Cisco TEO—Process Automation Guide for BMC Remedy

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Americas Headquarters
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
http://www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 527-0883

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Cisco TEO—Process Automation Guide for BMC Remedy

CONTENTS

New and Changed Information

New and changed information for the most recent releases of the Cisco TEO Process Automation Guide for BMC Remedy is as follows:

- Latest Release

Latest Release

Table 1 April 2012—Cisco TEO Process Automation Guide for BMC Remedy 2.3 Changes

Feature	Location
Revised Text Part Number (-01 to -02).	Front cover, footers
Updated Trademark and Copyright date	Inside cover page

Preface

Cisco TEO automation pack (tap) files are a collection of Tidal Enterprise Orchestrator (TEO) processes (workflows) authored by subject matter experts that work out-of-the-box to automate best practices for a particular technology. The tap files also include configuration objects that are used in the processes, such as global variables, categories, target groups, extended target properties, task rules and knowledge base articles.

The Cisco TEO Automation Pack for BMC Remedy contains the content to support synchronization of TEO incidents with the corresponding Remedy incidents. This guide provides information on importing the automation pack and using the content in TEO.

Organization

This guide includes the following sections:

Chapter 1	Importing the Automation Pack	Provides instructions for installing the automation pack during or after the initial installation of TEO.
Chapter 2	Understanding the Automation Pack Content	Provides information on the objects included in the automation pack.
Chapter 3	Getting Started Using the Automation Pack	Provides information on creating the objects for using the content in the automation pack (runtime users, targets, and task rules).
Chapter 4	Managing BMC Remedy Processes	Provides information on using and managing the BMC Remedy processes.

Conventions

This guide uses the following conventions:

Convention	Indication
bold font	Commands and keywords and user-entered text appear in **bold** font.
italic font	Document titles, new or emphasized terms, and arguments for which you supply values are in *italic* font.
[ ]	Elements in square brackets are optional.
{x | y | z }	Required alternative keywords are grouped in braces and separated by vertical bars.
[x | y | z]	Optional alternative keywords are grouped in brackets and separated by vertical bars.
string	A nonquoted set of characters. Do not use quotation marks around the string or the string will include the quotation marks.
`courier` font	Terminal sessions and information the system displays appear in `courier` font.
< >	Nonprinting characters such as passwords are in angle brackets.
[ ]	Default responses to system prompts are in square brackets.
!, #	An exclamation point (!) or a pound sign (#) at the beginning of a line of code indicates a comment line.

Note Means *reader take note*.

Tip Means *the following information will help you solve a problem*.

Caution Means *reader be careful*. In this situation, you might perform an action that could result in equipment damage or loss of data.

Timesaver Means *the described action saves time*. You can save time by performing the action described in the paragraph.

Warning **Means *reader be warned*. In this situation, you might perform an action that could result in bodily injury.**

Product Documentation

Documentation Formats

Documentation is provided in the following electronic formats:

- Adobe® Acrobat® PDF files
- Online help

You must have Adobe® Reader® installed to read the PDF files. Adobe Reader installation programs for common operating systems are available for free download from the Adobe Web site at www.adobe.com.

Guides and Release Notes

You can download the TEO product documentation from Cisco.com. Release Notes can be found on Cisco.com and the product CD.

Online Help

Online help is available and can be accessed using the following methods:

- Click the **Help** button on any dialog in the application to open the help topic in a pane to the right of the dialog.
- In the Tidal Enterprise Orchestrator console:
  - Click the **Help Pane** tool on the toolbar to open the help topic in a pane to the right of the console results pane.
  - Click **Help** on the menu bar.

Open Source License Acknowledgements

Licenses and notices for open source software used in Cisco Tidal Enterprise Orchestrator can be found in the Open Source License Acknowledgements found on Cisco.com. If you have any questions about the open source contained in this product, please email external-opensource-requests@cisco.com.

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html

Subscribe to the *What's New in Cisco Product Documentation* as a RSS feed and set content to be delivered directly to your desktop using a reader application. The RSS feeds are a free service and Cisco currently supports RSS Version 2.0.

CHAPTER 1

Importing the Automation Pack

The *Cisco TEO Installation and Administration Guide* provides instructions for installing Tidal Enterprise Orchestrator (TEO) and the core components. During the initial installation of TEO, you can choose to import the automation packs, or import them later from within the Console.

Because the BMC Remedy automation pack has a dependency on the Common Activities automation pack, it must be imported prior to importing the BMC Remedy automation pack. This chapter guides you through importing the automation packs. It contains the following sections:

Note It is recommended that you review the system requirements and prerequisites before importing automation packs. *See* the *Cisco TEO Installation and Administration Guide*.

Accessing the Automation Pack Import Wizard

You use the Automation Pack Import Wizard to import the automation packs (tap files). You can either open the wizard immediately after installing TEO or from within the Console.

Opening the Import Wizard After Running Setup Wizard

Step 1 After running the Setup wizard to install the product, ensure that the **Launch automation pack import wizard now** check box is checked before closing the wizard.

The Select Automation Packs dialog box displays the available automation packs. All automation packs are checked by default.

Step 2 Ensure that the following check boxes are checked and then click **OK** to launch the Automation Pack Import Wizard:

- Core (*checked and locked by default*)
- Common Activities (*dependency*)
- BMC Remedy

Note *See* the *Cisco TEO Installation and Administration Guide* for instructions on importing and configuring the Core automation pack.

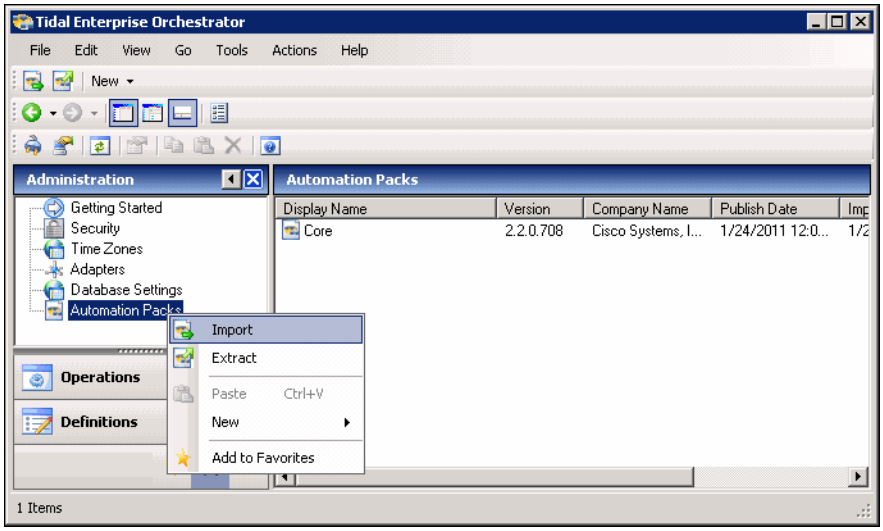
Proceed to Importing the BMC Remedy.tap, page 1-6.

Opening the Import Wizard from Console

You can open the Automation Pack Import Wizard from within the Console after installing the product.

Step 1 In the Administration workspace on the Console, click **Automation Packs** in the navigation pane.

Figure 1-1 Automation Packs View—Import Menu



Step 2 Use one of the following methods to open the Automation Pack Import Wizard:

- In the navigation pane, right-click **Automation Packs** and choose **Import**.
- On the Menu bar, choose **Actions > Import**.

Step 3 On the Windows Open dialog box, select the **Common Activities.tap** file and click **Open** to launch the Automation Pack Import Wizard.

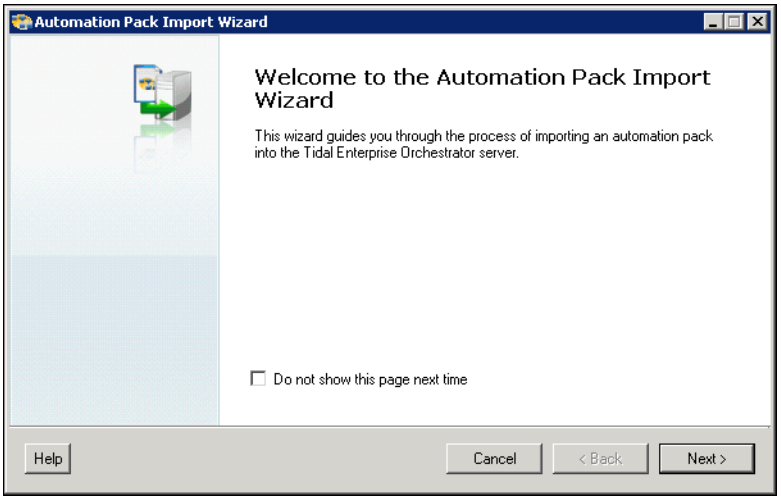
Proceed to Importing the BMC Remedy.tap, page 1-6.

Importing the Common Activities.tap

You must first import the Common Activities automation pack (Common Activities.tap). If you opened the Automation Pack Import Wizard from the Setup Completed panel, the wizard will guide you through importing each automation pack.

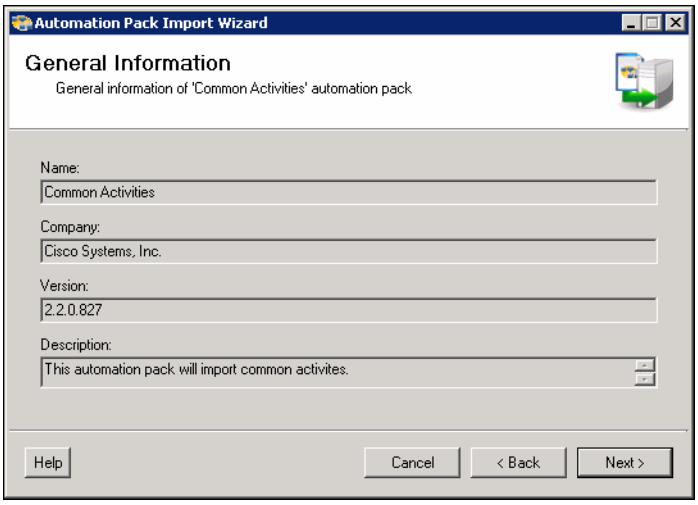
Step 1 On the Automation Pack Import Wizard Welcome panel, click **Next**.

