenarios. For more detailed information about how to perform these procedures, see the BMC Remedy Change Management User’s Guide.

The following user scenarios are provided:

- “Adding laptop memory” on page 105
- “Upgrading server hardware” on page 108
- “Releasing a new software program” on page 112

Adding laptop memory

Joe Unser is an employee at Calbro Services. To improve the performance of his laptop, he needs 3 GB additional memory added. He submits a request to install memory for his laptop.

The Calbro Services business process has predefined that this type of change request does not require the standard Review and Business Approval processes. Mary Mann, the change manager, schedules and plans the change request. Ian Plyment, who is part of Mary’s Front Office Support team, implements the change request.
Table 3-14 describes the typical steps involved in this user scenario.

### Table 3-14: Adding laptop memory

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td><strong>Create service request</strong> 1 Log in to the Requester console. 2 Click Create a New Request. 3 Use the Summary menu to select Install Hardware. 4 Enter additional information as needed. 5 Save your work. 6 Click Refresh to retrieve the Request ID.</td>
<td>The business user uses the predefined menus to select the appropriate item and enter more information. His selection drives the predefined process to create the Change Request.                                                                                           Note: If BMC Service Request Management is installed, you must create this service request from the Request Entry Console.</td>
</tr>
<tr>
<td>Change manager</td>
<td><strong>View change request</strong> 1 Log in to the Change Management Console with change manager permissions. 2 Use the Defined Searches area in the left navigation pane to view All Open Changes. 3 View the Install Hardware change request.</td>
<td>The change manager views all open Change Requests in the Manager Console view. This type of change request involves minimal risk. This request is pre-approved and does not require any formal approvals.</td>
</tr>
<tr>
<td>Change manager</td>
<td><strong>Schedule change request</strong> 1 Choose Quick Links &gt; View Calendar to view possible conflicts. 2 Click the Dates tab in the change request. 3 Enter the scheduled start and end dates. 4 Move the change request forward to the next status. 5 If you reach an approval phase, click the Approvers tab to review the list of approvers.</td>
<td>The change manager opens the Change Calendar to see if there are any conflicting change requests or business events. She then schedules the change request.</td>
</tr>
<tr>
<td>Change approver</td>
<td><strong>Approve change request at implementation approval phase</strong> 1 As the approver, log in to the IT Home Page. 2 Open Approval Central. 3 Approve the change request.</td>
<td>If approvers are mapped to any approval phases, the change approver must approve the change to move it forward. Otherwise, the change manager can refresh the change request to move it to the next status.</td>
</tr>
</tbody>
</table>
### Change assignee

**Create tasks.**
1. Log in to the Change Management Console.
2. Use the Defined Searches area in the left navigation pane to view All Open Changes.
3. Open the change request.
4. Use the Process Flow Status bar to move the request to Implementation In Progress status.
5. Click the Task tab.
6. Relate the Install Memory task.
7. View the task, and make sure it is assigned to the task implementer (Ian Plyment).

**Explanation:** The change assignee creates a task to add the laptop memory and assigns the task to the task implementer.

---

### Change assignee

**Relate CI to change**
1. Click the Relationship tab in the change request.
2. Search for the laptop CI and relate it to the change request. Use the Installs relationship type.
3. Choose Advanced > Collision Detection to check if there are other change requests scheduled to work on the same CI.

**Explanation:** The change assignee relates the CI to the change and runs the Collision Detection tool. He then creates a task to add the laptop memory and assigns the task to the task implementer.
Calbro Services has discovered that a mission-critical server is almost reaching capacity. They must replace the current server with a model that has more capacity. Mary Mann, the change manager, schedules and plans the change request. Ian Plyment, who part of Mary’s Front Office Support team, then implements the tasks in the change request.

The Calbro business process has predefined that this type of change request requires standard approvals to move the project forward.

Table 3-15 describes the typical steps involved in this user scenario.

Table 3-14: Adding laptop memory (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task implementer</td>
<td><strong>Execute task</strong></td>
<td>In the Implement stage, the task moves to Assigned status and the task implementer can start working on the task. When the task implementer finishes the task, its status is set to Closed. The change manager can now close the change request.</td>
</tr>
<tr>
<td></td>
<td>1. Open the Change Management Support Console.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Use Quick Actions to set the task as the primary table, and then execute the action.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. View the task.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Change the status of the task to Work in Progress, and click Save.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Enter the actual start and end dates of the task. Optionally, you can enter the time spent on the task, and relevant work information.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. Change the status of the task to Closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7. Click Save.</td>
<td></td>
</tr>
<tr>
<td>Change manager</td>
<td><strong>Complete change request</strong></td>
<td>Change manager completes and closes the change request. Enter performance rating and start and end dates.</td>
</tr>
<tr>
<td></td>
<td>1. Open the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Use the Process Flow Status bar to move the request to the Closed stage.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. If prompted, enter the performance rating and the actual start and end date of the change request.</td>
<td></td>
</tr>
</tbody>
</table>
## Table 3-15: Upgrading server hardware

