Remedy
Local Administrators Guide
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Interface and Environment Orientations

Production Environment
You and your support providers can access the production server using a web browser with this URL:

http://cornell.onbmc.com

Test Environment
You and your support providers can access the test server using a web browser with this URL:

http://cornell-qa.onbmc.com

Changes made to production configuration data are not automatically moved to test. If you wish to have a current test environment it is necessary to make the changes in both places. Roughly twice a year the support team will schedule a “refresh” of test to ensure it stays usably in sync with production.

Logging in to Remedy ITSM
When you first login to the system you will be presented with your home page. This page provides you with a series of links that take you to different components of the ITSM suite.

Organizational Structure
Remedy uses two parallel hierarchical structures:

<table>
<thead>
<tr>
<th>Company</th>
<th>Support Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Support Organization</td>
</tr>
<tr>
<td>Department</td>
<td>Support Group</td>
</tr>
</tbody>
</table>

Company
Our Customer Company is “Cornell University.” Our Support Company is “Cornell University – IT.”

There are many settings, filters, and configuration data that are company specific.
**Organizations and Departments**

Remedy Organizations and Departments are data used to label customers. The typical organizations in a college would be “Administration” and “Academics.” Organizations will be defined centrally.

Within the organization “Administration” you would find departments like Information Technology, Human Resources, Facilities, and other units with administrative functions. Within the “Academic” organization you would find academic departments. Local Remedy administrators will define Departments and Support Groups for their Organization.

**Support Organizations and Support Groups**

Support Groups play a major role in the definition of your company. Where the Company field and Support Organization fields are organizational containers, Support Groups are the only place where Incidents can be assigned. You cannot assign an incident to a Support Organization or Company.
Creating Departments
The self-service tools for creating a department are not working, so local administrators will need to send a request to remedy-admin@cornell.edu to have departments created.

Creating Support Groups
1. Log into Remedy.
2. From the Applications tab, select Administrator Console, then Application Administration Console.

3. On the Standard Configuration tab, from the Configuration for Company drop-down list, select Cornell University – IT.
4. Next to Support Group, click Create. A small Support Group browser window will open. The Support Company field will be filled in.

5. From the Support Organization drop-down list, select your Support Organization.
6. Enter the name of the Support Group you wish to create.
7. For Support Group Role, select Help Desk.
8. Click Add.
9. If you wish to create additional Support Groups, repeat steps 6-8.
10. When finished, click Close.
People

Customer Data
There are two kinds of people in Remedy: support providers and customers. A nightly feed from Cornell’s directory servers imports everyone as a customer. Changes made in the directory will be reflected one day later in Remedy.

<table>
<thead>
<tr>
<th>Remedy Field Name</th>
<th>LDAP Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>givenName</td>
</tr>
<tr>
<td>Middle Name</td>
<td>cornelledumiddlename</td>
</tr>
<tr>
<td>Last Name</td>
<td>sn</td>
</tr>
<tr>
<td>ClientType</td>
<td>If cornelledutype = “Staff”, then value will be “Office-Based Employee”</td>
</tr>
<tr>
<td>Job Title</td>
<td>cornelleduwrkngtitle1</td>
</tr>
<tr>
<td>Nickname</td>
<td>edupersonnickname</td>
</tr>
<tr>
<td>Corporate ID</td>
<td>uid</td>
</tr>
<tr>
<td>Remedy Login ID</td>
<td>uid</td>
</tr>
<tr>
<td>Contact Type</td>
<td>cornelledutype</td>
</tr>
<tr>
<td>Company</td>
<td>Value will always be “Cornell University”</td>
</tr>
<tr>
<td>Business</td>
<td>cornellEduCampusPhone</td>
</tr>
<tr>
<td>Email Address</td>
<td>email</td>
</tr>
<tr>
<td>Desk Location &amp; Mail Stop</td>
<td>cornelleducampusaddress</td>
</tr>
<tr>
<td>Home Address</td>
<td>homePostalAddress</td>
</tr>
<tr>
<td>Home Phone Number</td>
<td>homePhone</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>mobile</td>
</tr>
<tr>
<td>Fax Number</td>
<td>facsimileTelephoneNumber</td>
</tr>
<tr>
<td>Pager Number</td>
<td>pager</td>
</tr>
<tr>
<td>Corporate Email</td>
<td>cornelleduprimaryemail</td>
</tr>
<tr>
<td>Accounting Code</td>
<td>cornelledudeptname1</td>
</tr>
</tbody>
</table>

The import from the directory will overwrite any changes made to these fields in Remedy except the Corporate Email field.