Figure 1-2 Welcome to the Automation Pack Import Wizard



Note If you do not want to display the Welcome panel the next time the wizard is opened, check the **Do not show this page next time** check box.

Figure 1-3 General Information—Common Activities



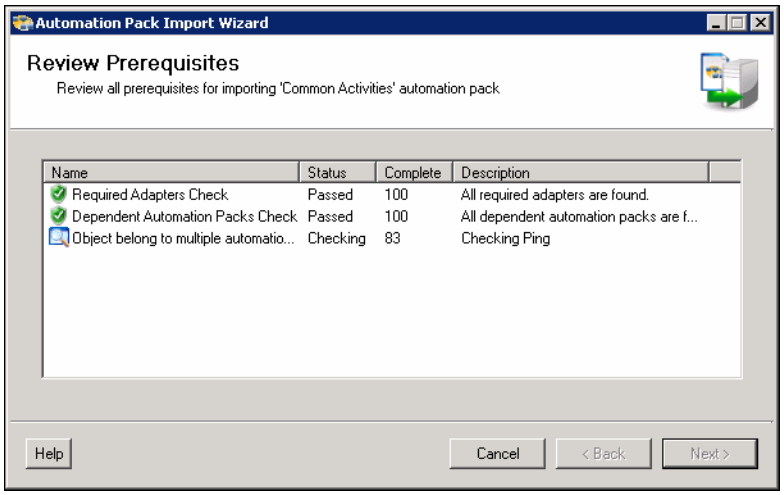
Step 2 On the General Information panel, review the information about the automation pack.

Step 3 If you want to disable all the processes that are imported with the automation pack, check the **Disable all imported processes** check box.

Note If you disable all the imported processes, you will need to manually enable the processes in the Console before they can execute.

Step 4 Click **Next** to continue.

Figure 1-4 Review Prerequisites—Common Activities



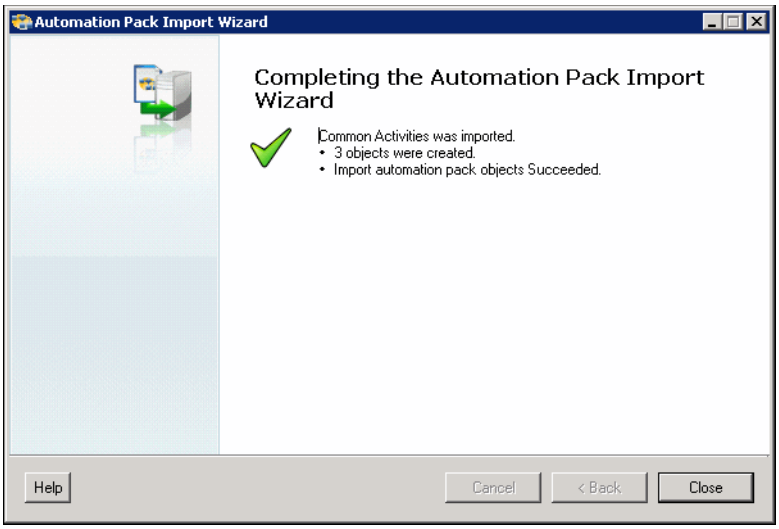
The Review Prerequisites panel displays the prerequisites for the automation pack being imported. The green check mark indicates that the prerequisite was found on the computer.

The red X indicates that the prerequisite was not found on the computer. When this occurs, the import process is stopped and cannot continue until all prerequisites have been met.

If all prerequisites are passed, the wizard automatically continues to the next panel.

Note If you opened the Automation Pack Import Wizard from the Setup Completed panel, the wizard displays the General Information panel (Figure 1-7 on page 1-7) for the next automation pack.

Figure 1-5 Completing the Automation Pack Import Wizard—Common Activities



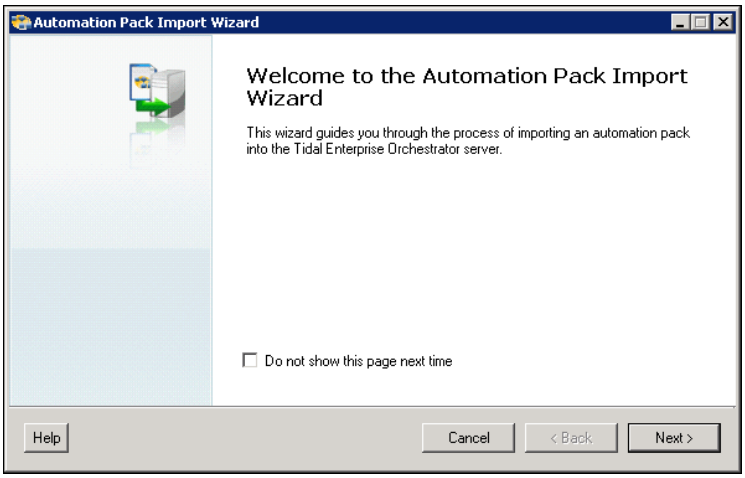
Step 5 After the objects have been imported, review the information on the Completing the Automation Pack Import Wizard panel to verify that it is correct and then click **Close** to close the wizard.

Importing the BMC Remedy.tap

The Automation Pack Import Wizard guides you through importing the BMC Remedy automation pack.

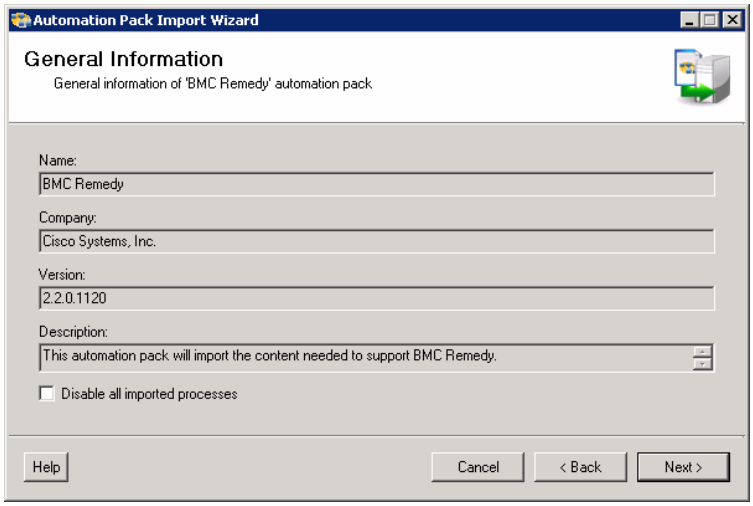
Step 1 On the Welcome panel, click **Next**.

Figure 1-6 Welcome to the Automation Pack Import Wizard



Note If you do not want to display the Welcome panel the next time the wizard is opened, check the **Do not show this page next time** check box.

Figure 1-7 General Information



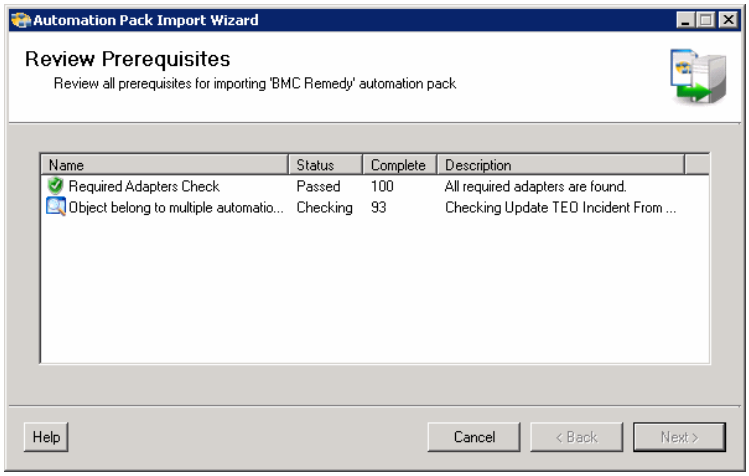
Step 2 On the General Information panel, review the information about the automation pack.

Step 3 If you want to disable all the processes that are imported with the automation pack, check the **Disable all imported processes** check box.

Note If you disable all the imported processes, you will need to manually enable the processes in the Console before they can execute. *See* Enabling a Process, page 4-2.

Step 4 Click **Next** to continue.

Figure 1-8 Review Prerequisites

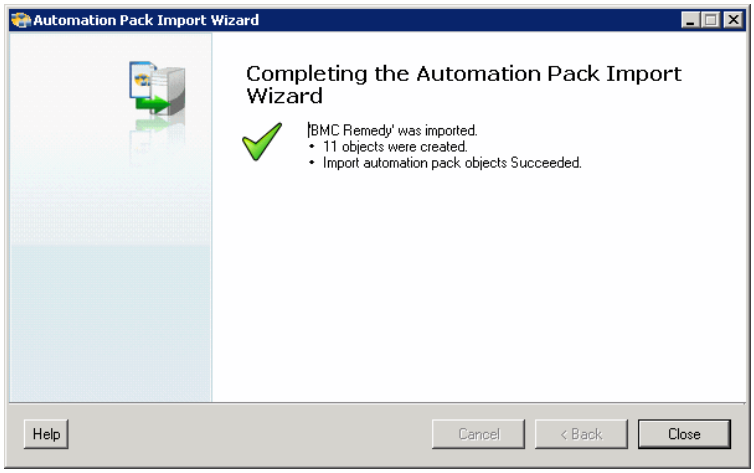


The Review Prerequisites panel displays the prerequisites for the automation pack being imported. The green check mark indicates that the prerequisite was found on the computer.

The red X indicates that the prerequisite was not found on the computer. When this occurs, the import process is stopped and cannot continue until all prerequisites have been met.

If all prerequisites are passed, the wizard automatically continues to the next panel.

