BMC Remedyforce 20.12.02.017.008

Getting Started Guide

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www.bmc.com

Contacting BMC Software

You can access the BMC Software website at http://www.bmc.com. From this website, you can obtain information about the company, its products, corporate offices, special events, and career opportunities.

United States and Canada

Address	BMC SOFTWARE INC 2101 CITYWEST BLVD HOUSTON TX 77042-2827 USA	**Telephone**	713 918 8800 or 800 841 2031	**Fax**	713 918 8000

Outside United States and Canada

Telephone	(01) 713 918 8800	**Fax**	(01) 713 918 8000

If you have comments or suggestions about this documentation, contact Information Design and Development by email at doc_feedback@bmc.com.

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Chapter

1 Setting up and configuring BMC Remedyforce

This section describes how to set up and configure BMC Remedyforce.

The following topics are provided:

- Setting up the required profiles (page 6)
- Installing the managed package (page 11)
- Configuring the permissions for profiles with the Chatter Only license (page 15)
- Assigning permission sets (page 21)
- Enabling feed tracking for Salesforce Chatter (page 23)
- Setting up the required queues (page 24)
- Setting up the default business hours and holidays of your organization (page 27)
- Setting up Self Service (page 27)
- Setting up a Force.com Site for the BMC Login page (page 35)
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Setting up the required profiles

You must create the ServiceDesk Staff, ServiceDesk Client, and ServiceDesk Change Manager profiles and associate your user account to a role before you install the managed package.

NOTE

For all the profiles that you create to access BMC Remedyforce (that also have Salesforce user license), ensure that for each profile, the **View Setup and Configuration** check box in the **Administrative Permissions** section is selected.

▶ To set up the ServiceDesk Staff profile

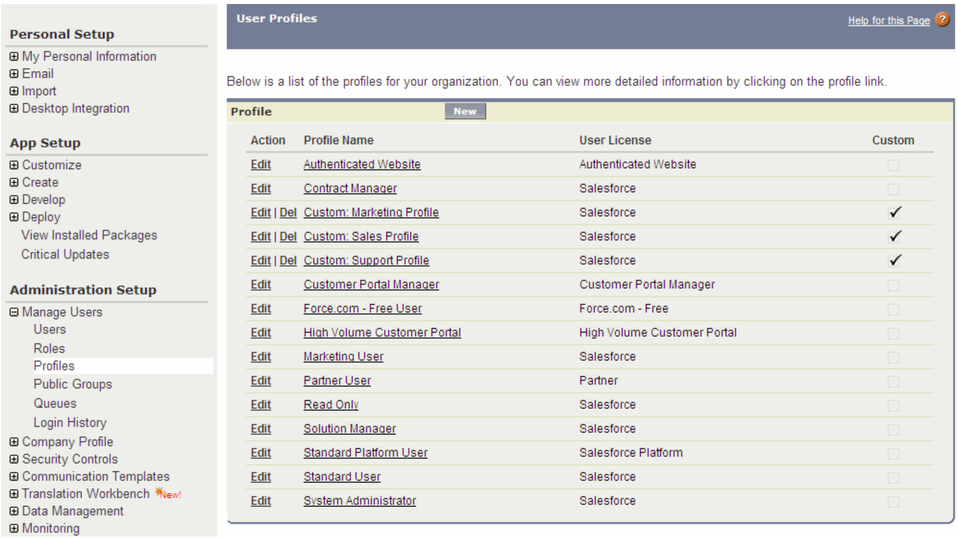
1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 To create the ServiceDesk Staff profile, perform the following actions:

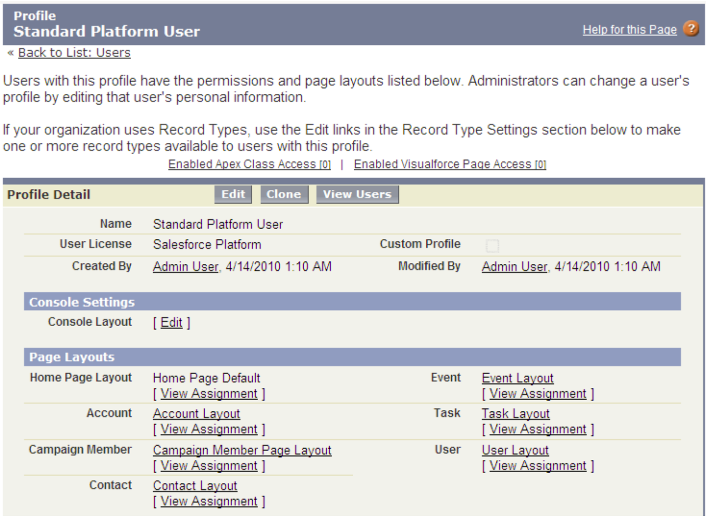
a Navigate to **Setup > Administration Setup > Manage Users > Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.



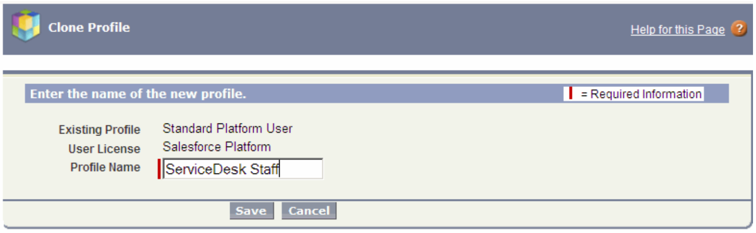
b In the **Profile Name** column, click the **Standard Platform User** profile.

The details of the Standard Platform User profile are displayed.



c Click **Clone**.

d In the **Profile Name** field, type `ServiceDesk Staff`.



e Click **Save**.

▶ To set up the ServiceDesk Client profile

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2 To create the ServiceDesk Client profile, perform the following actions:

a Navigate to **Setup > Administration Setup > Manage Users > Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.

b In the **Profile Name** column, click the **Standard Platform User** profile.