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change manager</strong></td>
<td><strong>Create change request from Atrium Impact Simulator</strong></td>
<td>The change manager runs a simulated impact analysis on the CI. She verifies the devices and applications in the network would be affected if she takes the server offline. Mary then creates a change request from the Atrium Impact Simulator. The CI is automatically related to the change request.</td>
</tr>
<tr>
<td></td>
<td>1. Log in to the Change Management console with change manager permissions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Choose Advanced Functions &gt; Atrium Impact Simulator.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Click Add CI to search for and select CIs to add to the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Click Simulate Impact to run an impact simulation for the CIs in the table.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. To create a new change request, choose Relate to New &gt; Change Request.</td>
<td></td>
</tr>
<tr>
<td><strong>Change manager</strong></td>
<td><strong>Use change template</strong></td>
<td>The change manager uses a predefined change template that supports the business process and accelerates the change request process. It prepopulates fields on the change request with information. This change template also includes a predefined Task Group template (Upgrade Server Hard Drive). The Task Group template contain three predefined Tasks Templates that are individual work items.</td>
</tr>
<tr>
<td></td>
<td>1. In the Change form, choose Quick Links &gt; Select Template.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Select the Install Server Hard Drive template.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. In the Initiate stage of the Process Flow Status bar, click the arrow and choose Next Stage.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Enter the required information to finish creating the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Save the change request.</td>
<td></td>
</tr>
<tr>
<td><strong>Change manager</strong></td>
<td><strong>Schedule change request and run collision detection</strong></td>
<td>The change manager opens the Change Calendar to see if there are any conflicting change requests or business events. She uses the Schedule Assist tool to schedule the start and end dates. Mary then determines if this change request collides with other changes.</td>
</tr>
<tr>
<td></td>
<td>1. Choose Quick Links &gt; View Calendar to view possible conflicts.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Click the Dates tab in the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Enter the scheduled start and end dates.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. <em>(optional)</em> Use Schedule Assist tool to search for available times.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Click Advanced &gt; Collision Detection to view if there are other change requests scheduled to work on the CI at the same time.</td>
<td></td>
</tr>
</tbody>
</table>
### Change manager

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
</table>
|                  | **Review task assignments**                                            | 1 Click the Task tab in the change request.  
|                  |                                                                          | 2 Relate the Upgrade Server Hard Drive task group template to the change request, and then click View to view the details of the task (for example, assignments).  
|                  |                                                                          | 3 Click View Flow to see a read-only view of the task flow in the task group.  
|                  |                                                                          | 4 Use the Process Flow Status bar to move the request to the Scheduled For Review Status.  
|                  |                                                                          | 5 If you reach an approval phase, click the Approvers tab to review the list of approvers.                                                 |
|                  | **Approve change request**                                             | If approvers are mapped to any approval phases, the change approver must approve the change to move it forward. Otherwise, the change manager can refresh the change request to move it to the next status. |
|                  | **Move change request forward**                                        | When the change request reaches the Implement stage, the task moves to Assigned status and the task implementer can start working on the first task. |
| **Change approver** | **Approve change request**                                             | If approvers are mapped to any approval phases, the change approver must approve the change to move it forward. Otherwise, the change manager can refresh the change request to move it to the next status. |
|                  | **Review task assignments**                                            | The change manager reviews the task and task assignments. She then views the tasks relates to the change request and makes adjustments if needed. A predefined process is already set up for this type of change, which speeds the planning and process. Mary sees that Ian Plyment has been predefined as the task implementer assigned to work on this change. Mary has additional opportunity to review change plans, schedules, and so on. |

### Table 3-15: Upgrading server hardware (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
</table>
|                  | **Review task assignments**                                            | 1 Click the Task tab in the change request.  
|                  |                                                                          | 2 Relate the Upgrade Server Hard Drive task group template to the change request, and then click View to view the details of the task (for example, assignments).  
|                  |                                                                          | 3 Click View Flow to see a read-only view of the task flow in the task group.  
|                  |                                                                          | 4 Use the Process Flow Status bar to move the request to the Scheduled For Review Status.  
|                  |                                                                          | 5 If you reach an approval phase, click the Approvers tab to review the list of approvers.                                                 |
|                  | **Approve change request**                                             | If approvers are mapped to any approval phases, the change approver must approve the change to move it forward. Otherwise, the change manager can refresh the change request to move it to the next status. |
|                  | **Move change request forward**                                        | When the change request reaches the Implement stage, the task moves to Assigned status and the task implementer can start working on the first task. |
### BMC Remedy Change Management user scenarios

#### Chapter 3 User Scenarios

**Task implementer**

- **Execute Backup System task**
  1. Log in to the Change Management Support Console.
  2. Use Quick Actions to set the task as the primary table, and then execute the action.
  3. View the Backup System task.
  4. Change the status of the task to Work In Progress.
  5. Click the Relationships tab.
  6. Search for server CI, and then relate it to the task.
  7. Select Target as the Relationship Attribute, press Apply, and then press Close.
  8. Enter the actual start and end dates, the time spent on the task, and relevant work information.
  9. Update the status to Closed.
  10. Save and close the task.

The task implementer opens the first task in the task group, relates the server CI to it, and then completes the task.

#### Task implementer

- **Execute Uninstall Hard Drive task**
  1. View the Uninstall Hard Drive task.
  2. Update the status, relate the server CI, and so on.
  3. Save and close the task when you are finished.

The task implementer opens the second task, relates the server CI to it, and then completes the task.

#### Task implementer

- **Execute Install Hard Drive task**
  1. View the Install Hard Drive task.
  2. Update the status, relate the server CI, and so on.
  3. Save and close the task when you are finished.

The task implementer opens the third task, relates the server CI to it, and then completes the task. When the last task is closed, the status of the Upgrade Server Hard Drive task group changes to Closed.

#### Change manager

- **Complete change request**
  1. Open the change request.
  2. Use the Process Flow Status bar to move the request to the Closed stage.
  3. Enter the performance rating and the actual start and end date.