Figure 1-9 Completing the Automation Pack Import Wizard



Step 5 After the objects have been imported, review the information on the Completing the Automation Pack Import Wizard panel to verify that it is correct and then click **Close** to close the wizard.

CHAPTER 2

Understanding the Automation Pack Content

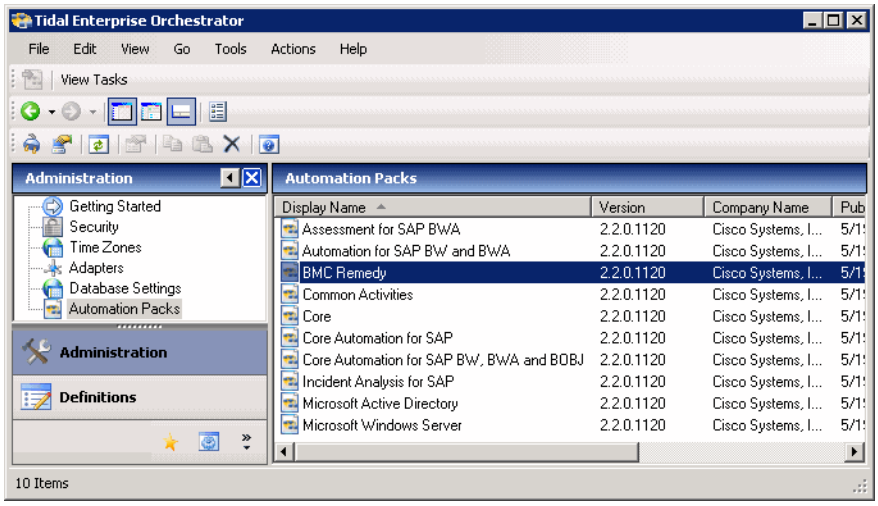
The Cisco TEO Automation Pack for BMC Remedy includes the content used to synchronize TEO incidents with Remedy incidents. This chapter provides information on the content included in the automation pack. It contains the following sections:

Accessing Automation Pack Properties

Users can access the automation pack properties from the Administration—Automation Packs view in the console. The automation pack properties dialog box displays general information about the content provided by the automation pack, version number, publish date, the provided objects, the dependencies of the automation pack, and the history of changes made to the automation pack.

Step 1 On the Administration workspace, click **Automation Packs** in the navigation pane to display the installed automation packs in the Automation Packs pane.

Figure 2-1 Accessing the Automation Packs



Information about the automation packs display in the following columns:

Column	Description
Company Name	Name of the company that released the automation pack.
Publish Date	Date the automation pack was created or exported to a file.
Version	Version number of the automation pack.
Display Name	Name of the automation pack.
ID	Identification number of the automation pack.
Import Date	Date the automation pack was imported into the product.
Licensed	Indicates whether the automation is a licensed product in TEO.
Description	Text description of the automation pack.

Step 2 Select the automation pack in the Automation Packs pane, right-click and choose **Properties**.

Step 3 On the Properties dialog box, select the appropriate tab to view the automation pack properties:

Tab	Description
General	Displays general information about the automation pack.
Objects	Display a list of objects contained in the automation pack.
Dependencies	Display a list of automation packs and adapters referenced by the objects in the automation pack.
History	Displays when the automation pack was created or modified, and audit log entries that are relevant to the automation pack.

Step 4 Click **Close** to close the dialog box.

Viewing Automation Pack Content and Dependencies

Use the automation pack Properties dialog box to view the content (objects) included in the automation pack and the dependencies associated with the automation pack.

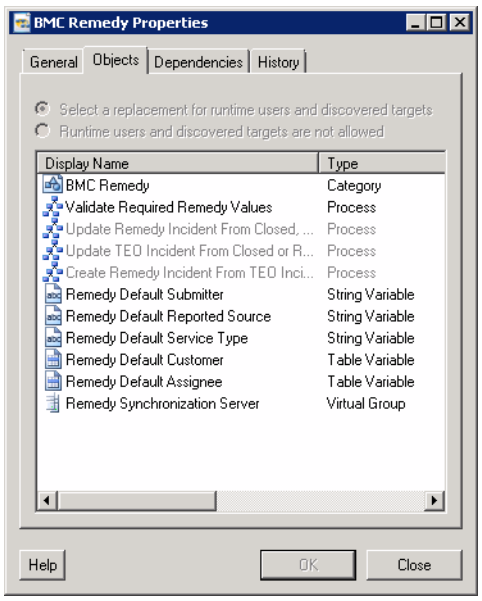
Viewing Automation Pack Content

Use the Objects tab to view a list of the content provided by the automation pack.

Step 1 On the Administration—Automation Packs view, select **BMC Remedy**, right-click and choose **Properties**.

Step 2 On the BMC Remedy Properties dialog box, click the **Objects** tab.

Figure 2-2 BMC Remedy Properties—Objects Tab



Step 3 On the Objects tab, review the information about the objects provided by the BMC Remedy automation pack.

Columns	Description
Display Name	Name of the object (processes, categories, target groups).
Type	Object type.
Action Required	Action required to successfully import or export the objects.
Description	Text description of the object.
Version	Object version.

Step 4 Click **Close** to close the dialog box.

BMC Remedy Processes

The BMC Remedy automation pack contains processes that synchronize TEO incidents with Remedy incidents. The following table contains the processes that are imported by the BMC Remedy automation pack.

Process Name	Description
Create Remedy Incident From TEO Incident	This process is an example of how to create a Remedy incident each time a TEO incident is created. It will map required Remedy values from the TEO incident such as assignee, impact, description and more. You must provide default values in the Remedy Default global variables and must configure the Remedy Synchronization Server global variable with the display name of the TEO Remedy target to use for synchronization.
Update Remedy Incident From Closed, Resolved or Cancelled TEO Incident	This process updates a Remedy incident linked to a TEO incident each time the TEO incident is closed, resolved or cancelled.
Update TEO Incident From Closed or Resolved Remedy Incident	This process updates a TEO incident linked to a Remedy incident each time a Remedy incident is closed or resolved.
Validate Required Remedy Values	This process validates the global variables that are required for process execution.

BMC Remedy Global Variables

The BMC Remedy automation pack provides the following global variables:

Global Variable Name	Description
Remedy Default Assignee	Contains the default Remedy Assignee properties that will be used when synchronizing TEO incidents with Remedy incidents and when creating Remedy incidents.
Remedy Default Customer	Contains the default customer properties that will be used when synchronizing TEO incidents with Remedy incidents.
Remedy Default Reported Source	Contains the Remedy Reporting Source that will be used when synchronizing TEO incidents with Remedy incidents.
Remedy Default Service Type	Contains the service type that will be used when synchronizing TEO incidents with Remedy incidents.
Remedy Default Submitter	Contains the Remedy User ID of the submitter that will be used when synchronizing TEO incidents with Remedy incidents.

BMC Remedy Target Groups

The BMC Remedy automation pack provides the following target group:

Target Group Name	Description
Remedy Synchronization Server	This virtual group includes all configured Remedy synchronization servers.

BMC Remedy Categories

The BMC Remedy automation pack provides the following category:

Category Name	Description
BMC Remedy	This category is assigned to all BMC Remedy processes.

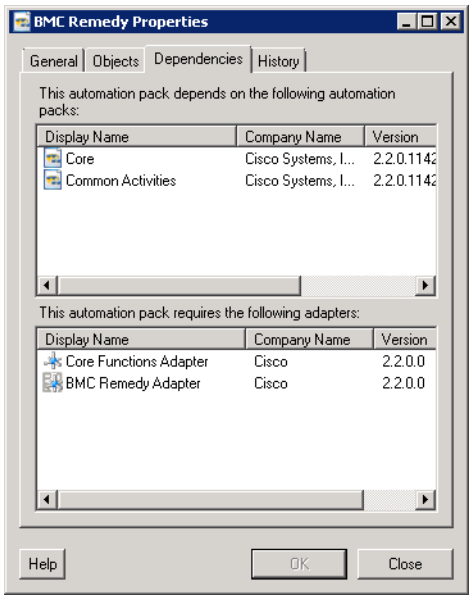
Viewing Automation Pack Dependencies

Use the Dependencies tab to view the automation packs and adapters referenced by the objects in the automation pack. These objects must be installed prior to importing the BMC Remedy automation pack.

Step 1 On the Administration—Automation Packs view, select **BMC Remedy**, right-click and choose **Properties**.

Step 2 Click the **Dependencies** tab.

Figure 2-3 BMC Remedy Properties—Dependencies Tab



Step 3 View the list of automation packs and adapters referenced by the BMC Remedy automation pack:

Object Type	Dependency
Automation Packs	• Core • Common Activities
Adapters	• Core Functions Adapter • BMC Remedy Adapter

Step 4 Click **Close** to close the dialog box.

CHAPTER 3

Getting Started Using the Automation Pack

Before you begin using the content that ships with the automation pack, you must create the objects in TEO that are referenced in the processes. These objects include targets, runtime users, task rules for assignments and notifications, and global variables.

This chapter provides basic information on defining the objects. It includes the following sections:

For additional information about the objects discussed in this chapter, refer to the following documentation:

Document	Description
Tidal Enterprise Orchestrator Reference Guide	General information about Core product features.
Cisco TEO Adapter Guide for BMC Remedy	Information about the objects specific to Remedy (runtime user, target, and activities).

Creating a Runtime User

The Runtime User is the account that will be used to connect to the Remedy Server target.

Note For additional information on creating and managing runtime users, *see* the *Tidal Enterprise Orchestrator Reference Guide*.

Step 1 In the Definitions workspace, right-click **Runtime Users** and choose **New > Runtime User** to open the New Runtime User Properties dialog box.

Step 2 On the General tab, specify the following information:

Note The **Required Value** icon displayed on a tab or page indicates that the field is required and is either missing a value or contains an invalid value.

