Remedy
Local Administrators
Guide

Remedy version 2.4
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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 a 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 “pq66,” the search would return both pq66 and pq665. 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:

   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 “pq66,” the search would return both pq66 and pq665. 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 Groups tab.

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

6. Click Modify Selected Support Group.
7. Click the Cornell Custom Options tab. Modify the fields on this tab as desired. If your text is longer than about 30 characters, click the page icon next to the field to see an expanded text entry box.

8. Exchange Group Account Email (will appear in notification emails)

9. Exchange Group Account Name (will appear in notification emails)

10. Group Web Address (will appear in notification emails)

11. Group Phone Number (will appear in notification emails)

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

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

14. On Submit Special Notes: If you have checked Customer Notification On Submit, the text you enter here will appear in the message the customer receives.)

15. Survey On Resolved: If you have checked Customer Notification On Resolve AND you check Survey On Resolved, a link to a short feedback survey will be added to the message the customer receives.)

16. If you have checked Survey On Resolved, enter the Number of Survey Questions.

17. If you have checked Survey On Resolved, enter the Survey URL (the URL will begin with qualtrics.cornell.edu)

18. Check Customer Notification On Support Staff Email Update if you want the customer to receive an email update when support staff update an incident through email.

19. Click Save.

In Qualtrics surveys, the following embedded fields can be defined:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC</td>
<td>Incident Number</td>
</tr>
<tr>
<td>Bserv</td>
<td>Business Services</td>
</tr>
<tr>
<td>Prod</td>
<td>Product Name</td>
</tr>
<tr>
<td>Owngr</td>
<td>Incident Owner Support Group</td>
</tr>
<tr>
<td>Ownorg</td>
<td>Incident Owner Organization</td>
</tr>
<tr>
<td>Sptgroup</td>
<td>Assigned Support Group</td>
</tr>
<tr>
<td>Sptor</td>
<td>Assigned Support Organization</td>
</tr>
<tr>
<td>Assignee</td>
<td>Assignee</td>
</tr>
<tr>
<td>Opcat</td>
<td>Tier 1 Operational Category</td>
</tr>
<tr>
<td>Subdate</td>
<td>Submit Date</td>
</tr>
<tr>
<td>Resdate</td>
<td>Resolution Date</td>
</tr>
<tr>
<td>Reportsrc</td>
<td>Reported Source</td>
</tr>
</tbody>
</table>

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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>
<tr>
<td>Body</td>
<td>Hello Customer {{Firstname}} {{Lastname}},</td>
<td></td>
</tr>
</tbody>
</table>

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 without survey

<table>
<thead>
<tr>
<th>From</th>
<th>Exchange Group Account Name &lt;Exchange Group Account&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>{{Incident Number}} – {{Summary}}</td>
</tr>
<tr>
<td>Body</td>
<td>The following case has been marked as resolved.</td>
</tr>
</tbody>
</table>

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,

Exchange Group Account Name
Group Web Address
Group Phone Number

On Resolve notification with survey URL

<table>
<thead>
<tr>
<th>From</th>
<th>Exchange Group Account Name &lt;Exchange Group Account&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>{{Incident Number}} – {{Summary}}</td>
</tr>
<tr>
<td>Body</td>
<td>The following case has been marked as resolved.</td>
</tr>
</tbody>
</table>

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

Please give us feedback with a <Number of survey question> question survey by clicking the link below. Please do not send it to anyone else, because this URL links the survey to your individual case information.

<Survey Link Here>

We value your input and will use it to improve our service to you and to measure customer satisfaction.

Thank you,

Exchange Group Account Name
Group Web Address
Group Phone Number
Configuring Required Fields “On Resolve”

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 Groups tab.
5. Select the support group for which you want to set group notifications.
6. Click Modify Selected Support Group.
7. Click the **Cornell Custom Options** tab.
8. Check **Tier 1 OpCat** if a Tier 1 Operational Category is required when resolving an incident.
9. Check **Tier 1 ProdCat** if a Tier 1 Product Category is required when resolving an incident.
10. Click **Save**.
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 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. You can create as many templates as you want. But the best practice is creating templates only for standardized processes that your support staffs perform on a frequent basis.

Templates are also used by the Email process to create incident. 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, on the **Custom Configuration** Tab, select **Incident Management > Template > Template** and click **Open**.

4. 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.

5. Click **Create**. The Incident Template form opens

   **OR**

   Select a template, and click **View** to modify a template.
6. In the **Template Name** field on the Incident Template form, type a brief descriptive name for the template.

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

8. 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.

9. **Configure classification settings**

   9.1. On the Incident Template form, click the **Classification** tab.
   
   9.2. From the **Impact** list, select an impact level for the incident form that is created when the template is used.
   
   9.3. From the **Urgency** list, select a level of urgency for the incident form.
   
   9.4. The **Priority** value is based on the impact and urgency.
   
   9.5. From the **Incident** Type list, select the type of service that is recorded when the template is used.
   
   9.6. From the **Service** list, select the related business service CI, for example, **Email Service**.
   
   9.7. Click **Save**.
10. **Configure Categorization settings**
   10.1. On the Incident Template form, click the **Categorization** tab.
   10.2. Select the appropriate **operational categorizations** for Tier 1, Tier 2, and Tier 3.
   10.3. Select the appropriate **product categorizations** for Tier 1, Tier 2, Tier 3, Product
   10.4. Enter **Product Name, and Model/Version**.

11. **Configure assignment settings**
   11.1. On the Incident Template form, click the **Assignment** tab.
   11.2. To assign the incident to the user creating the incident, in the **Assign To Current User** field, select **Yes**. Otherwise, use the following steps for assignment settings:
       11.2.1. In the **Support Company** field, select the **company** that incidents created from the template will be assigned to.
       11.2.2. In the **Support Organization** field, select an **organization**.
       11.2.3. In the **Assigned Group Name** field, select a **group**.
   11.3. Click **Save**.

12. **Configure resolution settings**
    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.
    12.1. On the Incident Template form, click the **Resolution** tab.
    12.2. In the **Resolution** field, type the steps that resolve the incident.
    12.3. From the **Resolution Method** list, select **On-Site Support, Service Desk assisted, Self-Service, or Remote Control**.
    12.4. Click **Save**.

13. **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.
    13.1. On the Incident Template form, click the **Authoring Group** tab.
    13.2. Click **Update**.
    13.3. The **Template Support Group Association** dialog box appears.
    13.4. To add groups that can use this template, follow these steps:
    13.5. Select the **company, support organization, and support group**.
    13.6. Click **Add**.
    13.7. 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.
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).