The change manager completes and closes the change request. She enters the performance rating and start and end dates.
**Releasing a new software program**

Allen Allbrook, the release manager, has created a request to release a new version of the new payroll service. This release is composed of two work items to be rolled out during the Deployment milestone:

- Install a new server. Allen creates a change request to include in the release manifest.

- Train the users on the new payroll service. Since this work item is not a change request that needs to be completed by the Change Management team, Allen instead creates an Activity as part of the manifest.

Depending on how your application administrator has configured phases and exit criteria, the activity and change must be completed in the Deployment milestone before the release request can be closed.

Table 3-16 describes the typical steps involved in this user scenario.

**Table 3-16: Releasing a new software program**

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Manager</td>
<td><strong>Create release request</strong></td>
<td>Allen creates a new request to add a new Payroll Service and would like it by September 1, 2008. Release starts at the Initiate milestone. The service will be released in multiple phases.</td>
</tr>
<tr>
<td></td>
<td>1 Log in to the Release Management console with Release Manager permissions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Choose Functions &gt; New Release.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 In the Release form, enter the required information to create the release request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 Save the release request.</td>
<td></td>
</tr>
<tr>
<td>Release Manager</td>
<td><strong>Create change request</strong></td>
<td>Allen creates a change request to install the payroll service on a new server as part of the release manifest.</td>
</tr>
<tr>
<td></td>
<td>1 In the Initiate milestone of the Process Flow Status bar, click the arrow and choose Action &gt; Create a New Change.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Complete all the required information.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Assign the change to the change manager (Mary Mann).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 Relate the Install Server task to the change request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Save the request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 Assign the activity to the Deployment Milestone.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7 Click the Manifest tab to view the change request.</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 3  User Scenarios  113

Table 3-16: Releasing a new software program (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Manager</td>
<td>Create activity</td>
<td>Allen creates an activity to train employees on the new payroll service as part of the release manifest.</td>
</tr>
<tr>
<td></td>
<td>1. In the Initiate milestone of the Process Flow Status bar, click the arrow and choose Action &gt; Create a New Activity.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Complete all the required information.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Assign the activity to Francie Stafford.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Save your work.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Assign the activity to the Deployment Milestone.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. Click the Manifest tab to view the activity.</td>
<td></td>
</tr>
<tr>
<td>Release Manager</td>
<td>Add start and end dates and run collision detection</td>
<td>Allen schedules the change request. He then runs the Collision Detection tool to see if there are any conflicting change requests.</td>
</tr>
<tr>
<td></td>
<td>1. Choose Advanced &gt; Collision Detection to check if there are other change requests scheduled to work on the same CI.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Click the Dates tab in the release request.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Enter scheduled, actual, and deployment start and end dates.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Click Schedule Assist tool to search for available time segments.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Use the Process Flow Status bar to move the release request forward.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. If you reach an approval phase, click the Approvers tab to review the list of approvers.</td>
<td></td>
</tr>
<tr>
<td>Release Approver</td>
<td>Approve release request at the Initiate approval milestone</td>
<td>If approvers are mapped to any approval phases, the release approver must approve the release to move it forward. Otherwise, refresh the release request to move it to the next status.</td>
</tr>
<tr>
<td></td>
<td>1. Log in to Approval Central console as the Release Approver.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Approve the release request.</td>
<td></td>
</tr>
<tr>
<td>Release Manager</td>
<td>Move release forward</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Use the Process Flow Status bar to move the release request to the Planning milestone.</td>
<td></td>
</tr>
</tbody>
</table>
Use the Process Flow Status bar to move the release request to Planning milestone and Status is In Progress.

Choose Quick Links > View Calendar.

Make sure Release Requests are shown in the calendar.

Close the calendar when you finish.

Click the Dates tab.

Adjust scheduled start and end dates.

Allen opens the Change Calendar to see if there are any conflicting releases, change requests, or business events.

Activity is routed to the Francie Stafford, the activity assignee.

Francie schedules a training session on how to use the new payroll application.

Francie creates tasks to assign the trainers to train Calbro users in Boston, Tokyo, and so on.

Francie adds financial and scheduling information to the activity.

Allen oversees assembly of CIs needed to create new payroll service.

Allen oversees the release request, and updates information as needed.

Allen oversees the testing of the new service, to make sure that the CIs, IT service, or process meet the specifications and requirements.
### Table 3-16: Releasing a new software program (Continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Manager</td>
<td><strong>Deploy release</strong>&lt;br&gt;1. Use the Process Flow Status bar to move the release request to Deployment milestone.</td>
<td>Phased deployment of the new service can start.</td>
</tr>
<tr>
<td>Change Manager</td>
<td><strong>Work on change request</strong>&lt;br&gt;1. Open the change request.&lt;br&gt;2. Use the Process Flow Status bar to move the change request to Implement stage.&lt;br&gt;3. Click Tasks tab.&lt;br&gt;4. Relate a task to the change.&lt;br&gt;5. Assign task to Task Implementer.</td>
<td>In the Deployment milestone, the change manager works the change request through its stages.</td>
</tr>
<tr>
<td>Task Implementer</td>
<td><strong>Execute task</strong>&lt;br&gt;1. Open the Change Management Support Console.&lt;br&gt;2. Use Quick Actions to set task as the primary table, and then execute the action.&lt;br&gt;3. Open and execute the install server task.&lt;br&gt;4. Enter the actual start and end dates, the time spent on the task, and relevant work information.&lt;br&gt;5. Change the status of the task to Closed.&lt;br&gt;6. Save your work.</td>
<td>In the Deployment milestone, the task moves to Assigned status and the task implementer can start installing the server. Ian Plyment the task implementer completes the task.</td>
</tr>
<tr>
<td>Change Assignee</td>
<td><strong>Complete change request</strong>&lt;br&gt;1. Open the change request.&lt;br&gt;2. Use the Process Flow Status bar to move the change request to Completed status.</td>
<td>Mary completes the change request to install the server.</td>
</tr>
</tbody>
</table>
Log in to the Release Management console with Activity User permissions.
2 Open the activity.
3 Click the Tasks tab.
4 View the status of the assigned tasks.
5 Change the status of the activity to Completed when all the training tasks are finished.
6 Save your work.