Field	Description
Display name	Name for the user account. This field can populated with the information specified in the Domain and User name text fields, or you can enter a different name to display for the user account.
User name	Remedy user name assigned to the user account that connects to the Remedy Server target.
Password	Check the check box and enter the password assigned to the user account. **Note** No password verification is done for the simple (generic) runtime user.
Description	A description of the user account.

Note The Used By tab displays objects used by the runtime user and will remain blank until used by an object.

The History tab displays the history of actions taken against the runtime user and will remain blank until after the initial creation.

Step 3 Click **OK** to close the dialog box.

Creating a Remedy Server Target

Before you can create or run processes, you must create the targets which the processes will run against. You use the New Remedy Server Properties dialog box to create the Remedy Server targets.

This section guides you through creating the targets for the processes in the BMC Remedy automation pack.

Step 1 In the Definitions view, right-click **Targets** and choose **New > Remedy Server** from the submenus to open the New Remedy Server Properties dialog box.

Step 2 On the General tab, enter the following general information about the target:

Field	Description
Display name	Name of the target that displays in the Targets pane.
Type	*Display only*. Type of target.
Owner	User name of the owner of the target. This is typically the person who created the target. Click the **Browse** button to change the owner.
Status	*Display only*. Indicates the status of the target. The status determines whether the target is available or unavailable for process or activity execution.
Status Information	*Display only*. Detailed information regarding the target status and the reasons for the target being unreachable.
Organization	Name of the company that supports the target.
Description	Text description of the target.
Enabled	Check or uncheck the check box to enable or disable the target. The check box is checked by default which makes it available immediately upon creation. If you uncheck the check box, the target is disabled and will be unavailable for execution.

Step 3 Click the **Connection** tab to specify the connection information for the Remedy Server target.

Note The **Required Value** icon displayed on a tab or page indicates that the field is required and is either missing a value or contains an invalid value.

Field	Description
Remedy Server Name	Host name or IP address of the Remedy server.
Authentication	Optional string used by the client for authentication, such as domain name.
Port	Port number used to access the Remedy server.
Use credentials of the following runtime user	Runtime user account to be used to connect to the target. Select the default runtime user from the drop-down list. To view the properties for the runtime user, click the **Properties** tool. To create a new runtime user, click **New > Runtime User**.

Step 4 Click the **Polling** tab to configure the frequency that TEO queries a Remedy server to determine whether a trigger should be executed:

Field	Description
Polling interval (minutes)	Enter the number of minutes to wait before querying the Remedy server. Minimum default value for the polling interval is 1 minute and the maximum value is 10,000 minutes.

Step 5 Click **OK** to complete the procedure and close the dialog box.

Note For additional information on creating and managing Remedy Server targets, *see* the *Cisco TEO Adapter Guide for BMC Remedy.*

Adding Remedy Server Target to Virtual Target Group

After you have created the Remedy Server targets, you must add the target to the Remedy Synchronization Server virtual target group. This section guides you through adding the targets to the virtual target group.

Note You can add only one Remedy server target to this virtual group.

Step 1 In the Definitions view, click **Target Groups** in the navigation pane to display all the target groups in the details pane.

Step 2 Filter the target groups by the BMC Remedy automation pack.

Step 3 Right-click **Remedy Synchronization Server** and choose **Properties**.

Step 4 On the Remedy Synchronization Server Properties dialog box, click the **Members** tab.

Step 5 Click **Add** to open the Select Target Group Members dialog box.

Step 6 Select the target and click **OK** to close the dialog box.

Step 7 On the Remedy Synchronization Server Properties dialog box, click **OK** to close the dialog box.

Using Task Rules for Assignments and Notifications

Task rules are used to manage task assignments and notifications for tasks, such as incidents and alerts, that are generated from processes. The BMC Remedy automation pack does not include task rules but you can create your own task rules for assignments and notifications.

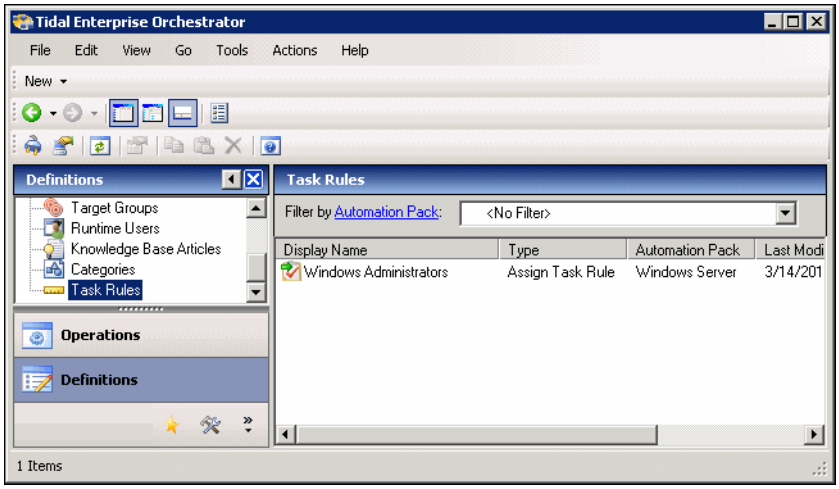
Note If you do not want to create task rules for email notifications, you can use the default notification based on assignment processes that ship with the Core automation pack. These processes are disabled by default and must be enabled if you want notifications to be sent (see Enabling Notification Based on Assignment Processes, page 3-17).

Accessing Task Rules View

Use the Task Rules view in the Definitions workspace to create and manage the task rules.

Step 1 On the Console, select the Definitions workspace and click **Task Rules** in the navigation pane. By default, all the rules display in the Task Rules pane.

Figure 3-1 Definitions—Task Rules View



The following information about the task rules displays by default:

Column	Description
Display Name	The name assigned to the task rule.
Enabled	Indicates whether the task rule is enabled (*True*) or disabled (*False*). A disabled task rule is unavailable for execution.
Type	Type of task.
Owner	User name of the person or group who assigned the task rule.
Last Modified Time	The date and time the task rule was last modified.

Column	Description
Last Modified By	The object or user name that last modified the task rule.
Id	Unique ID of the task rule.
Description	Brief description of the task rule.
Type Description	Brief overview of the task rule type.
Created Time	Time at which the task rule was created.
Created Date	Date the task rule was created.
Automation Pack	Name of the automation pack associated with the task rule.

Creating a New Task Rule

Use the Task Rules view to create a new task rule. The procedure is the same for all types of task rules with the exception of the task-specific tab (Assign, Notify, Update) for the type of task rule you are creating.

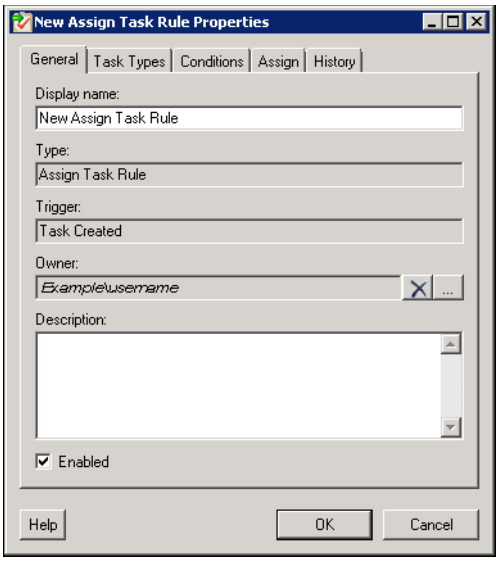
Note Only users with administrative rights can create task rules in TEO.

You can create the following types of task rules:

Task Rules	Description
Assign Task Rule	Assigns users to a task.
Notify Task Rule	Notifies users that a task has been created.
Update Task Rule	Specifies the properties to be updated in a task..

Step 1 In the Definitions workspace, right-click **Task Rules** and choose **New > [Task Rule Type]** to open the New Rule Properties dialog box. The task rule type will be one of the following:

Figure 3-2 New Rule Properties Dialog Box—General Tab

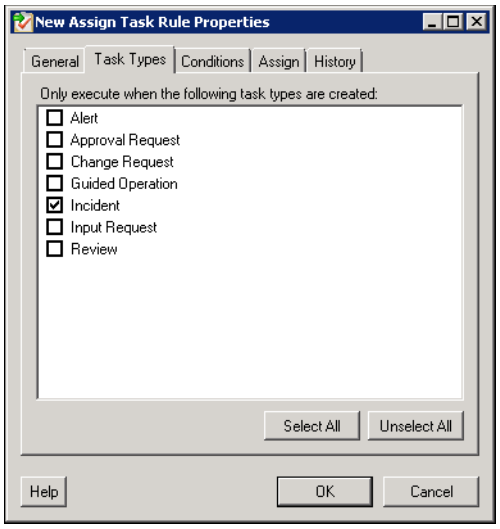


Step 2 On the General tab, enter the following information:

Field	Description
Display Name	Name of the task.
Type	*Display only.* Shows the type of object.
Trigger	*Display only.* Type of trigger associated with the task rule.
Owner	User name of the owner of the task rule. This is typically the person who created the task rule. Click the **Browse** ... tool to launch the Select User or Group dialog box to change the owner.
Description	A brief description of the task rule.
Enabled	The check box is checked by default to indicate that the task rule is available for execution. Uncheck the check box to disable the task rule. If the check box is unchecked, the task rule is disabled and will be unavailable for execution.

Step 3 Click the **Task Types** tab to specify the types of tasks to be executed by the rule.

Figure 3-3 New Rule Properties Dialog Box—Task Types Tab



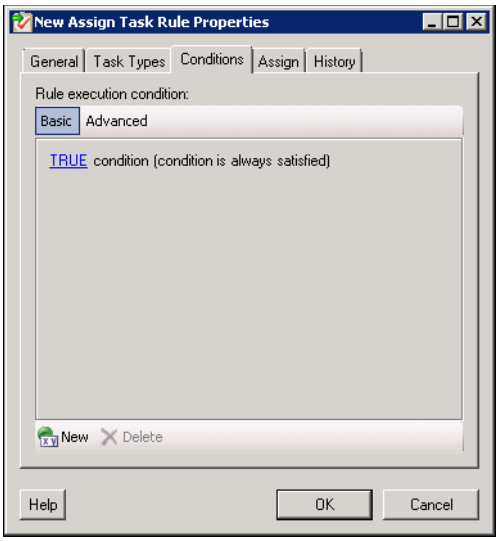
Step 4 Check the check box for the type of task that will execute the rule.