The import from the directory does not include Organization.

Support Provider Data
Notes:
- You cannot create an person in Remedy. Their record needs to be present in the LDAP directory and imported in the nightly update.
- There are more advanced Tech Support Provider settings that are not covered in this section. These instructions cover the common practices for setting up a standard TSP account.
Adding a new support provider's access rights

1. Log into Remedy.
2. From the Applications tab, select Incident Management, then Incident Management Console.
3. On the left, under Functions, click My Profile.
4. Click **New search** on the gray toolbar near the top of the form.

5. In the field labeled **Corporate ID**, enter the person’s NetID.

6. Click **Search** (at either the top or bottom of the form).
   
   If more than one record matches the string you entered in step 5, you’ll see a list of matches at the top of the screen. Click the entry for the correct person. For example, if you entered “pqs66,” the search would return both pqs66 and pqs665. Check the entries in the Name fields to be sure you’re working on the right entry.

7. Click the **Login/Access Details** tab on the light blue bar about halfway down the form.
8. Under the section labeled **Application Permission**, click **Update Permission Groups**. A small browser window will open. Add the following four permission groups:

![](image)

a. For **Permission Group**, select **Foundation**, then **Contact People User**. Click **Add/Modify**.
b. For **Permission Group**, select **Incident**, then **Incident User**. For **License Type**, select **Floating**. Click **Add/Modify**.
c. For **Permission Group**, select **Problem**, then **Problem User**. For **License Type**, select **Floating**. Click **Add/Modify**.
d. For **Permission Group**, select **Task**, then **Task User**. Click **Add/Modify**.
   Note: If you accidentally select the wrong group or license type, click **Clear**, then select again.

9. Click **Close** to close the small window.

10. Under the section labeled **Access Restrictions**, click **Update Access Restrictions**. A small browser window will open.

11. For **Access Restriction**, select **Operating Company**, then **Cornell University – IT**. Click **Add/Modify**.

12. Click **Close** to close the small window.

13. In the section labeled **Licensing Preferences**, for **License Type**, select **Floating**.

14. In the gray section labeled **People Information**, for **Support Staff**, select **Yes**.
15. Click the **Support Groups** tab on the light blue bar about halfway down the form.

16. Click **Update Support Groups and Roles**. A small browser window will open.

17. For **Company**, select **Cornell University – IT**.

18. Select the **Organization** followed by the **Support Group** you wish to add. The first group you add will become the support provider’s default group.

19. For **Relationship Role**, select **Member**.

20. Click **Add**.

21. To add more support groups for this person, repeat steps **18-20** as necessary.

22. Click **Close** to close the small window.

23. Click **Save** (at either the top or bottom of the form).
Removing an Employee’s access rights

1. Log into Remedy.

2. From the Applications tab, select Incident Management, then Incident Management Console.

3. On the left, under Functions, click My Profile.

4. Click New search on the gray toolbar near the top of the form.

5. In the field labeled Corporate ID, enter the person’s NetID.

6. Click Search (at either the top or bottom of the form).
   If more than one record matches the string you entered in step 5, you’ll see a list of matches at the top of the screen. Click the entry for the correct person. For example, if you entered “pq566,” the search would return both pq566 and pq565. Check the entries in the Name fields to be sure you’re working on the right entry.
7. At the left, click Other Functions to display the entries under that heading.