Complete the release
1 Use the Process Flow Status bar to move the release request to Close Down milestone.

In the Deployment milestone, the trainers can start training users at different Calbro locations.
Training task has its own independent lifecycle and continues on its own path. But all tasks must be finished in order for the activity to be completed.

Allen completes and closes the release request.

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Assignee</td>
<td><strong>Execute activity</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1 Log in to the Release Management console with Activity User permissions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Open the activity.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Click the Tasks tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 View the status of the assigned tasks.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Change the status of the activity to Completed when all the training tasks are finished.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 Save your work.</td>
<td></td>
</tr>
<tr>
<td>Release Manager</td>
<td><strong>Complete the release</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1 Use the Process Flow Status bar to move the release request to Close Down milestone.</td>
<td></td>
</tr>
</tbody>
</table>
Glossary

accelerated depreciation
Any method of depreciation that allows greater deductions in the earlier years of a CI’s life cycle. See also depreciation and configuration item (CI).

access permission
See permission group.

activity system
BMC Remedy ITSM subsystem used in the Release Management module that provides the capability to assign specific units of work known as activities. An activity has its own status transition lifecycle but does not require approvals.

administrator
See application administrator.

Administration console
See Application Administration console.

application administrator
An individual responsible for the management of the BMC Remedy ITSM applications, including setting up forms, setting access rights for users, and creating configurations.

Application Administration console
The main interface for configuring BMC Remedy ITSM applications. The console works like a control panel from which administrators can perform common configuration activities and activities specific to different BMC Remedy ITSM applications and modules.

approval
A process that generates electronic signature lines for items that require approval, and tracks who has approved or rejected a given request.

approver
Approvers use BMC Remedy Asset Management to approve or reject requests for the acquisition of new items and for proposed standard configurations. Approvers use BMC Remedy Change Management to approve or rejects change requests.

asset manager
See configuration administrator.

assignee
The person assigned the responsibility of working on any of the following activities: change request, incident ticket, problem investigation, known error, solution database entry, and so on.

assignment
Automatically or manually assigning a group or individual the responsibility of resolving an issue or request. BMC Remedy ITSM applications use the Assignment form for group automatic assignment and the Assignment Engine for individual automatic assignment.

Atrium Explorer
Enables you search for and view a CIs and its relationships.

Atrium Impact Simulator
Helps you to determine how a change to the availability of an item represented by a CI affects other items.
audit schedule
A schedule used to perform periodic audits that check for differences between the information in the CI database and the CIs that are deployed in the company.

availability service target
A service target that measures the time that an asset or service is available or unavailable. This service target applies specifically to data that is tracked in an application based on AR System, such as Asset Management.

blackout schedule
Scheduled times that when a CI is either unavailable for maintenance (must be operational) or is available for maintenance.

BMC Atrium Configuration Management Database (BMC Atrium CMDB)
An infrastructure built on AR System and used to build data models and define datasets.

book value
The value of a CI equal to the purchase cost minus the accumulated depreciation.

broadcast message
An application feature that enables users to create messages that can be viewed by the entire organization or by users in specific groups.

BSM
See business service management (BSM).

bulk inventory
Assets that you order in quantity, such as power cables.

bulk items
Items that are not tracked by an individual record for each unit. Bulk items in inventory are tracked by quantities of an item type. For example, items such as cables do not require individual records but rather, one record for a bulk quantity of the specific cable type.

business service management (BSM)
A flexible, comprehensive management approach that links IT resources and business objectives. BSM makes sure that everything IT does is prioritized according to business impact, and enables IT organizations to proactively address business requirements.

CAB
See change advisory board (CAB)

CCM
See Change and Configuration Management.

certificate group
Consolidates the tracking of license certificates. A master certificate is grouped with individual child license certificates. The CIs are attached to the master certificates. License allocation numbers are attached to the child license certificates.

change advisory board (CAB)
A group that advises change management on the implementation of significant changes to the IT infrastructure. This group is often made up of representatives from various IT areas and business units.

Change and Configuration Management
A BMC Remedy Change Management integration with BMC Configuration Management for Clients that proactively manages both IT and business-driven changes, protects the IT environment, and verifies that the change was successfully performed. It does this by using planning and decision-making data contained in a dedicated BMC Atrium CMDB.

change authority
The name of a group with the authority to approve changes. This group can also be called the Change Advisory Board. See also change advisory board (CAB).
change management
As a concept, the process of planning, scheduling, implementing, and tracking changes to the IT infrastructure, or any other aspect of service, in a controlled manner. By using change management, you can implement approved changes with minimal disruption to the business environment.

change manager
A person responsible for filtering, accepting, and classifying all change requests. The change manager is also responsible for planning and coordinating the implementation of the changes. Sometimes known as a change supervisor.

change request
The controlled process for the addition, modification, or removal of approved, supported, or baselined hardware, networks, software, applications, environments, or systems. A change request can involve multiple change activities.

charge-back
The process of charging departments or cost centers for the IT infrastructure required to support its business processes.

charge-back invoice
A detailed list of charges to cost centers, including any charge-back percentage.

charge-back percentage
A percentage used to calculate charge-back costs.

charge-back report
A report used by a cost manager to track information and find entries that might need to be adjusted.

charge-back summary
The total charges made to cost centers, including charge-back percentage. For split cost centers, it also provides information about how charges are allocated for source cost centers and target cost centers.