Task Type	Description
Alert	Alerts reflect potential problems that a user may want to investigate and possibly diagnose the problem.
Approval Request	Specifies the message and choices for the assignee who is approving the task.
Guided Operation	Details the steps a user takes to complete an assigned task.
Incident	Task requires an operator to take action in order to resolve an issue.
Input Request	Task requires input from an individual or group.
Review	Task assigns a document for review.

Step 5 Click the **Conditions** tab to specify the conditions of when the task rule action is to be taken based on an evaluation of the defined conditions.

Note The **Required Value** icon displayed on a tab or page indicates that the field is required and is either missing a value or contains an invalid value.

Figure 3-4 New Rule Properties Dialog Box—Conditions Tab

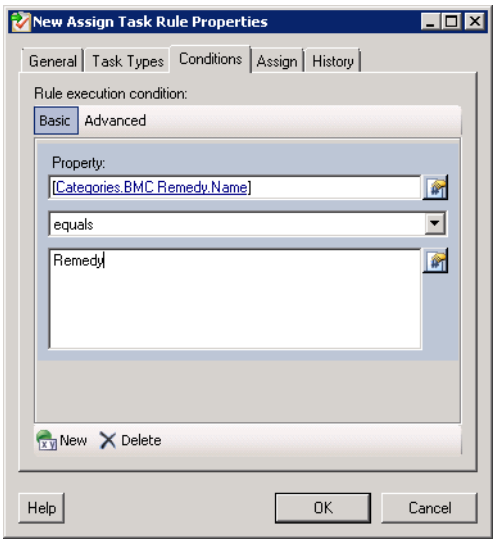


Step 6 On the Conditions tab, define the conditions that must be met for the rule to execute.

Defining a Basic Condition:

a. On the Basic page, click **New** to add a new property for the condition that must be met.

Figure 3-5 New Rule Properties Dialog Box—Basic Condition



b. In the Property text field, click the **Reference** tool to choose a defined variable or reference an object on the Insert Variable Reference dialog box.

c. Choose the condition expression from the drop-down list.

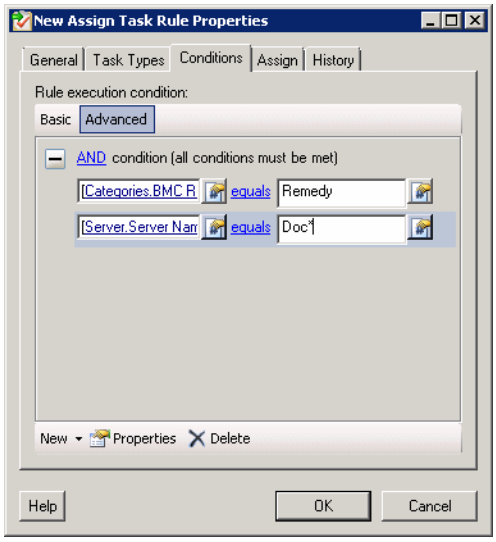
d. Enter the condition description in the text box or click the **Reference** tool to choose a defined variable or reference an object on the Insert Variable Reference dialog box.

e. Click **New** to define additional properties, if necessary.

Defining an Advanced Condition:

a. Click the **Advanced** tab to define a specific type of condition (Compound, Prior Process Instance, Time, or Variable).

Figure 3-6 New Rule Properties Dialog Box—Advanced Condition



b. Click the link to modify the option for the condition equation.

Option	Description
AND condition (all conditions must be met)	Click this option if an action is to be taken only when all conditions in the list are *true*.
OR condition (one condition must be met)	Click this option if an action is to be taken when one condition in the list is *true*.

c. Click **New** and choose the type of condition from the drop-down list.

d. Specify the relevant information for the type of condition selected.

Note Click the **Reference** tool to choose a defined variable or reference an object on the Insert Variable Reference dialog box.

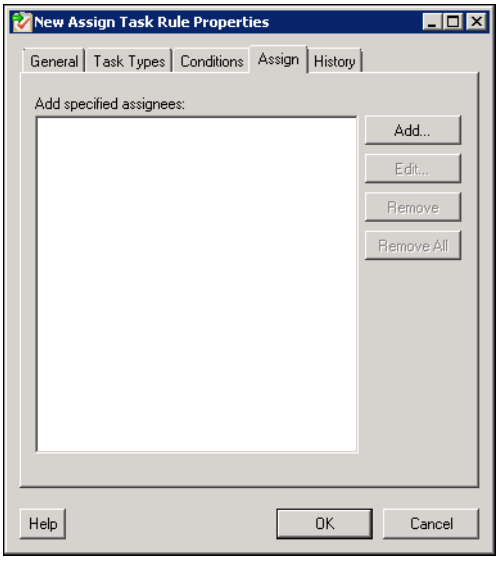
e. Click **New** to define additional properties, if necessary.

Step 7 Click the task rule specific tab (**Assign**, **Notify**, or **Update**) and specify the relevant information for the specific type of rule.

Assign Task Rule

If you are creating an Assign Task Rule, the Assign tab displays on the New Rule Properties dialog box.

Figure 3-7 New Rule Properties Dialog Box—Assign Tab



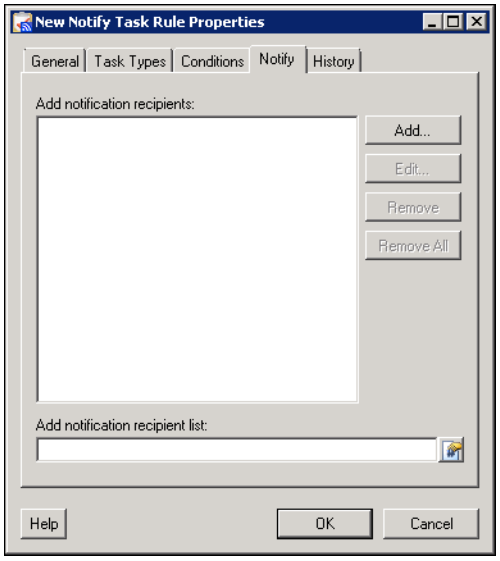
On the Assign tab, specify the assignees for task rule.

Field	Description
Add	Click this button to launch the Select Assignee to Add dialog box to specify the assignees. On the Select Assignee to Add dialog box, use one of the following methods to specify the assignee: • Click the **Reference** tool to select the appropriate variable reference containing the assignee or list of assignees from the Insert Variable Reference dialog box. • Click the **Browse** tool to launch the Select User or Group dialog box and add user to the list of assignees.
Edit	Select the appropriate assignee in the list and click this button to view or modify the assignee of the task rule.
Remove	Select the appropriate assignee and click this button to remove the assignee from the list.
Remove All	Click this button to remove all specified assignees from the list.

Notify Task Rule

If you are creating a Notify Task Rule, the Notify tab displays on the New Rule Properties dialog box.

Figure 3-8 New Rule Properties Dialog Box—Notify Tab



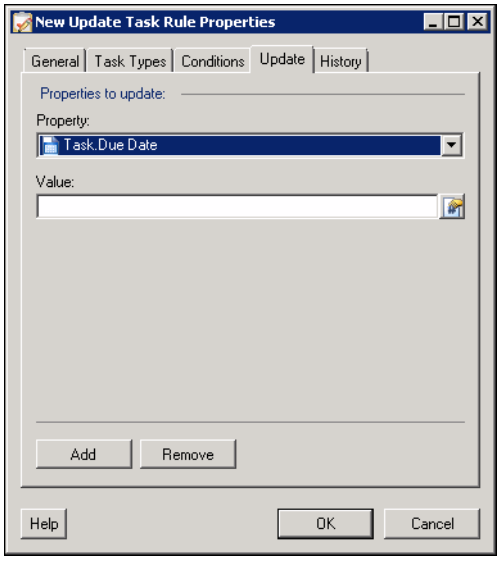
On the Notify tab, specify the recipients of the notification that the task rule has executed. You can add individual recipients or include a notification recipient list.

Field	Description
Add notification recipients	Displays list of users to be notified by the task rule • Add—Click this button to launch the Select Notification Recipient to Add dialog box to specify the recipients. On the dialog box, click the **Reference** tool to select the appropriate variable reference containing the recipient or list of recipients from the Insert Variable Reference dialog box and then click **OK**. • Edit—Select the appropriate recipient in the list and click this button to view or modify the recipient of the task rule. • Remove—Select the appropriate recipient in the list and click this button to remove the recipient from the list. • Remove All—Click this button to remove all specified recipients from the list.
Add notification recipient list	Click the **Reference** tool to select the appropriate variable reference containing list of recipients from the Insert Variable Reference dialog box.

Update Task Rule

If you are creating an Update Task Rule, the Update tab displays on the New Rule Properties dialog box.

Figure 3-9 New Rule Properties Dialog Box—Update Tab



On the Update tab, specify the properties to be updated after the task rule has executed.

Field	Description
Add	Click this button to add a new property to the Properties to update area.
Remove	Click this button to remove the last property added to the Properties to update area.
Property	From the Property drop-down list, choose the item to update within the task. The properties displayed depend on the selected item.
List action	Choose the appropriate item from the drop-down list to determine which action to take with the selected property: • Add Item—Adds item to task. • Remove item—Removes item from task. • Clear—Removes property value from task.
Value	Enter new value for the property.

Step 8 Click **OK** to save the task rule definition and close the dialog box.

Managing Task Rule Definitions

This section provides instructions on modifying task rules in the Definitions—Task Rule view. Only users with administrative rights can modify task rules in TEO.

Note For additional information on managing task rules, see the *Tidal Enterprise Orchestrator Reference Guide*.