8. Click Change to Non Support. A small browser window will open, asking if you want to remove the person’s Login ID.

9. Click No. A Confirm Save Request dialog box will open.

10. Click Yes.

11. Click the Login/Access Details tab on the light blue bar about halfway down the form.

12. Under the section labeled Application Permission, click Update Permission Groups. A small browser window will open. Add the following two permission groups (it is possible that they will already be there):
   
   a. For Permission Group, select Asset, then Asset Viewer. Click Add/Modify.
   b. For Permission Group, select Request, then Service Request User. Click Add/Modify.

13. Click Close to close the small window.

14. Click Save (at either the top or bottom of the form).
Setting up “On Submit” & “On Resolve” Notifications to Customers

Customers submit incidents. The settings described here determine whether the customer receives an automated email message when the incident is created and/or when the incident is resolved.

By default, both notifications are sent to customers.

Most of the text in those messages is standardized across all units within the Cornell University “Company,” but following information on the notifications can be customized for each Support Group:

<table>
<thead>
<tr>
<th>Field in Remedy</th>
<th>Usage in the Notification Emails</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchange Group Account</td>
<td>The “From” address</td>
</tr>
<tr>
<td>Exchange Group Account Name</td>
<td>The descriptive text next to the “From” address</td>
</tr>
<tr>
<td>Group Web Address</td>
<td>The Support Group’s web address</td>
</tr>
<tr>
<td>Group Phone Number</td>
<td>The Support Group’s phone number</td>
</tr>
<tr>
<td>Special Notes (available on incident creation message only)</td>
<td>A block of text, which is added to the standard incident creation email</td>
</tr>
</tbody>
</table>
Configuring Notifications

1. Log into Remedy.
2. From the Applications tab, select Incident Management, then Incident Management Console.

3. On the left, under Functions, click My Profile.
4. Click the **Support Group** tab.

![Support Groups tab](image)

5. Select the support group for which you want to set group notifications.

6. Click **Modify Selected Support Group**.

7. Click the **Group Notification Settings** tab.

8. Make desired changes to the following fields:
   - Exchange Group Account
   - Exchange Group Account Name
   - Group Web Address
   - Group Phone Number
   - Special Notes
   
   If any of these fields are longer than about 30 characters, you can click on the page icon next to the field to see an expanded text entry box.

9. Check **On Submit** if you want the notification message sent to the customer on incident creation.

10. Check **On Resolve** if you want the notification message sent to the customer on incident resolution.

11. Click **Save**.
Standard Notification Templates

Shaded items are the ones you can modify using the preceding procedure.

Items in {{double curly brackets}} are filled in based on the incident elements.

On Submit notification

<table>
<thead>
<tr>
<th>From</th>
<th>Exchange Group Account Name</th>
<th>&lt;Exchange Group Account&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>{{Incident Number}} – {{Summary}}</td>
<td></td>
</tr>
</tbody>
</table>

Body

Hello Customer {{Firstname}} {{Lastname}},

We have received your request for service. A support person will respond to you as soon as possible.

Your request has been assigned a case number: {{Incident Number}}
Request date: {{Incident creation Date/Time}}
Original request: {{Incident Summary}}

Updates and additional questions regarding this incident are welcome. For faster service, always include your case number (Incident number) in the subject line of any related follow-up emails.

Special notes

Exchange Group Account Name
Group Web Address
Group Phone number

On Resolve notification

<table>
<thead>
<tr>
<th>From</th>
<th>Exchange Group Account Name</th>
<th>&lt;Exchange Group Account&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>{{Incident Number}} – {{Summary}}</td>
<td></td>
</tr>
</tbody>
</table>

Body

The following case has been marked as resolved.

Case number: {{Incident Number}}
Request date: {{Incident creation Date/Time}}
Original request: {{Incident Summary}}
Resolution: {{Incident Resolution}}

Please reply if you have any further questions, or if your case remains unresolved. For faster service, always include your case number (Incident number) in the subject line of any related follow-up emails.

Thank you,
Group Web Address
Group Phone number
Setting Up Incident Creation Notifications to Support Providers

By default, when an incident is created, Remedy sends notifications to all members of the appropriate Support Group. An alternative is to use group notifications to send these messages to an Exchange Group Account (EGA) or e-list address instead.