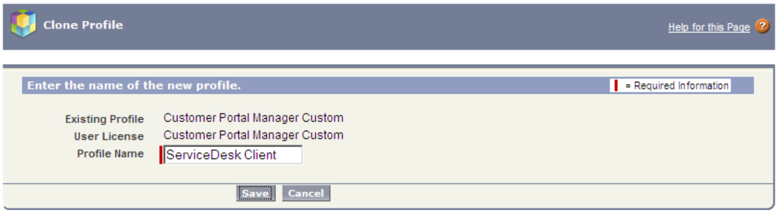
You can also clone profiles with the following licenses:

- Salesforce
- Chatter Only—Chatter Only is available only if the Chatter Only license is provisioned for your Salesforce organization.

The details of the Standard Platform User profile are displayed.

c Click **Clone**.

d In the **Profile Name** field, type `ServiceDesk Client`.



e Click **Save**.

3 To assign a role to your system administrator account, perform the following actions:

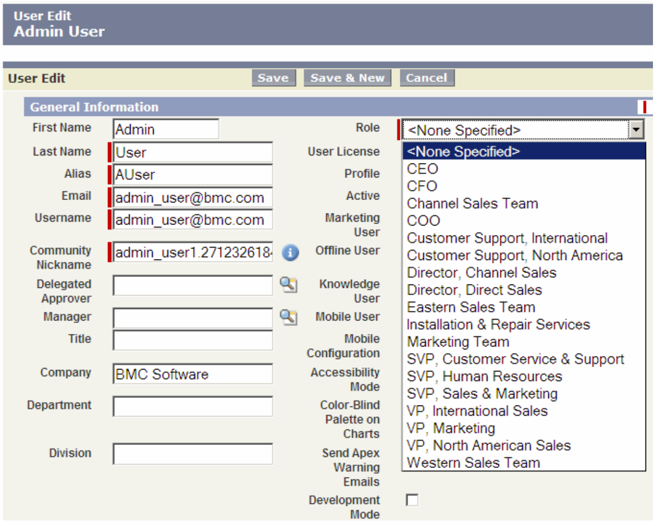
NOTE

If your Salesforce.com organization does not have roles, create the required roles. For more information about creating a role, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_roles.htm&loc=help&hash=heading_2_1`.

a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Users**.

b In the **Action** column, click **Edit**.

c In the General Information section, from the **Role** list, select a role.



d Click **Save**.

NOTE

When you create a client and associate a BMC Remedyforce organization with the client, the Main Contact (owner) of the BMC Remedyforce organization must have a role in the Salesforce.com role hierarchy of the organization. For more information, see the *Creating client records* section of the BMC Remedyforce Online Help.

▶ To set up the ServiceDesk Change Manager profile

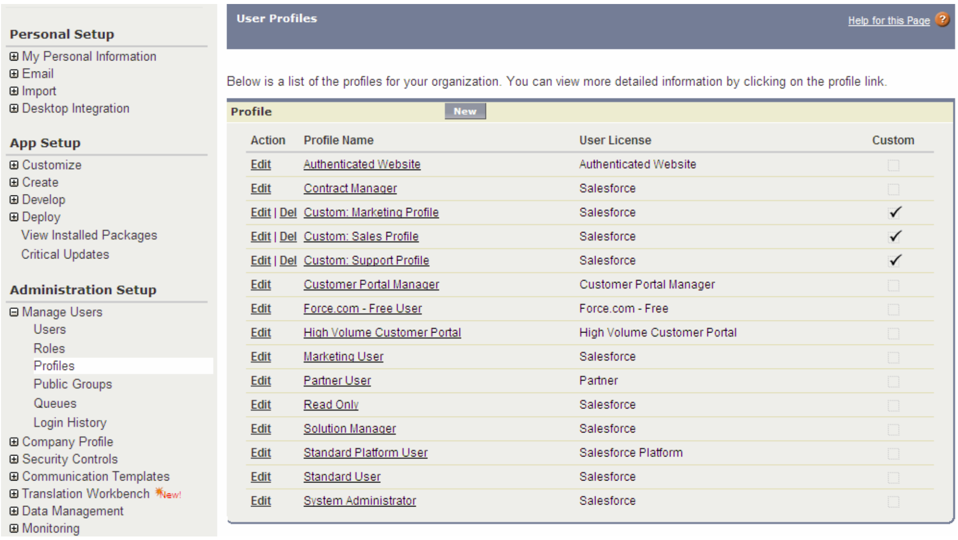
1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 To create the ServiceDesk Change Manager profile, perform the following actions:

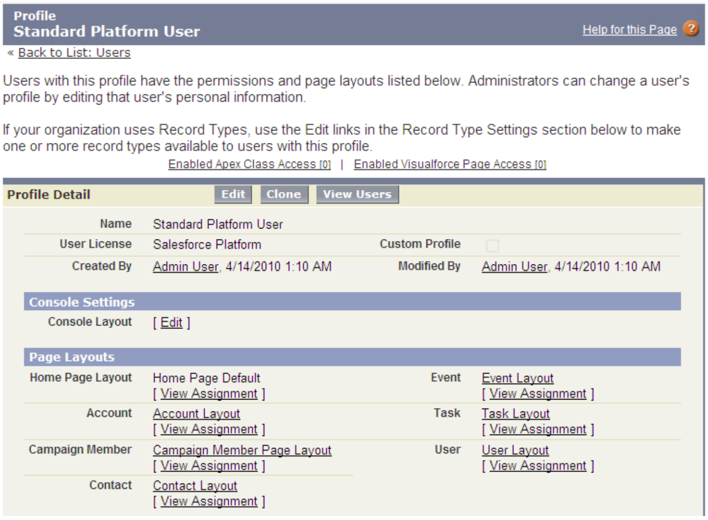
a Navigate to **Setup > Administration Setup > Manage Users > Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.



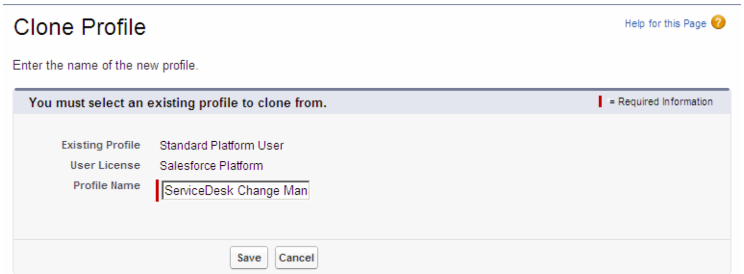
b In the **Profile Name** column, click the **Standard Platform User** profile.