Enabling a Task Rule

A task rule is enabled by default. If a task rule is manually disabled, the task rule must be enabled before it is available for execution.

On the Definitions—Task Rules view, select the task rule and then use one of the following methods to enable it:

- On the Results pane, right-click and choose **Enable**.

  -or-

- On the Details pane, select **Click here to enable**.

The Enabled column on the Results pane changes to True. If necessary, click the **Refresh** tool to update the view.

Disabling a Task Rule

Disabling a task rule prevents the item from being available for execution. The disabled task rule is not removed from the list of task rules on the Definitions—Task Rules Results pane.

On the Definitions—Task Rule view, select the task rule and then use one of the following methods to disable it:

- On the Results pane, right-click and choose **Disable**.

  -or-

- On the Details pane, select **Click here to disable**.

The Enabled column on the results pane changes to False. If necessary, click the **Refresh** tool to update the view.

Creating a Copy of a Task Rule

The copy option is used when the user wants to leverage an existing task rule to define a new task rule using existing properties.

Step 1 On the Definitions—Task Rules view, select the appropriate task rule, right-click and choose **Copy**.

Step 2 On the Results pane, right-click and choose **Paste**.

A copy of the defined task rule is pasted onto the Results pane.

Step 3 To rename the copied task rule or other properties, right-click and choose **Properties**.

Step 4 Modify the task rule name, as appropriate, and click **OK** to close the dialog box.

Sorting Task Rules

The task rules are executed according to the order they are listed on the Definitions—Task Rules view. You should sort the task rules based on the order in which you want them to execute.

Note All task rules will execute even if there is more than one task rule assigned for the same condition. For example, if you have two assignment rules for the same incident, both rules will be executed in the order listed in the Task Rules view.

On the Definitions—Task Rules view, select the task rule and use one of the following methods to move it to the desired position in the list:

- Drag and drop the task rule into the appropriate position in the list.
- On the Actions toolbar, click **Move Up** or **Move Down**.
- Click the Actions menu and choose **Move Up** or **Move Down**.
- Right-click and choose **Move Up** or **Move Down**.

The list of task rules are sorted according to the selected action.

Deleting a Task Rule

Use the Definitions—Task Rules view to delete task rules that are no longer used.

Step 1 On the Definitions—Task Rules view, select the task rule, right-click and choose **Delete**.

Step 2 On the Confirm Delete dialog box, click **Yes** to confirm the deletion.

Enabling Notification Based on Assignment Processes

If you want to have emails sent to whoever is assigned to a task but do not want to create notification task rules, you can enable the processes that ship with the Core automation pack that send emails based on assignment.

When these processes are enabled, the user or user group who was assigned tasks will receive the email notification.

Step 1 In the Definitions workspace, click **Processes**.

Step 2 Click the **Filter by** link and choose **Automation Pack > Core** to filter for the processes that ship with the Core automation pack.

Step 3 Right-click the appropriate **Notification Based on Assignment** process and choose **Enable**.

The following processes are for notification based on assignment:

Process Name	Description
Default Alert Notification Based on Assignment	Sends email when an alert gets assigned.
Default Approval Request Notification Based on Assignment	Sends email when an approval request gets assigned.
Default Change Request Notification Based on Assignment	Sends email when an change requests gets assigned.
Default Guided Operation Request Notification Based on Assignment	Sends email when a guide operation request gets assigned.
Default Incident Notification Based on Assignment	Sends email when an incident gets assigned.
Default Input Request Notification Based on Assignment	Sends email when an input request gets assigned.
Default Review Request Notification Based on Assignment	Send email when a review request gets assigned.

Managing Global Variables

The processes use global variables for information that is used on a regular basis to avoid having to specify the same information in several processes or activities. Some of the variables that ship with the automation packs are configured with default values but can be modified to meet the requirements for your specific environment. Other variables do not have default values defined and must be defined by the user before it can be used in the processes.

The BMC Remedy automation pack ships with global variables that must be configured with the values in Remedy before they can be used in the processes.

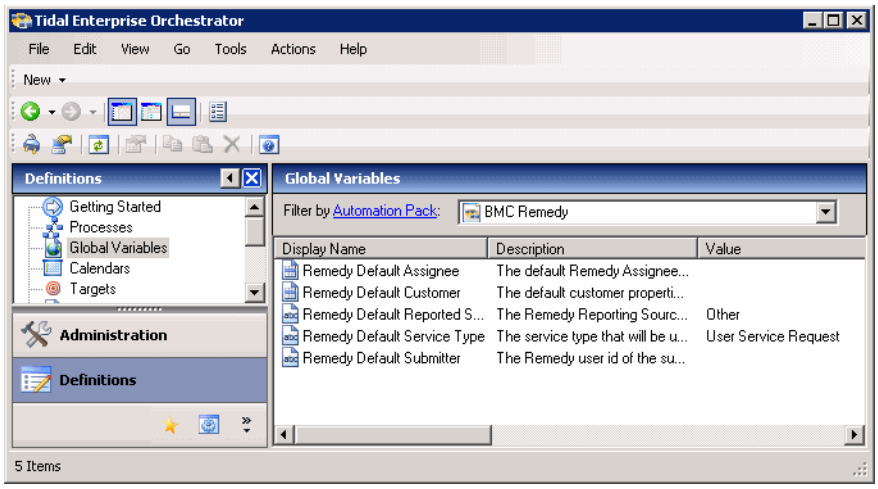
Accessing Global Variables

The global variables that ship with the BMC Remedy automation pack can be accessed from the Definitions—Global Variables view.

Step 1 On the Console, select the Definitions workspace and click **Global Variables** in the navigation pane. By default, all the variables display in the Global Variables pane.

Step 2 Click the **Filter by** link and choose **Automation Pack > BMC Remedy** to filter for only the global variables that ship with the specific automation pack.

Figure 3-10 Global Variables View



The following information about the variables displays by default:

Column	Description
Display Name	Name of the global variable.
Description	Brief overview of the global variable.
Value	Value of the variable.
Data Type	Type of value being used for the variable (Boolean, Encrypted String, Identity, Numeric, String, Table).
Automation Pack	Name of the automation pack that provides the object.

Column	Description
Last Modified Time	Time the global variable was last modified.
Last Modified By	Name of the user who last modified the global variable.

Configuring Global Variables

The following global variables must be configure prior to running the processes:

- Remedy Default Assignee
- Remedy Default Customer
- Remedy Default Submitter

The other global variables are shipped with default values but can be modified for your environment.

Remedy Default Assignee

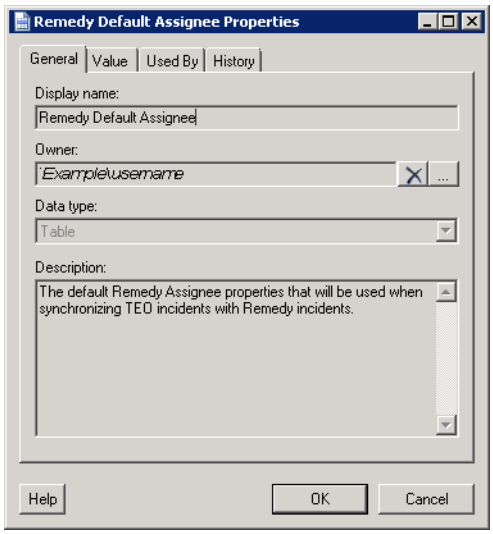
The Remedy Default Assignee global variable contains the default Remedy Assignee properties that will be used when synchonizing TEO incidents with Remedy incidents.

Step 1 In the Definitions view, click **Global Variables** in the navigation pane to display the variables in the Global Variables pane.

Step 2 Click the **Filter by** link and choose **Automation Pack > BMC Remedy** to filter for only the global variables that ship with the BMC Remedy automation pack.

Step 3 In the Global Variables pane, right-click the **Remedy Default Customer** global variable and choose **Properties**.

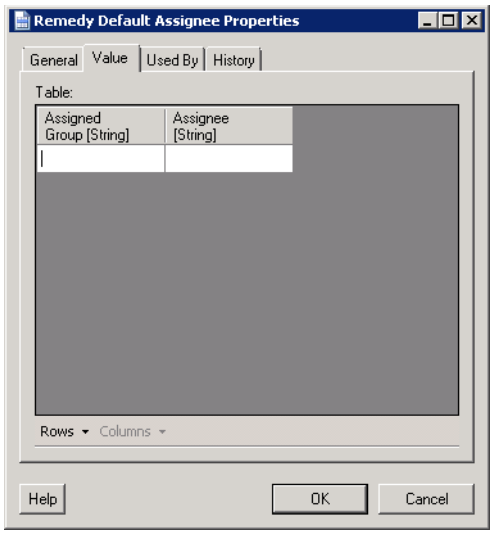
Figure 3-11 Remedy Default Assignee Properties—General Tab



Step 4 On the General tab, review the information in the Description field to determine the values that need to be configured.

Step 5 Click the **Value** tab.

Figure 3-12 Remedy Default Assignee Properties—Value Tab



Step 6 Click in the table row and specify the following information in the table:

Column	Description
Assigned Group	Enter the name of the group that is assigned the incident.
Assignee	Enter the person who is assigned the incident.

Step 7 Click **OK** to save the information and close the dialog.

Remedy Default Customer

The Remedy Default Customer global variable contains the default customer properties that will be used when synchonizing TEO incidents with Remedy incidents.

Step 1 In the Definitions view, click **Global Variables** in the navigation pane to display the variables in the Global Variables pane.

Step 2 Click the **Filter by** link and choose **Automation Pack > BMC Remedy** to filter for only the global variables that ship with the BMC Remedy automation pack.

Step 3 In the Global Variables pane, right-click the **Remedy Default Customer** global variable and choose **Properties**.

Step 4 On the General tab, review the information in the Description field to determine the values that need to be configured.

Step 5 Click the **Value** tab and specify the following information in the table:

Column	Description
Company	Enter the name of the company that submitted the Remedy ticket.
First Name	Enter the first name of the person who submitted the Remedy ticket.
Last Name	Enter the last name of the person who submitted the Remedy ticket.