CI
See configuration item (CI).

CI unavailability
The downtime of a CI.

CI unavailability record
The time when a CI is either partially or completely unavailable to perform its required function. CI unavailability records can be broadcast or related to other records.

class
Metadata in the BMC Atrium CMDB that defines a type of object, usually a configuration item (CI) or relationship.

client tier
The architecture level where AR System clients operate within the multitier system.

CMDB
See BMC Atrium Configuration Management Database (BMC Atrium CMDB).

Company field
A field in BMC Remedy ITSM that controls multi-tenancy. It shows only data for the companies for which you have permission. See also multi-tenancy.

configuration
Sets of CIs that are required by different groups of people in the company.

configuration administrator
Configuration administrators require an overall view of the CIs for which their support groups are responsible. Some organizations call this role an asset manager.

configuration catalog
A feature of Asset Management that stores your standard configurations (such as a standard desktop, laptop, server, and so on) for management purposes.

configuration item (CI)
An infrastructure component or an item associated with the infrastructure that is (or will be) under the control of configuration management, for example, a Request for Change. A CI can be complex or simple, large or small. CIs can include entire systems or be a single module or minor component. CIs can also include records of people (users and customers) and locations.
configuration management
The process of maintaining detailed IT inventory records. It involves identifying and defining the CIs in a system, recording and reporting the status of all CIs and requests for change, and verifying the completeness and correctness of all CIs. See also configuration item (CI).

Configuration Management Database
See BMC Atrium Configuration Management Database (BMC Atrium CMDB).

contract
A documented relationship between two parties that identifies details about each party, accounting and budget codes, purchase cost, and expiration dates. For service level management, a contract ties one or more SLAs, OLAs, or underpinning contracts to the interested parties. The contract also makes it possible to segment and restrict access to the compliance and service target results so that results can be viewed by contract. See also service level management (SLM).

contract manager
Contract managers are responsible for managing IT contracts. In some organizations, the contract manager also takes on the role of software asset manager. See also software asset manager.

cost center
An entity tracking cost information within an organization. See also split cost center.

cost management
All of the policies, procedures, and deliverables required to fulfil an organization’s costing and charging requirements.

currency code
The three-letter code that represents a currency type, such as USD for United States Dollars.

dashboard
Web-based, graphical user interface using flashboards where compliance and service target results can be viewed by service level managers, service delivery managers, other IT professionals, and customers or line of business owners. See also flashboard.

data consumer
An application that works with data in BMC Remedy ITSM. It might view the data or modify it. See also data provider.

data provider
An application that loads data into BMC Remedy ITSM. This is often a discovery application. See also data consumer.

dataset
A logical group of data in BMC Atrium CMDB. A dataset can represent data from a particular source, a snapshot from a particular date, and so on. The dataset used by BMC products for reconciled production data is named BMC Asset.

decision tree
A step-by-step guide set up by an administrator. It guides the user through a questionnaire and, based on the user’s answers, completes part of the form for a new incident.

depending balance depreciation
A method of calculating depreciation in which CIs depreciate at a constant rate per year, accelerated by a factor of 150 percent. In this method of accelerated depreciation, 150 percent of the straight-line depreciation amount is taken the first year, and then that same percentage is applied to the undepreciated amount in subsequent years. See also double-declining balance depreciation.

definitive media library (DML)
A central repository of approved product dictionary entries (PDEs). See also product dictionary entry (PDE).

dependent change request
A change request that must be completed in sequence, as defined by the change manager.
**depreciation**
The loss of an asset’s value resulting from the passage of time.

**double-declining balance depreciation**
A method of calculating depreciation in which CIs depreciate at a constant rate per year, accelerated by a factor of 200 percent. In this method of accelerated depreciation, double the straight-line depreciation amount is taken the first year, and then that same percentage is applied to the undepreciated amount in subsequent years. See also *declining balance depreciation*.

**down CI**
A CI out of service for repairs or not working.

**DML**
See *definitive media library (DML)*.

**escalation**
A workflow component that searches at specified times or at regular intervals for requests matching a specified condition, and performs specified operations on all matching requests. Escalations are generally used to find records that have exceeded needed business rules or processes, and take appropriate action. They run on the AR System server.

**evergreen contract**
A contract that never expires. See also *never ending*.

**federated data**
Data linked to a CI in the BMC Atrium CMDB, but stored externally. Federated data might represent more attributes of the CI or related information, such as change requests on the CI.

**flashboard**
A real-time visual monitoring tool that shows you the state of your service operations, warns you about potential problems, and collects and shows trend data.

**form**
A collection of fields in which information is entered and displayed. The collection of fields represents a record of information in the AR System. AR System administrators can define and change the fields and workflow associated with a form. An AR System application can include many forms.

**functional role**
A defined role used for notifications and to extend access granted by permission groups.

**global**
A setting that applies changes or defines certain parameters for all companies in a multi-tenancy environment. See also *multi-tenancy*.

**goal**
Measurement method that allows you to track the time taken to resolve an issue or track how often an asset or service was available. Goals are used to determine whether service targets are met.