The details of the Standard Platform User profile are displayed.



c Click **Clone**.

d In the **Profile Name** field, type `ServiceDesk Change Manager`.



3 Click **Save**.

Installing the managed package

After you set up the required profiles, you can install the managed package.

▶ To install the managed package

1 In the email that contains the URL to the managed package, click the URL to access the managed package.

2 In the Log In page, log on to your Salesforce.com organization as a user with administrative permissions.

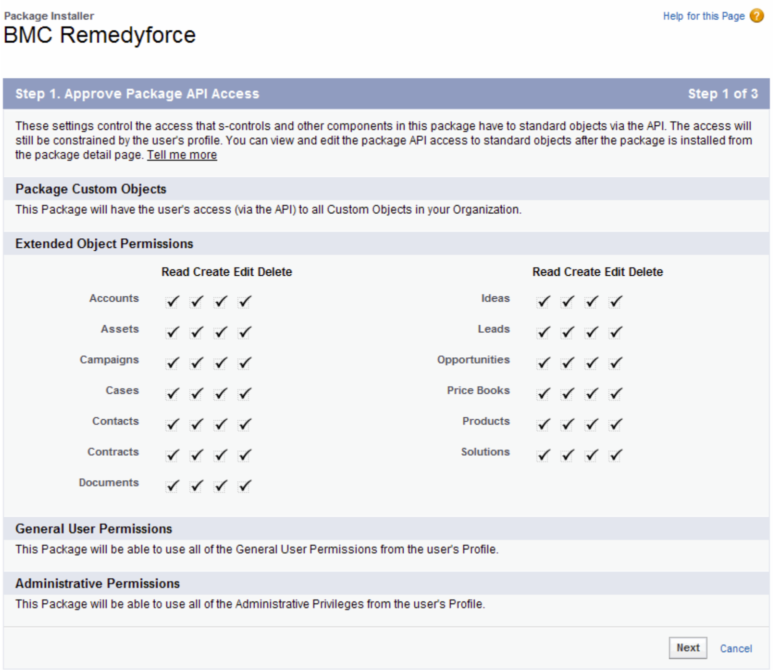
For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

3 Click **Submit**.

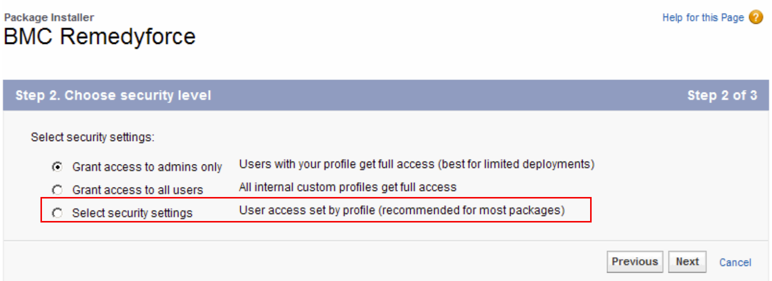
4 In the Package Installation Details section, click **Continue**.

5 In Step 1. Approve Package API Access of the Package Installer wizard, click **Next**.

No actions are required for step 1 of the Package Installer wizard.



6 To configure the access level for the profiles in your Salesforce.com organization, in Step 2. Choose Security Level of the Package Installer wizard, click the **Select security settings** option.

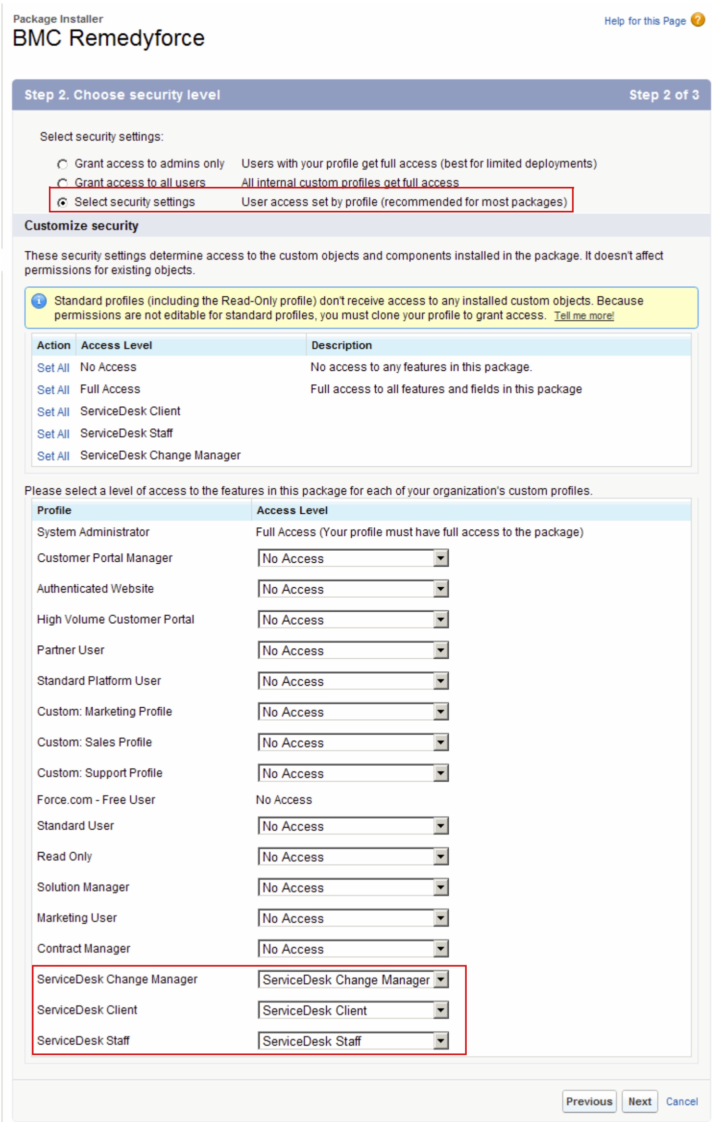


7 In the Customize security section, perform the following actions:

- For the ServiceDesk Change Manager profile, from the **Access Level** list, select **ServiceDesk Change Manager**.
- For all ServiceDesk Client profiles, from the **Access Level** list, select **ServiceDesk Client**.
- For the ServiceDesk Staff profile, from the **Access Level** list, select **ServiceDesk Staff**.
- For the rest of the profiles, leave the default value of **No Access**.