Step 6 Click **OK** to save the information and close the dialog.

Remedy Default Submitter

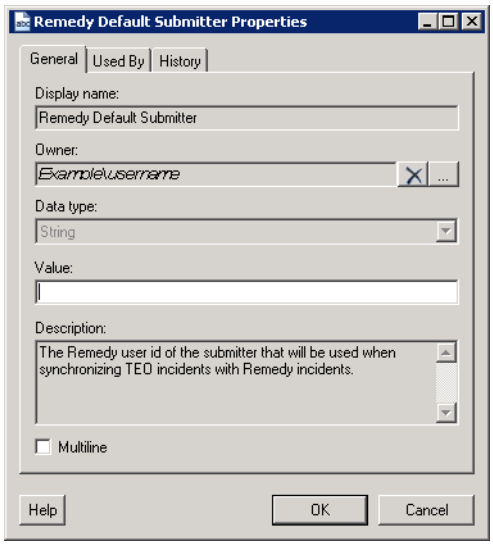
The Remedy Default Submitter global variable contains the Remedy User ID of the submitter that will be used when synchonizing TEO incidents with Remedy incidents.

Step 1 In the Definitions view, click **Global Variables** in the navigation pane to display the variables in the Global Variables pane.

Step 2 Click the **Filter by** link and choose **Automation Pack > BMC Remedy** to filter for only the global variables that ship with the BMC Remedy automation pack.

Step 3 In the Global Variables pane, right-click the **Remedy Default Submitter** global variable and choose **Properties**.

Figure 3-13 Remedy Default Submitter Properties—General Tab



Step 4 In the **Value** text field, enter the user ID for the submitter.

Step 5 Click **OK** to save the information and close the dialog.

CHAPTER 4

Managing BMC Remedy Processes

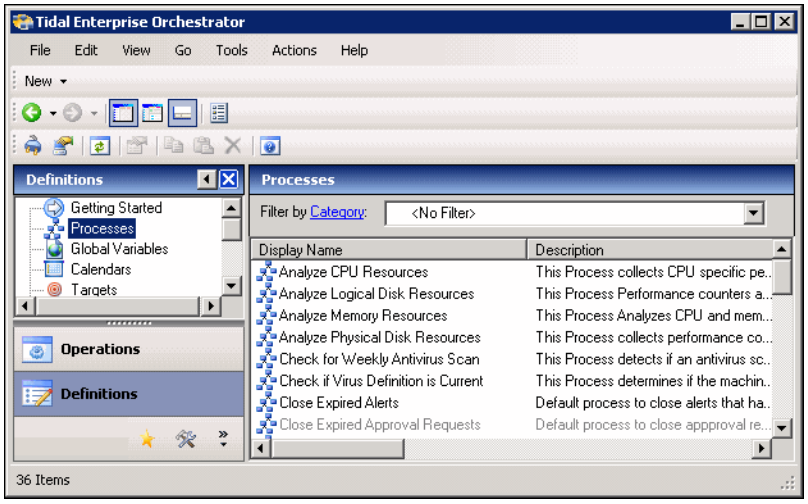
This chapter provides information on managing the BMC Remedy processes. It includes the following sections:

Accessing BMC Remedy Processes

The processes that ship with the product can be accessed from the Definitions—Processes view.

Step 1 On the Console, select the Definitions workspace and click **Processes** in the navigation pane. By default, all the processes display in the Processes pane.

Figure 4-1 Processes View

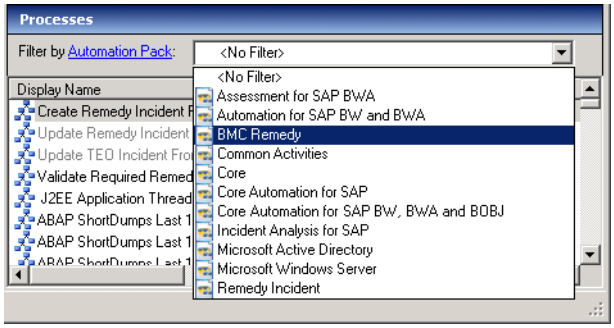


If you have multiple automation packs installed, you can filter the processes to display the processes specific to the automation pack.

Step 2 In the upper portion of the Processes pane, click the **Filter by** link and choose **Automation Pack**.

Step 3 In the drop-down list, choose **BMC Remedy**.

Figure 4-2 Filtering Processes by Automation Pack



The processes display in the Processes pane.

Managing BMC Remedy Processes

This section provides information on managing the BMC Remedy processes, including:

- Enabling and disabling processes
- Enabling and disabling the process archival feature
- Modify a process definition

Enabling a Process

Some of the processes that ship with the automation packs are disabled by default to reduce the load on the server or because they require customer-specific information prior to execution.

Note When the TEO server is used as the primary server and the Remedy server is the receiver, the Remedy incidents will be created and assigned as defined in the Remedy assignment rules.

You must enable the following processes for Remedy:

- Create Remedy Incident From TEO Incident
- One of the following processes:
  - Update Remedy Incident From Closed, Resolved or Cancelled TEO Incident
    -or-
  - Update TEO Incident From Closed or Resolved Remedy Incident

Note Only one of these processes can be enabled at any one time depending on which source is the primary source for managing incidents (normally this will be Remedy).

Perform the following steps to enable a process.

Step 1 In the Processes view, navigate to the process that you want to enable (disabled processes appear dimmed).

Step 2 Use one of the following methods to enable the process:

- Right-click the process and choose **Enable** from the submenu.
- In the Process Editor, click the **General** tab and then check the **Enabled** check box. Click the **Save** tool to save your changes to the process and close the Process Editor.

Disabling a Process

Disabling a process prevents the process from executing. You may want to disable some processes to reduce the load on your server or while you are modifying the process definition.

Perform the following steps to disable a process.

Step 1 In the Processes view, navigate to the process that you want to disable.

Step 2 Use one of the following methods to disable the process:

- Right-click the process and choose **Disable** from the submenu.
- In the Process Editor, click the **General** tab and then uncheck the **Enabled** check box. Click the **Save** tool to save your changes to the process and close the Process Editor.

Modifying a Process Definition

If you want to modify a process that ships with the BMC Remedy automation pack, you must first create a copy of the process and then modify the process definition of the copied process.

Copying a Process

Step 1 In the Processes pane, filter the processes to display the BMC Remedy processes.

Step 2 Scroll to the process you want to modify, right-click and choose **Copy**.

Step 3 Right-click in a blank area on the Processes pane, and choose **Paste**.

Step 4 On the Filter by link, click **Name** to locate the copied process.

Editing Process Definition

Once you have copied the example process, you can open the process in the Process Editor and edit the process properties.

Step 1 In the Processes pane, navigate to the copied process, right-click and choose **Edit**.

Step 2 On the Process Properties dialog box, click the tab for the information that you want to customize for the process definition:

- General—Enter a customized description for the process.
- Options—Modify the display, execution and archival options for the process.
- Target—Modify the target for the process. By default, the process is defined to execute on the target that is specified at start time (see Running Processes).
- Credentials—If you modify the target for the processes, use this tab to assign the appropriate runtime user account for the target.
- Variables—The example processes ship with pre-defined variables. You can add, delete or modify the variables for the process.
- Triggers—The example processes do not have triggers assigned. Use this tab to specify how or when the the process will execute.
- Categories—The copied process will be assigned to the same categories as the original process. You can create a new category using this tab.

Step 3 Modify the existing process workflow, if necessary, by adding activities or redefining the activity inputs.

Step 4 When you have completed your changes to the process, click the **Save** tool to save your changes and close the Process Editor.

Modifying Process Instance Archival

TEO provides an option in the process definition that allows you to choose whether or not to archive process and activity execution in the TEOProcess database. Disabling the **Archive completed instances** option helps improve performance and minimizes the size of the database. It is also useful when debugging the execution of processes.

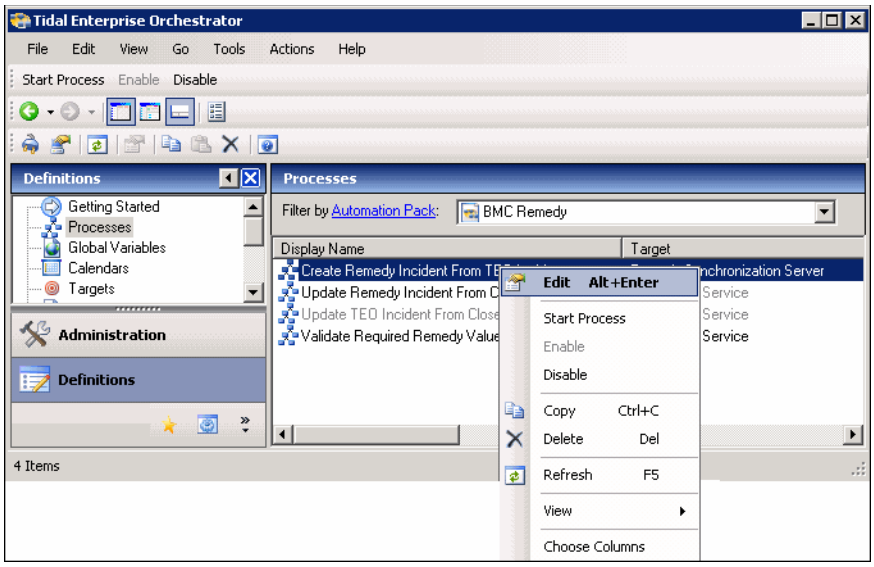
If you want to view the execution of a process and its activities, or view the process instances after a process has completed, the archival functionality must be enabled in the process definition.

Perform the following steps to enable or disable the archival feature.

Step 1 In the Processes view, navigate to the process you want to flag for archival.