**Group coordinator**
Group coordinators are responsible for the quality and integrity of the incident management processes and for the work of their support group members. They coordinate the assignment of incident requests to support staff. The group coordinator’s other responsibilities include: monitoring incidents; monitoring open incidents requiring assignment; managing the assignment of incidents to the appropriate support groups for resolution; receiving notifications of incident assignments and escalations; facilitating the resolution of escalated incidents in accordance with the escalation policy; ensuring the resolution of
Group coordinator (continued)
incidents within the support group's service targets; ensuring the overall completeness and accuracy of closed incidents; reviewing reports; ensuring that incidents requiring root cause analysis are copied into BMC Remedy Problem Management; managing support group membership; and managing scripts, templates, and decision trees. Note that group coordinators were formerly known as incident managers.

guest user
Users who have not been configured with login information in the People form. Guest users cannot create change requests.

impacted area
Companies, locations, or organizations affected by changes or updates to CIs.

incident
Any event that is not part of the standard operation of a service and that causes an interruption to or reduction in the quality of that service. See also incident management and problem investigation.

incident management
As a concept, a reactive process typically initiated in response to a customer’s call. The primary goal of the incident management process is to restore normal service operation as quickly as possible and with minimum disruption to the business.

Incident manager
See Group coordinator.

incident matching
A search process in Incident Management that can be used to search for other incidents, problem investigations, known errors, and solution database entries that share some of the same characteristics as the current incident, such as product categorization.

incident owner
The user who records the incident. This user might differ from the current incident assignee. See also assignee.

Information Technology Infrastructure Library (ITIL)
A set of guidelines for the management and provision of operational IT services.

instance
A record in BMC Remedy ITSM. An instance is an object of a particular class. Both CIs and relationships are considered instances.

inventory
The quantity of CIs available.

ISO currency code
See currency code.

ITIL
See Information Technology Infrastructure Library (ITIL).

key performance indicator (KPI)
A data point used to measure whether a performance-monitoring service target meets its goals. See also service level agreement (SLA).

known error
A problem that has been successfully diagnosed and for which a temporary work-around or permanent solution to the known error has been identified. See also problem and work-around.

KPI
See key performance indicator (KPI).

License Engine
The License Engine performs the processing for the software license management feature to connect software CIs with license certificates and to calculate compliance. The License Engine runs as a plugin.

license job
A job that runs on the License Engine. The license job specifies the scope of CIs and license certificates that are processed by the license engine.
license type
Provides a set of connection rules, which the License Engine uses to query BMC Atrium Configuration Management Database (BMC Atrium CMDB) and select the appropriate CIs to connect to a software license type. Each license type also provides a set of compliance rules, which the License Engine uses to calculate whether the license is in compliance. See also software license certificate.

life cycle asset management
Managing the life of a CI through its purchase, deployment, and disposal.

maintenance schedule
A schedule used to perform maintenance on CIs.

master contract
The overarching contract with a company for which you have additional related contracts. The related contracts can include software licenses, support contracts, and any other type of contract.

multi-tenancy
A feature in BMC Remedy ITSM that uses the Company field to limit access by individuals. The Company field can be used to represent a company, business unit, or other group. The Company field also can be used to control access in a hosted environment. By default, BMC Remedy ITSM applications operate in multi-tenancy mode. See also single-tenancy.

navigation pane
An area on the left side of consoles that provides links to functionality and links to other programs.

never ending
Term for a contract that never expires. Also known as an evergreen contract.

New Request Wizard
A simple form for requesters to submit service requests. Requesters use the New Request Wizard interface to submit service requests to IT, which is the only way to submit a service request from the Requester console.

non-bulk CIs
Stand-alone configuration items, for example, a single server or laptop.

notification
A message sent to a user by workflow. Notification can be in the form of an alert, email message, or other method using integrations.

OLA
See operational level agreement (OLA).

On-Duty manager
On-Duty managers take over the responsibility from service owners when the owner is not available to perform the incident escalation handling procedure. In these situations, the on-duty manager decides whether an escalated incident must be resolved by implementing an emergency change, by recovering the affected service at its continuity site, or by continuing the resolution of the incident within the incident management process. See also Service owner.

operational catalog
A feature in which operational categories for service requests are defined.

operational categorization
A three-tier hierarchical representation of operations as defined in the Operational Catalog configuration form. This categorization is included in records to specify the range of operations to which a record applies.

operational level agreement (OLA)
An internal agreement used to define and track the level of service provided for an IT organization. An example is an agreement between the network management team and the service desk.
operator
When creating a search, it is one of a number of functions that enable you to define advanced searches or build qualifications.

In the Service Management Process Model, it describes a specific Service Desk role. An operator reviews all new events; correlates each new event with other events and with information regarding planned changes and events; registers an incident request for each event that represents an unplanned service degradation or outage, or that represents the first warning of a future service degradation or outage, and ensures that the incident request information is complete and meaningful; resolves as many of the registered incident requests as possible within the limitations of the granted access rights and time constraints; ensures that the registered incident requests, but which cannot be resolved by the operators, are assigned to the most appropriate group for resolution.

outage
See CI unavailability.

Overview console
A central console for BMC Remedy ITSM applications. The console works like a control panel from which users can access all assigned work and perform their primary activities.

parent/child contract
A parent, or main, contract that has other children, or subcontracts, associated with it.