NOTE

If you are an existing Salesforce customer and have custom profiles, assign the level of access that is appropriate to the custom profiles.



8 Click **Next**.

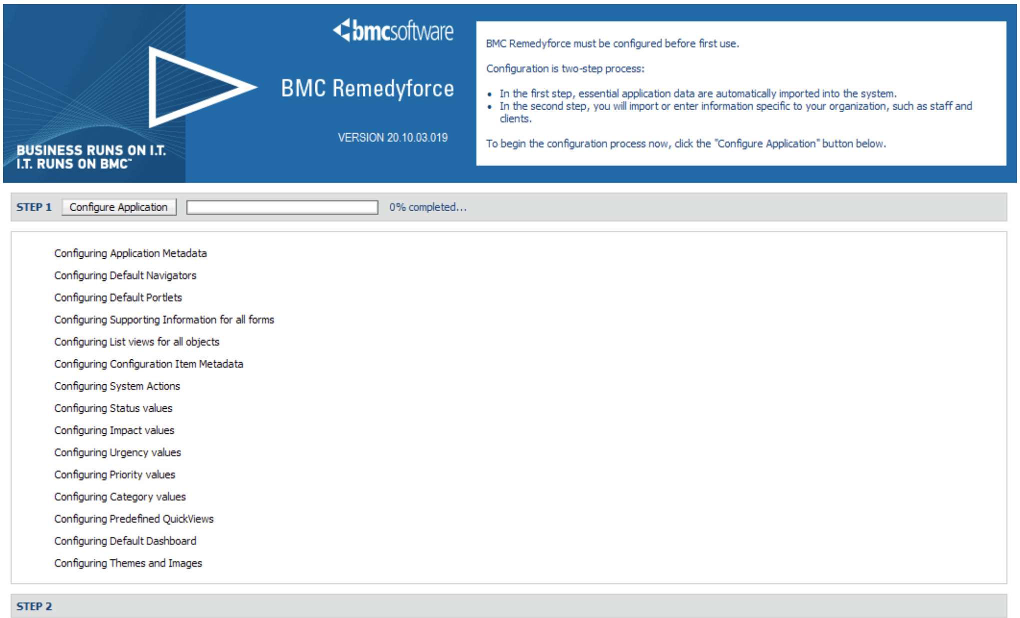
9 In Step 3. Install Package of the Package Installer wizard, click **Install**.

When the installation is complete, you receive an email.

10 Click any of the following tabs:

- Remedyforce Administration
- Remedyforce Workspaces
- Remedyforce CMDB
- Remedyforce Self Service
- BMC Remedyforce Home
- Remedyforce Dashboards

11 In the Configuration page, click **Configure Application**.



The required application data is imported into the system.

12 In the step 2 section, click the **Launch BMC Remedyforce** link to go to the **Dashboard** tab.

Configuring the permissions for profiles with the Chatter Only license

During the package installation, you cannot assign the **ServiceDesk Client** level of access to Chatter Only (also known as Chatter Plus) profiles. You must configure the **ServiceDesk Client** permissions for the Chatter Only (also known as Chatter Plus) profiles after you complete the installation.

▶ To configure permissions for profiles with the Chatter Only license

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2. Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.
3. In the **Action** column next to the profile with the Chatter Only license, click **Edit**.
4. In the Custom App Settings section, select the **BMC Remedyforce** check box.
5. In the Standard Tab Settings section, select **Default On** for the **Chatter** tab.
6. In the Custom Tab Settings section, select **Default On** for the **Remedyforce Self Service** tab.
7. For the remaining tabs in the Custom Tab Settings section, select **Tab Hidden**.

8 To grant the required permissions to the profile with the Chatter Only license for custom objects, perform the following actions:

a Ensure that the **Read** check box is selected for the following custom objects:

- Agreements
- Agreement Histories
- Base Elements
- Broadcasts
- Broadcast Account Link
- Business Services
- Categories
- Change Assessments
- Change Histories
- Change Requests
- CI Client Link
- Configuration Item Histories
- Custom Actions
- Entitlements
- FAQs
- FAQ Categories
- Fulfillment Inputs
- Fulfillment Mappings
- Impacts
- Incident Histories
- Knowledge Articles
- SYSPopupObject
- Process Controls
- Request Definitions
- SelfService Images
- SelfService Themes
- Service Targets
- Service Target Criteria
- SLA Milestones
- SLA Milestone Actions
- SLA Relations
- Status
- Urgencies

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Agreements	✓					
Agreement Histories	✓					
Base Elements	✓					
Broadcasts	✓					
Broadcast Account Link	✓					
Business Services	✓					
Categories	✓					
Change Requests	✓					
Change Request Service Targets	✓	✓	✓			
CI Client Link	✓					
Configuration Item Histories	✓					
Custom Actions	✓					
CustomAttachment	✓	✓				
Entitlements	✓					
FAQs	✓					
FAQ Categories	✓					
Fulfillment Inputs	✓					
Fulfillment Mappings	✓					
Impacts	✓					
Incidents	✓	✓	✓			
Incident Histories	✓					
Incident Service Targets	✓	✓	✓			