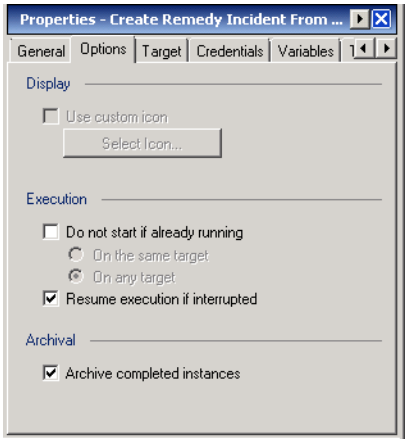
Step 2 Right-click the process and choose **Edit** from the submenu.

Figure 4-3 Opening a Process to Edit Properties



Step 3 On the process Properties dialog box, click the **Options** tab.

Figure 4-4 Process Properties—Options Tab



Step 4 On the Options tab, check the **Archive completed instances** check box to enable process instance archival.

If the process is already flagged for archival and you no longer want to save the process instances for this process, uncheck the check box.

Step 5 Click the **Save** tool to save your changes to the process and close the process Editor.

Running Processes

The processes that ship with the product will run based on the trigger that was defined in the process definition. The processes that ship with the BMC Remedy automation pack are triggered by the following:

- Creation of a TEO incident, which calls the Remedy Create Incident activity and sets the Remedy Incident Number of the Remedy incident into the TEO task. The TEO server name will be appended to the Remedy Reported Source default value.
- Modifications of a TEO incident containing a Remedy Incident Number. The change includes a field in the Remedy incident and calls the Remedy Modify Incident activity to make the corresponding change in the Remedy incident.
- Remedy Incident Modified Trigger monitoring Remedy incidents with the synchronization field set so that they have a corresponding TEO incident. The process synchronizes the changes made in Remedy to TEO.

This section guides you through viewing a process as it runs.

Note You can only view a running process and the process instances for processes that have the **Archive completed instances** feature enabled. *See* Modifying Process Instance Archival, page 4-4 for information on enabling the archival feature on a specific process.

Viewing Running Process

After the process is triggered, you can use the Process Viewer to view the process as it runs through each activity.

Note You can only view a running process and the process instances for processes that have the **Archive completed instances** feature enabled. *See* Modifying Process Instance Archival, page 4-4 for information on enabling the archival feature on a specific process.

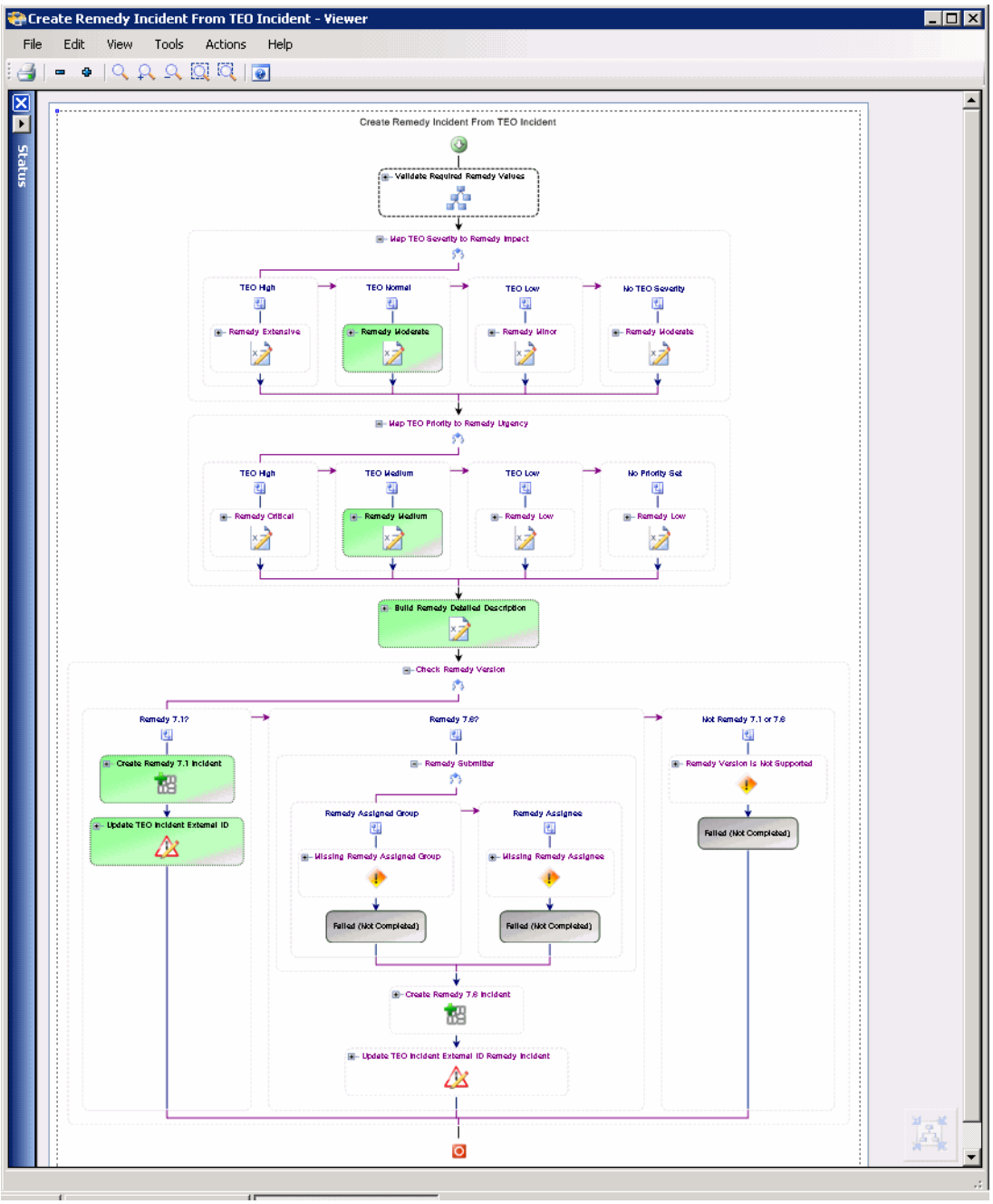
Step 1 In the Operations workspace, expand the Process Views folder and click **View Triggered**.

Step 2 Filter the processes by the BMC Remedy automation pack and then select the process in the details pane.

Step 3 In the View Results pane, right-click the process instance and choose **Observe** from the short-cut menu.

The Process Viewer displays the process workflow.

Figure 4-5 Process Viewer—Viewing Process Running



Step 4 View the process as it proceeds through the workflow.

The activities within the process workflow will change to green as they complete (succeed). If an activity fails, an incident is created.

Step 5 When the process completes, close the Process Viewer and proceed to Viewing Process Results, page 4-8.

Viewing Process Results

After a process completes, you can view the results in the Operations workspace. This section guides you through viewing the results from running a process.

Note You can only view a running process and the process instances for processes that have the **Archive completed instances** feature enabled. See Modifying Process Instance Archival, page 4-4 for information on enabling the archival feature on a specific process.

Accessing Process View

Step 1 On the Console, select the Operations workspace.

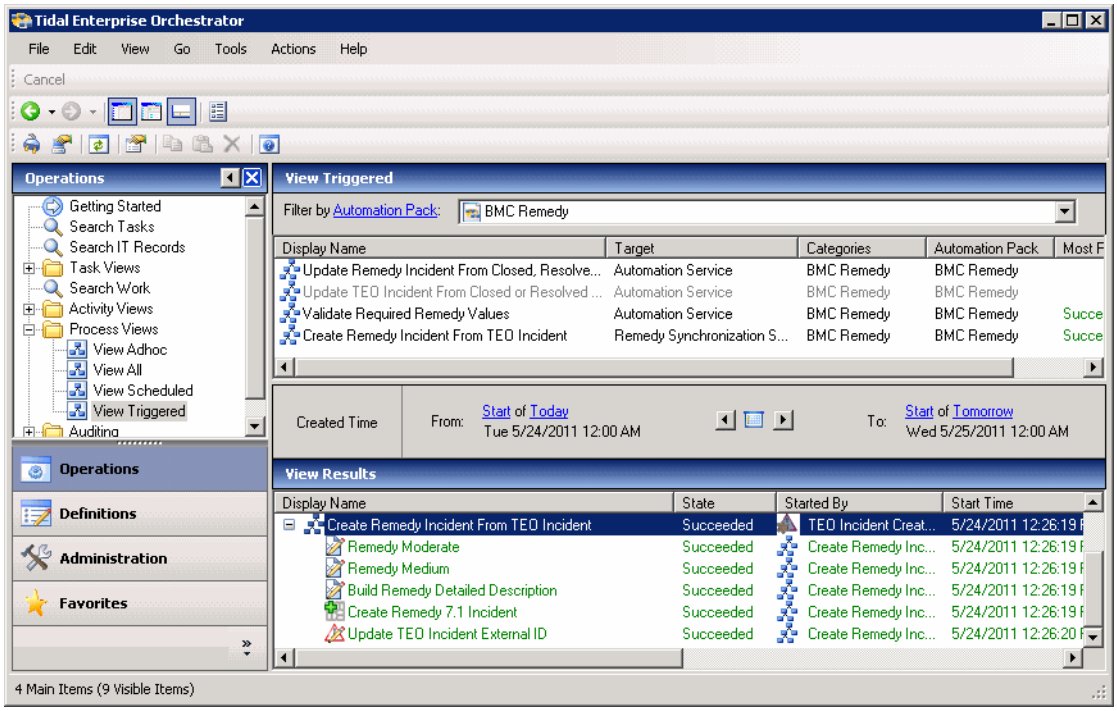
Step 2 In the navigation pane, expand **Process Views** and click **View Triggered** (since the process was triggered by an incident).

Step 3 Using the **Filter by** link, choose **Automation Pack** and then choose **BMC Remedy** from the drop-down list.

Step 4 Scroll to the process that was executed and select it.

Step 5 In the View Results pane, expand the process to view each activity in the process workflow.

Figure 4-6 Operations Workspace—Viewing Process Results



Step 6 Review the status of the process and each activity within the process to verify that it has succeeded.

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