The settings in the following procedure take precedence over any settings on the Notification tab in a user’s profile.

To set up group notifications

1. Log into Remedy.
2. From the Applications tab, select Incident Management, then Incident Management Console.
3. On the left, under Functions, click My Profile.
4. Click the Support Group tab.

5. Select the support group for which you want to set group notifications.

6. Click Modify Selected Support Group.

7. Click the Group Notification Settings tab.

8. In the Group Email box, enter any combinations of
   - Exchange Group Account (EGA) addresses,
   - e-list addresses, and
   - email addresses.
   If you enter more than one address, separate addresses with a carriage return.
   **Leave this field blank to have Remedy use the default, which is to send notifications to all members of this Support Group.**

9. Click Save.

Note: Leave Disable Group Notifications option set to No.
Incident Templates

Best Practice
The values that the administrator configures in the template forms are used to add information to the Incident form. This allows support staff to use standard business processes and increase automation and value.

Support staff can select any of the templates that are available for their support group(s). Templates are useful in a request that follows well-defined methods for specific and repeated requirements. While you can create as many templates as you like, the best practice is to limit templates to standardized processes that your support staffs perform on a frequent basis.

Templates are also used by the Email process to create incidents. An association is made between your Exchange Group Account (EGA) and a template you specify at configuration.

When creating an incident or on existing incident, a Template can be selected using the Incident template field.

Creating/Modifying Incident Management Templates
1. Log into Remedy.
2. From the Applications tab, select Administrator Console, then Application Administration Console.

3. On the Application Administration Console, click the Custom Configuration tab.
4. Click the arrows to expand the hierarchy to Incident Management, then Template, then Template again.
5. Highlight the second Template (as shown here), then click Open.

6. From the **Viewing Templates for Support Group** drop-down, select the appropriate support group. The list of templates displays the templates for that support group.

7. Click **Create**. The **Incident Template** form opens.
   OR
   Select a template, and click **View** to modify that template.

8. In the **Template Name** field, type a brief descriptive name for the template.

9. From the **Template Status** drop-down, select **Enabled**, which indicates that the template is available for use in BMC Remedy Incident Management.

10. Select or create the appropriate template categorizations for **Tier 1**, **Tier 2**, and **Tier 3**.
    To create a template categorization, type the category name in the **Template Category** field. When you save the template, the category name is also saved and added to the field's selection list, where it is available to select when you create the next template.

11. Configure Classification settings.
    a. Click the **Classification** tab.
    b. From the **Impact** list, select an impact level that is created when the template is used.
    c. From the **Urgency** list, select a level of urgency for the incident form.
       The **Priority** field will fill in automatically, based on the values of Impact and Urgency.
    d. From the **Incident Type** list, select the type of service that is recorded when the template is used.
    e. From the **Service** list, select the related business service CI, for example, **Email Service**.
    f. Click **Save**.

12. Configure Categorization settings.
    a. Click the **Categorization** tab.
    b. Select the appropriate **Operational Categorizations** for Tier 1, Tier 2, and Tier 3.
    c. Select the appropriate **Product Categorizations** for Tier 1, Tier 2, Tier 3, and Product.
    d. Enter **Product Name** and **Model/Version**.
    e. Click **Save**.
13. Configure assignment settings.
   a. Click the **Assignment** tab.
   b. To assign the incident to the user creating the incident, in the **Assign To Current User** field, select **Yes**.
      To assign it to someone else, use the following steps:
      i. In the **Support Company** field, select the company that incidents created from the template will be assigned to.
      ii. In the **Support Organization** field, select an organization.
      iii. In the **Assigned Group Name** field, select a group.
   c. Click **Save**.

   Typically, you use this tab only when creating templates for incidents that can be resolved when they are recorded. For example, this might be used for frequently asked questions, such as how to change your password.