	Basic Access			
	Read	Create	Edit	Delete
Knowledge Articles	✓			
Knowledge Articles Viewed	✓	✓	✓	✓
Knowledge Feedback	✓	✓	✓	
Knowledge Incident Links	✓	✓	✓	
SYSPopupObject	✓			
Process Controls	✓			
QuickLinks	✓	✓		
Request Definitions	✓			
Request Details	✓	✓	✓	
Request Detail Inputs	✓	✓	✓	
SelfService Images	✓			
SelfService Themes	✓			
Service Targets	✓			
Service Target Criteria	✓			
SLA Milestones	✓			
SLA Milestone Actions	✓			
SLA Milestone Change Transactions	✓	✓	✓	
SLA Milestone Incident Transactions	✓	✓	✓	
SLA Relations	✓			
Status	✓			
Tasks	✓	✓		
Urgencies	✓			

b Ensure that the **Read** and **Create** check boxes are selected for the following custom objects:

- CustomAttachment
- Quick Links
- Tasks

c Ensure that the **Read**, **Create**, and **Edit** check boxes are selected for the following custom objects:

- Change Request Service Targets
- Incidents
- Incident Service Targets
- Knowledge Feedback
- Knowledge Incident Links
- Request Details
- Request Detail Inputs
- SLA Milestone Change Transactions
- SLA Milestone Incident Transactions

d Ensure that the **Read**, **Create**, **Edit,** and **Delete** check boxes are selected for the Knowledge Articles Viewed custom object.

e Click **Save**.

9 To assign the correct layouts to the profile with the Chatter Only license, perform the following actions:

a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

b In the **Profile Name** column, click the name of the profile with the Chatter Only license.

c For the Home Page Layout in the Standard Object Layouts section, click the **View Assignment** link.

d Click **Edit Assignment**.

e Select the required profiles with the Chatter Only license.

f From the **Page Layout To Use** list, select **Remedyforce Client Home**.

g Click **Save**.

h Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

i In the **Profile Name** column, click the name of the profile with the Chatter Only license.

j For the Change Request object in the Custom Object Layouts section, click the **View Assignment** link.

k Click **Edit Assignment**.

l Select the required profiles with the Chatter Only license.

m From the **Page Layout To Use** list, select **Remedyforce Change for Clients Version 1.0**.

To view the details of the change request that is sent for approval to users of this profile, you must assign the **Remedyforce Change for Clients Version 1.0** page layout. After viewing the details of the change request, the user can approve or reject the change request.

n Click **Save**.

o For the Incident object in the Custom Object Layouts section, click the **View Assignment** link.

p Click **Edit Assignment**.

q Select the required profiles with the Chatter Only license.

r From the **Page Layout To Use** list, select **Remedyforce Incident for Clients Version 1.0**.

With this layout, users of this profile can log on by using the `https://login.salesforce.com` URL. Users can access the **Home** and **Self Service** tabs. If chatter is enabled in the Salesforce organization, they can access the **Chatter** tab too. Users can also follow an incident by clicking the **Follow** link for the incident record from the **Home** tab. If the user is assigned as an Approver in an approval process, the user can approve change requests and incidents from the **Home** tab. In the **Recent Items** component of the Sidebar, users can view new incidents. However, these users cannot edit these incidents.

s Click **Save**.

10 To configure the field-level security for the profile with the Chatter Only license, perform the following actions:

a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

b In the **Profile Name** column, click the name of the profile with the Chatter Only license.

c In the Field-Level Security section for the Change Request object, click the **View** link.

d Click **Edit**.

e Ensure that the **Visible** check box is selected for the following fields:

- Account
- Category
- Client Email
- Closed Date
- Configuration Item
- Contact Type
- Description
- Feedback
- First Name
- Impact
- Impact~
- Last Name
- Opened Date
- Resolution
- Status
- Status~
- Service
- Service Offering
- Urgency
- Urgency~

f Click **Save**.

g Click **Back to Profile**.

h Repeat step c through step g for the following objects:

- Change Assessment

- Change History
- Incident
- Incident History

11 To enable Apex classes for the profile with the Chatter Only license, perform the following actions:

a In the Enabled Apex Class Access section, click **Edit**.

b In the **Available Apex Classes** list, select the following Apex classes:

BMCServiceDesk.ACOpRuleJobProcessor	BMCServiceDesk.EmailConversationListener
BMCServiceDesk.BMCESApexClass	BMCServiceDesk.EmailCreateIncident
BMCServiceDesk.BatchBMCCommonCIUpdateLinkTask	BMCServiceDesk.EmailIncidentStatus
BMCServiceDesk.BatchCIClientLinkUpdate	BMCServiceDesk.EmailListener
BMCServiceDesk.BatchCMDBReportGenerator	BMCServiceDesk.GenerateUsageMetrics
BMCServiceDesk.BatchCategorySystemflagUpdate	BMCServiceDesk.GenericEmailListener
BMCServiceDesk.BatchCategoryTreeUpdate	BMCServiceDesk.JSRemoteActions
BMCServiceDesk.BatchIncidentDetailsUpdate	BMCServiceDesk.MilestoneEngineScheduler
BMCServiceDesk.BatchServiceInstanceUpdate	BMCServiceDesk.MobileAPI
BMCServiceDesk.BatchTaskDetailsUpdate	BMCServiceDesk.MobileConfiguration
BMCServiceDesk.CMDBClassAccess	BMCServiceDesk.MobileFAQBean
BMCServiceDesk.CMDBGenericRemoting	BMCServiceDesk.MobileIncident
BMCServiceDesk.CMDBReportExporter	BMCServiceDesk.MobileResult
BMCServiceDesk.CategoryCustomIterable	BMCServiceDesk.PopulateRoleHierarchy
BMCServiceDesk.CategoryIterable	BMCServiceDesk.RecordsListCon
BMCServiceDesk.ChangeRequestEmailListener	BMCServiceDesk.SFDCEncoder
BMCServiceDesk.ClientImportsDeleteBatchJob	BMCServiceDesk.SLTBusinessHourOverride
BMCServiceDesk.ClientInfo	BMCServiceDesk.SSDriverAccess
BMCServiceDesk.CloseIncidentEmailListener	BMCServiceDesk.SSSFSearchResultBean
BMCServiceDesk.ComposeEmailController	BMCServiceDesk.SiteLoginController
BMCServiceDesk.CreateIncident	BMCServiceDesk.UpdateAccountBranding
BMCServiceDesk.DBManager	BMCServiceDesk.WebServiceMethodsUtility
BMCServiceDesk.DriverAccess	

c To move the selected Visualforce pages from the **Available Apex Classes** list to the **Enabled Apex Classes** list, click the right arrow.

d Click **Save**.