PDE
See product dictionary entry (PDE).

peer change request
A dependent change request that can be completed at the same time as another change request.

peer-to-peer
Devices that are on the same level in an organization’s network (for example, two workstations). See also notification.

permission group
A feature of the BMC Remedy ITSM applications that controls what areas of the application a user can access. Each permission group can access only certain areas of the application. A user can belong to more than one permission group.

problem
The root cause of an incident or potential incident. After a resolution or work-around is identified, the problem becomes a solution database entry or known error. See also incident, known error, solution database, and work-around.

Problem coordinator
Problem coordinators are responsible for the quality and integrity of the problem management process. Problem coordinators have full access to problem investigations, known errors, and solution entries assigned to their support groups. Their responsibilities include: reviewing the incident requests that have been related to the services for which they act as the problem coordinator, to help identify problems; ensuring that the problems for which they are responsible, including the ones that have been identified within the Availability and Capacity Management processes, progress through the problem management process in a timely and prioritized fashion; ensuring that the information entered in the problem investigations and known errors that they manage is accurate and complete; periodically reviewing their problem investigations for which a practical structural solution cannot be found; verifying structural solutions and closing the known errors and problem investigations that they manage. Note that problem coordinators were formerly known as problem managers.

problem investigation
A process that helps an IT organization diagnose the root cause of incidents and potential incidents. It initiates actions that help to improve or correct the situation, preventing the incident from recurring.
problem management
As a concept, a process that identifies the cause of problems and initiates actions that help to improve or correct the situation, preventing an incident from recurring or occurring in the first place. The cause identified by a problem investigation can be documented in a known error or solution database record. See also incident, known error, solution database, and problem.

problem manager
See Problem coordinator.

process flow
Shows the progress of a request as it moves through the stages of its life cycle. It does this within a form, such as an incident request. A diagram shows the stages of the process, as indicated by best practices, rooted in ITIL processes. It indicates the current stage and state of the request. The process flow diagram also serves as a wizard, guiding the user through the life cycle.

product categorization
A five-tier hierarchical representation of products as defined in the Product Catalog configuration form. This categorization is included in records to specify the range of products to which the record applies.

product dictionary entry (PDE)
An entry in the Definitive Media Library that represents the master name of a software application. See also definitive media library (DML).

reconciliation
A feature in BMC Atrium CMDB that, in addition to other tasks, checks for duplicate CI records using the Reconciliation Engine. A CI record marked by the reconciliation process may be deleted by the application administrator. See also Reconciliation Engine

Reconciliation Engine
A component of the BMC Atrium CMDB. The Reconciliation Engine merges data from different discovery services based on identification and precedence rules.

registered user
A user who has an entry in the People form with an AR System login ID.

relationship
A type of BMC Atrium CMDB class that defines the relationship between two CIs.

release management
As a concept, a process that is responsible for planning, scheduling, and controlling the movement of releases to test and live environments. Release management makes sure that the integrity of the live environment is protected and that the correct components are released.

reminder
A message similar to an AR System notification, except that you can define the content of a reminder and specify when to send it.

request-based service target
A service target that measures how long a process takes, such as the time to respond to or resolve a service desk request, or the time to respond to or resolve a change request.

requester
A person in the organization who needs assistance from the IT support staff. A requester is usually an employee in the organization who needs to have a change implemented or an incident resolved.

Requester console
The front end for the Change Management and Incident Management applications. It provides an easy, user-friendly interface that allows users to quickly submit requests for change or incidents to the two back-end applications, and to view their submitted requests.

residual value
The value you can purchase an item for after its lease expires.
**return on investment (ROI)**

A method of calculating when the capital cost of implementing a project, product, or service will be recovered through the savings that result from completing the activity. The ROI can be expressed in terms of internal savings, increased revenue from external sources, or some combination of these types of savings. See also *service level agreement (SLA)* and *service level management (SLM)*.

**ROI**

See *return on investment (ROI)*.

**role**

A set of responsibilities, activities, and authorizations, usually within the context of a single application or a business system.

**Note:** Access to BMC Remedy ITSM applications is based on user roles. Depending on your role in the organization—requester, support, management—you work with a different application (or view) on your desktop.

**rolling contract**

A contract that automatically renews upon expiration.

**root cause**

The underlying cause of an IT-related problem experienced by a customer.

**row level locking**

See *multi-tenancy*.

**salvage value**

The estimated value that a CI will realize at the end of its useful life. See also *useful life*.

**sandbox dataset**

Mechanism that controls how data is updated in BMC Atrium CMDB when the data comes from multiple sources.

BMC Remedy Asset Management is installed with the sandbox dataset set to BMC.ASSET.SANDBOX and the production dataset set to BMC ASSET. See also *dataset*.

**script**

Detailed instructions that have been set up by an administrator to prompt users with questions that can assist in resolving or assigning an incident.

**service catalog**

A list of IT services, default levels, and options.

**Service Desk Analyst**

Service Desk Analysts are usually first-line support staff. A service desk analyst's responsibilities include: providing an interface between the service owner organization and its customers; obtaining accurate and complete information from the user when creating the incident request, and doing so efficiently and accurately; resolving as many of their registered incident requests as possible within the limitations of their access rights and their time constraints; ensuring that the incident requests that they have registered, but which they are unable to resolve, are assigned to the most appropriate group for resolution; and validating incident request resolutions with their users. See also *Service owner*.

**service level agreement (SLA)**

An agreement between a service provider and its customers or lines of business that formally documents the needs of the customer and makes sure the correct level of service is received from the service provider.

**service level management (SLM)**

As a concept, the continuous and proactive process of defining, agreeing, monitoring, reporting, and reviewing the performance of IT services to make sure that adequate levels of service are delivered in alignment with business needs and at acceptable cost.