   **Tip:** The resolution details can remind support staff of the steps to resolve an issue. For example, the details could list all the places to check for a paper jam on a printer.

   a. On the **Incident Template** form, click the **Resolution** tab.
   b. In the **Resolution** field, type the steps that resolve the incident.
   c. From the **Resolution Method** list, select **On-Site Support**, **Service Desk assisted**, **Self-Service**, or **Remote Control** as appropriate.
   d. Click **Save**.

15. Set groups that can use the template.
   The template authoring group specifies the group that can modify this template. If you have the Support Group Admin functional role or the Incident Config permission, you can assign the template authoring group to any group.

   a. On the **Incident Template** form, click the **Authoring Group** tab.
   b. Click **Update**. The **Template Support Group Association** dialog box appears.
   c. Select the **Company**, **Support Organization**, and **Support Group**.
   d. Click **Add**.
   e. (optional) Repeat steps 13c & 13d to add another group.
   f. Click **Close**, then click **Save**.
Email Templates

Email templates (also referred to as predefined replies or standard emails) are used to respond to a common question or problem. They are also used by the email process to create incident sends to a mailbox.

Regular users can create Individual templates, which they can use when responding to an incident.

A user with the functional role of Support Group Manager, Support Group Lead, or Support Group Admin can also create Group templates, which will be available to any member of their support group.

Creating Email Templates

There are two methods for creating an Email Template. The first method involves creating it before you need it. The second method allows you to turn any email response into a template.

Method One: Create a Template Before You Need It

1. Log into Remedy.
2. From the Applications tab, select Incident Management, then Incident Management Console.
3. On the left, under Functions, click Manage Email Templates. The Email Template Console will open.

Method Two: Create a Template from an Email Response

1. Log into Remedy.
2. From the Applications tab, select Incident Management, then Incident Management Console.
3. On the left, under Functions, click Manage Email Templates. The Email Template Console will open.
4. Click the Create new button to create a new template.

In the template, you can add any text you want. You can also add variables to the template, such as the incident ID or the problem description.

5. Click the Save button to save the template.

Now, whenever you need to respond to a similar incident, you can select the template you created and fill in the variables, saving time and ensuring consistency in your responses.
4. Enter an **Email Template Title** and the **Email Body** text.

5. From the **Status** drop-down list, select **Active**.

6. For **Template Type**, select **Group** or **Individual**.
   (Only Support Group Managers, Leads, and Admins can select Group.)

7. Click **Create**.

   If you selected **Group** and you are the manager, admin, or lead for more than one group, you will need to select the support group for which the template is available.
Method Two: Turn an Email Response Into a Template

You can also create a template while working in the Email form. This is useful when you find yourself creating an individual reply that you can foresee using again.

1. Open an incident.
2. Under **Functions** (on the left), click **Email System**. The Email System window will open.

3. In the **Email Information** section, enter the **Email Message Body** text.
4. Click **Create Email Template**. An **Email Template** form will open with the **Email Body** field filled in with the text from your email message.
5. Enter an **Email Template Title**.
6. From the **Status** drop-down list, select **Active**.
7. For **Template Type**, select **Group** or **Individual**.
   (Only Support Group Managers, Leads, and Admins can select Group.)
8. Click **Save** (at the upper left corner of the form).
Modifying Email Templates

1. Log into Remedy.
2. From the Applications tab, select Incident Management, then Incident Management Console.
3. On the left, under Functions, click Manage Email Templates. The Email Template Console will open.
4. In the Email Templates table at the top of the screen, click on the template you want to edit. The fields on the lower part of the screen will show you the information for that template.
5. Edit the Title, Body, Status, and/or Type information as desired.
6. Click Save.
Using Email Templates

1. Open an incident.
2. Under *Functions* (on the left), click *Email System*. The Email System window will open.

3. In the *Email Information* section, click the arrow at the right end of the *Email Template* field.
4. From the menu that appears, select *Group* or *Individual*, then select the desired template. The body text for that template will be pasted into the *Email Message Body* field, after any text already in the body.

You can select more than one template by repeating the step 4. Each time, the body text for the selected template will be added to the end of the text already captured in the *Email Message Body* (regardless of where you have placed the insertion point).