12 To enable Visualforce pages for the profile with the Chatter Only license, perform the following actions:

a In the Enabled Visualforce Page Access section, click **Edit**.

b To make the Visualforce pages accessible in addition to the list of pages already enabled, in the **Available Visualforce Pages** list, select the following Visualforce pages:

- **BMCServiceDesk.FeedbackSurveyPage**
- **BMCServiceDesk.StdSelfServiceHome**

c To move the selected Visualforce pages from the **Available Visualforce Pages** list to the **Enabled Visualforce Pages** list, click the right arrow.

The **Enabled Visualforce Pages** list must contain the following Visualforce pages after you perform step c:

BMCServiceDesk.FeedbackSurveyPage	BMCServiceDesk.SSForgotLoginInfo
BMCServiceDesk.FileDownloadPage	BMCServiceDesk.SSIncident
BMCServiceDesk.KM_ArticleView	BMCServiceDesk.SSIncidentActionData
BMCServiceDesk.KM_PopularArticles	BMCServiceDesk.SSIncidentCustom
BMCServiceDesk.KM_PreviewArticle	BMCServiceDesk.SSIncidentStatus
BMCServiceDesk.SDEHome	BMCServiceDesk.SSMyCartWidgetPage
BMCServiceDesk.SearchPage	BMCServiceDesk.SSMyHelpRequests
BMCServiceDesk.SelfServiceCommonQA	BMCServiceDesk.SSMyProfile
BMCServiceDesk.SelfServiceHome	BMCServiceDesk.SSQuickLinksPopup
BMCServiceDesk.SelfServicePopularReque st	BMCServiceDesk.SSQuickLinksWidget
BMCServiceDesk.SelfServiceSettingsCollec tion	BMCServiceDesk.SSRedirect
BMCServiceDesk.SSAttachmentUploadCo mplete	BMCServiceDesk.SSSearchPage
BMCServiceDesk.SSBroadcastWidgetPage	BMCServiceDesk.SSSearchPortletPage
BMCServiceDesk.SSCategoryGroupingPag e	BMCServiceDesk.SSSiteLogin
BMCServiceDesk.SSCategorySearchPage	BMCServiceDesk.SSSiteRegister
BMCServiceDesk.SSChangePassword	BMCServiceDesk.SSTickerPage
BMCServiceDesk.SSContactUs	BMCServiceDesk.SSUserTemplate
BMCServiceDesk.SSDocumentationPage	BMCServiceDesk.StdSelfServiceHome
BMCServiceDesk.SSFetchMobileConfig	

d Click **Save**.

13 Repeat step 2 through step 12 for all profiles with the Chatter Only license.

Assigning permission sets

Profiles contain basic accesses and permissions for a group of users. Permission sets can be used in addition to profiles to provide additional levels of accesses and permissions to a user or multiple users. For more information about permission sets, see `http://ap1.salesforce.com/help/doc/en/perm_sets_overview.htm`.

While installing BMC Remedyforce, if you did not map the profiles of BMC Remedyforce with the profiles of your Salesforce organization, you can use permission sets to provide the required access and permissions to a user based on the required profile.

Before assigning permission sets, ensure that you have done the following:

- Manually configure the visibility of BMC Remedyforce application and required tabs to a profile. For more information, see “Configuring visibility of BMC Remedyforce and tabs for profiles” on page 22.
- Assign page layouts to the required profiles. For more information, see Assigning version 3.0 page layouts to objects (page 86).
- *(Optional)* If you are using the **Account Site** field on the **Remedyforce Workspaces** > **Accounts** form, you must configure its visibility to the required profiles. For more information, see “Making the Account Site field visible” on page 23.

By default, the following permission sets are provided:

- ServiceDesk Staff
- ServiceDesk Client
- ServiceDesk Change Manager
- ServiceDesk Release Coordinator

You can assign these permission sets to the required users.

▶ To assign a permission set to a user

1. Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Users**.
2. Click the user to whom you want to assign a permission set.
3. In the **Permission Set Assignment** section, click **Edit Assignment**.

   The permission sets available for the license of the selected user are displayed in the **Available Permission Sets** list.
4. Select the required permission sets in the **Available Permission Sets** list, and click the right arrow to move the selected permission sets to the **Enables Permission Sets** list.
5. Click **Save**.

   After assigning permission set to a profile, assign the required

Configuring visibility of BMC Remedyforce and tabs for profiles

If you have not mapped the profiles of BMC Remedyforce with the profiles of your Salesforce organization, you can use permission sets to provide the required access and permissions to a user based on the required profile. In addition, you must manually configure the visibility of BMC Remedyforce application and required tabs to a profile.

▶ To configure visibility of BMC Remedyforce and tabs for a profile

1. Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.
2. In the **Action** column of the required profile, click **Edit**.
3. In the **Custom App Settings** section, select the **Visible** check box for **BMC Remedyforce**.
4. In the **Tab Settings** section, select **Default On** for the required tabs.
5. Click **Save**.

The following table provides you the list tabs that should be visible to the profiles of BMC Remedyforce.

Tabs	Profiles			
	ServiceDesk Staff	ServiceDesk Client	ServiceDesk Change Manager	ServiceDesk Release Coordinator
Dashboards	+		+	
Incidents	+		+	
Tasks	+		+	
Problems	+		+	
Change Requests			+	
Knowledge Articles	+		+	
Reports	+		+	
Remedyforce Workspaces	+		+	
Remedyforce CMDB	+		+	
Chatter	+	+	+	+
Broadcasts	+		+	
Remedyforce Dashboard	+		+	
Releases			+	+
Remedyforce Self Service		+		
Alignability	+		+	+

Making the Account Site field visible

If you are assigning permission sets to profiles and you are using the **Account Site** field on the **Remedyforce Workspaces > Accounts** form, you must configure its visibility to the required profiles.