**service manager**

A manager who uses Asset Management to create service objects used for interpreting business problems, for example, cost of unavailability of services to a business area.
Service owner
Service owners create and assign incident requests. They also decide whether an escalated incident needs to be resolved by implementing an emergency change, by recovering the affected service at its continuity site, or by continuing the resolution of the incident within the incident management process.

service request
A request for service to the IT organization. Service requests can be requests for change or requests to resolve incidents that impact the user.

Service Request console
See Requester console.

service target
The individual level of service to achieve. A service target includes terms and conditions, goals, costs, and milestones. Examples of service target goals include incident resolution time of 30 minutes, application response time of 4 seconds, and an application being in a state of “OK.” See also availability service target and request-based service target.

single-tenancy
A feature that allows selection of a default company for company fields in BMC Remedy ITSM. Single-tenancy mode is required to give unknown users access to the BMC Remedy ITSM Requester console. See also multi-tenancy.

SLI
See software library item (SLI).

SLM
See service level management (SLM).

software asset management
Software asset management is a core component of an overall asset management policy. ITIL in the Software Asset Management Book defines software asset management as “all of the infrastructure and processes necessary for the effective management, control and protection of the software assets within an organization, throughout all stages of their lifecycle.”

Software Asset Management console
Designed for software asset managers, this console provides views of software license compliance. From this console, the software asset manager can manage software license certificates and can manage jobs that automatically attach CIs to software license certificates.

software asset manager
Software asset managers are responsible for optimizing software assets and for managing compliance with software license contracts. They also evaluate usage of software licenses to make sure that the organization is not over-purchasing licenses.

software library item (SLI)
The physical storage locations of the master copy of a software application and its versions.

software license certificate
Indicates the right to deploy software in your environment.

software license compliance
Keeping track of what software your company has and that it has the legal right to use it.

software lifecycle
The software lifecycle comprises stages for negotiation, procurement, deployment, maintenance, renewal, and end of life.

solution database
A repository that stores reusable solutions to customer product problems in an easy-to-retrieve format.

solution entry
A reusable solution to a customer product problem. This is stored in the solution database.
Specialist
Specialists are usually second-line and third-line support staff. They are considered subject matter experts. Their main responsibility is to provide an accurate analysis and a diagnosis of their assigned incident requests to restore service to the affected users. A specialist’s other responsibilities include: resolving incident requests; updating incident requests with relevant information and status changes; escalating incident requests, for which resolutions can be implemented only through the change management process.

split cost center
A cost center that enables a department to split its costs with other departments. For example, a project management group might split its costs with an engineering department and a sales department. The project management department would be a split cost center, and the engineering department and sales department would be target cost centers.

straight-line depreciation
A method of calculating depreciation in which CIs depreciate at a constant value per year. The annual depreciation is calculated by subtracting the salvage value of the CI from the purchase price and then dividing this number by the estimated useful life of the CI.

submitter
A person who reports a problem, makes a request, or enters information into a database. See also change request.

submitter group
One of several special access control groups that the AR System provides. Users automatically belong to this implicit group for requests they have submitted. See also assignee.

sum-of-the-year’s digits depreciation
A method of calculating depreciation in which CIs lose more of their value early in their lifetime. This method of calculating depreciation of a CI assumes higher depreciation charges and greater tax benefits in the early years of a CI’s life.

task
A unit of work that needs to be completed as a step in implementing a change request, an incident request, or a problem investigation. In the BMC Remedy Incident Management and BMC Remedy Change Management applications, you can also group a number of activities for requests with a number of actions that need to be completed before the request can be resolved. Your administrator creates task templates and task group templates that you can reuse for the same types of requests. Tasks can be manual or automatic.

task management system (TMS)
A module that is used to create task templates and task group templates. Besides the ability to set up predecessor-successor relationships, TMS supports branching and multiple task paths as well as the data exchange between activities.

TCO
See total cost of ownership (TCO).

template
1. A set of predefined criteria or settings that can be used by many agreements or service targets. See also service level agreement (SLA).
2. A form set up by an administrator that a user can select to complete an incident ticket or a change request with information consistent with the user’s support group and the type of incident or change request.

terms and conditions
The terms and conditions of a contract. For service level management, the conditions that specify whether a service target should take effect. For example, the terms and conditions could specify that the service target applies only to incidents in which the priority is urgent and the service is email. Or the service target applies only to a specific set of KPIs. See also service target.
**time-based service target**
A service target that measures the time taken, for example, to resolve an incident from the time the incident was reported to the time it was resolved. Any time that falls within the "Exclude when" qualification is ignored and not measured.

**TMS**
See *task management system (TMS).*

**topology**
The pattern of links connecting pairs of nodes of a network.

**total cost of ownership (TCO)**
A method of calculating all expenses associated with a CI over its lifetime. The calculation considers depreciation, maintenance, staff costs, accommodation, and planned renewal.

**useful life**
The number of years that a depreciable CI is expected to be in use.

**wildcard**
A character that users can type to represent other characters in a search. For example, in search statements in character fields, users can specify wildcards to match single characters, strings, or characters within a range or set.

**work info**
A record describing work performed.

**work-around**
A temporary resolution to an incident, problem, or known error.

**workflow**
The automated set of business processes used to run a company.

In AR System, workflow automates your company’s processes through the use of active links, filters, and escalations.” (I see that “escalation” is a glossary entry and it uses the term “workflow” within its definition – the AR system workflow.)
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