To make the Account Site field visible

1. Navigate to **Setup > App Setup > Customize > Accounts > Fields**.
2. In the **Account Fields** page, click **Account Site**.
3. Click **View Field Accessibility**.
4. For the profiles that should have access to the **Account Site** field, click **Hidden** in the **Field Access** column.
5. In the **Field-Level Security** section, select the **Visible** check box.

   For more information, see `https://na14.salesforce.com/help/doc/en/checking_field_accessibility_for_a_particular_field.htm`.
6. Click **Save**.

Enabling feed tracking for Salesforce Chatter

After you have installed the managed package, you must enable feed tracking for custom objects and the fields of custom objects. You can enable feed tracking for 20 fields of each object. The updates of the enabled fields appear in the Chatter Feed.

For more information about Salesforce Chatter, see `https://na7.salesforce.com/help/doc/user_ed.jsp?loc=help&section=help&hash=topic-title&target=collab_overview.htm`. For more information about enabling feed tracking, see `https://na7.salesforce.com/help/doc/user_ed.jsp?section=help&target=collab_overview.htm&loc=help&hash=topic-title`.

Enable feed tracking for the following custom objects and the fields of custom objects:

- Broadcast
- Incident
- FAQ
- Change Request
- Base Element—Enable feed tracking for this object to view posts, comments, and field updates that are made to a configuration item.

NOTE

If you have added custom fields to existing objects or to custom objects, you must enable feed tracking to track changes to these fields in the chatter stream.

Setting up the required queues

You must create the Incident Queue and Task Queue to be able to assign incidents and tasks to these queues.

▶ To set up the required queues

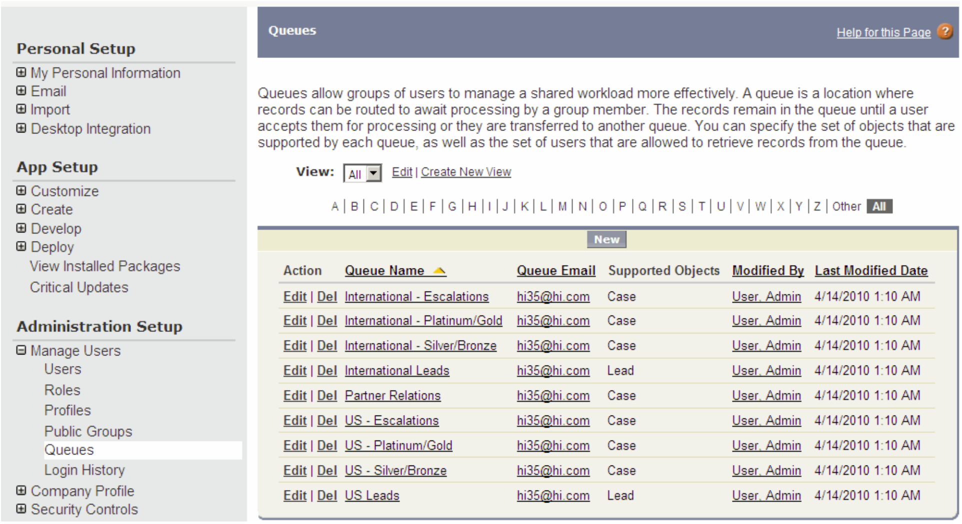
1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 To create the Incident Queue, perform the following actions:

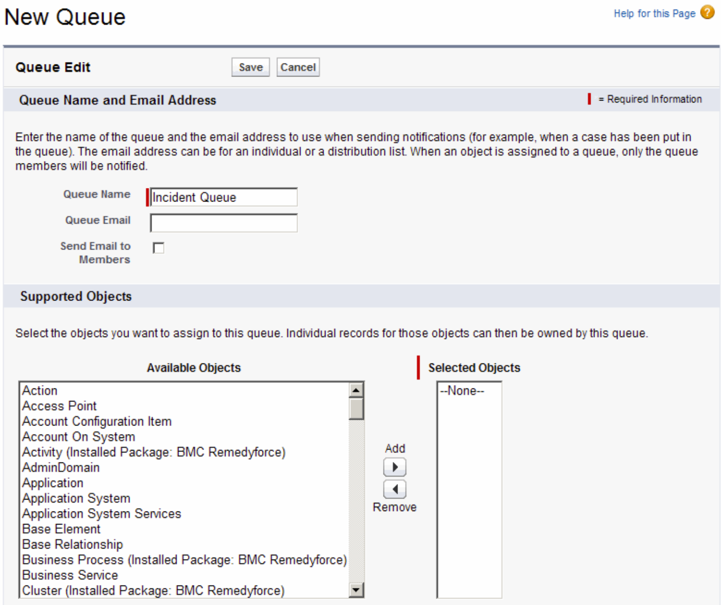
a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Queues**.

A list of all queues in your Salesforce.com organization is displayed.



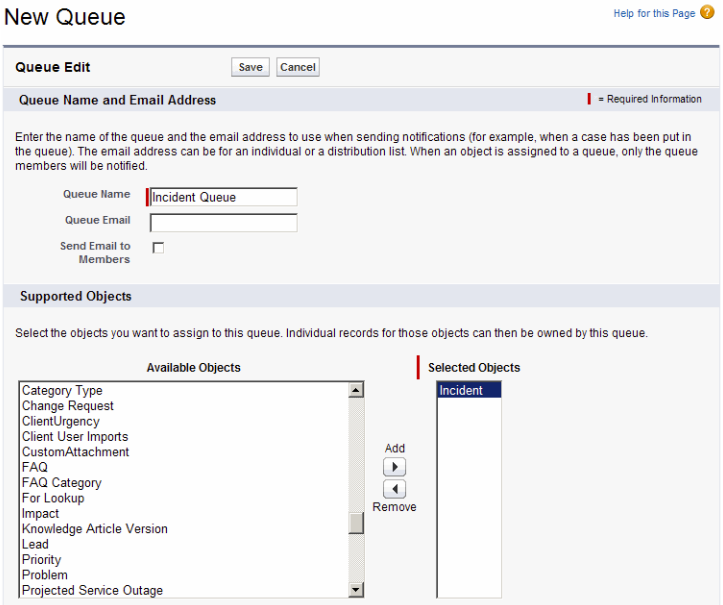
b Click **New**.

c In the **Queue Name** field, type `Incident Queue`.



d In the **Available Objects** list of the Supported Objects section, select the **Incident** object.

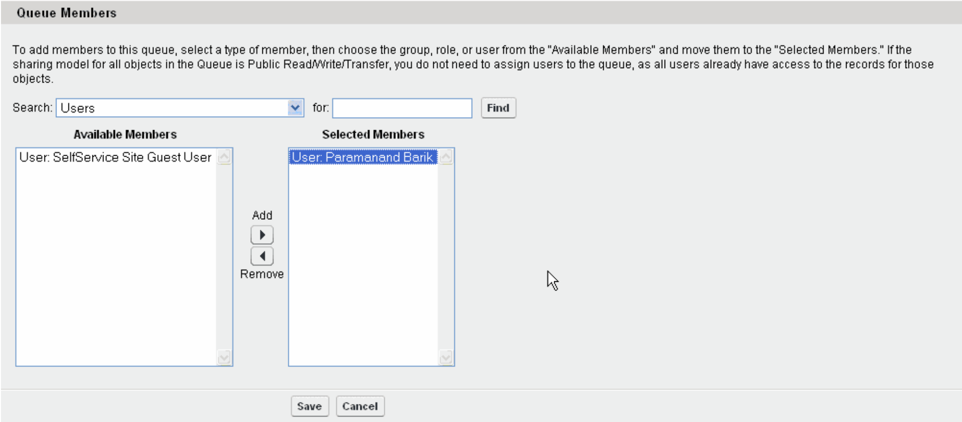
e To move the Incident object from the **Available Objects** list to the **Selected Objects** list, click the right arrow.



f In the Queue Members section, from the **Search** list, select **Users**.

g In the **Available Members** list, select the staff members who must be part of this queue.

h To move the selected staff members from the **Available Members** list to the **Selected Members** list, click the right arrow.



i Click **Save**.

3 To create the Task Queue, perform the following actions:

a Navigate to **Setup > Administration Setup > Manage Users > Queues**.

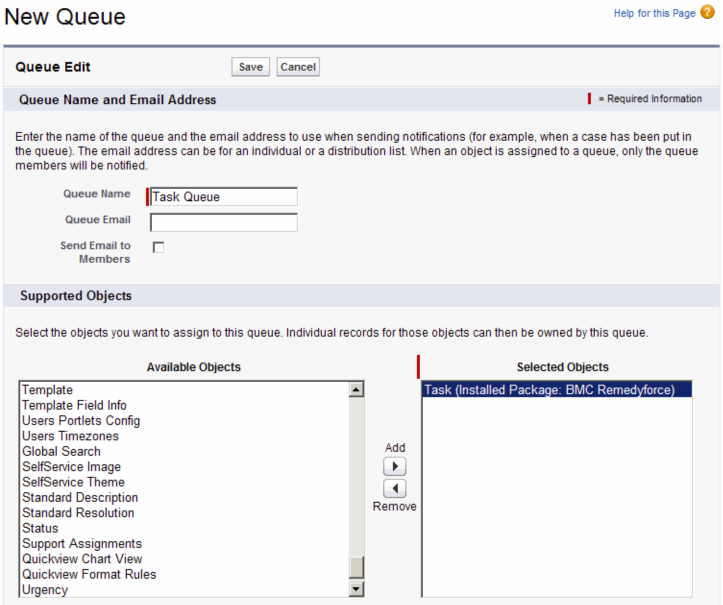
A list of all queues in your Salesforce.com organization is displayed.

b Click **New**.

c In the **Queue Name** field, type `Task Queue`.

d In the **Available Objects** list of the Supported Objects section, select the **Task (Installed Package: BMC Remedyforce)** object.

e To move the **Task (Installed Package: BMC Remedyforce)** object from the **Available Objects** list to the **Selected Objects** list, click the right arrow.



f In the Queue Members section, from the **Search** list, select **Users**.

g In the **Available Members** list, select the staff members who must be part of this queue.

h To move the selected staff members from the **Available Members** list to the **Selected Members** list, click the right arrow.

i Click **Save**.

Setting up the default business hours and holidays of your organization

You must configure the default business hours, time zone associated with the business hours, and holidays of your organization for the system administrator to configure the Application Settings of BMC Remedyforce to calculate the due date by using these values.

To configure the business hours of your organization, navigate to **Setup > Company Profile > Business Hours**. For more information about configuring the default business hours and time zone for your organization, see `https://na7.salesforce.com/help/doc/user_ed.jsp?loc=help&target=customize_supporthours.htm&section=Customizing`.

To configure holidays for your organization, navigate to **Setup > Company Profile > Holiday**. For more information about configuring holidays for your organization, see `https://na7.salesforce.com/help/doc/user_ed.jsp?loc=help&target=customizesupport_holidays.htm&section=Customizing`.

Setting up Self Service

This section describes how to set up Self Service for BMC Remedyforce.

▶ To set up Self Service

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

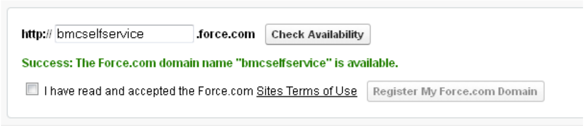
2 Navigate to **Setup > App Setup > Develop > Sites**.

3 In the Sites page, type the domain that you want to associate with Self Service.

4 Click **Check Availability**.

If the domain is available, the following message appears:

`Success: The Force.com domain name "`*`<domain>`*`-force.com" is available.`

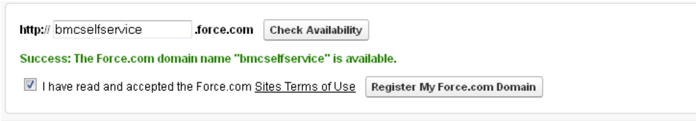


5 Select the **I have read and accepted the Force.com Sites Terms of Use** check box.

6 Click **Register My Force.com Domain**.

NOTE

You cannot modify the domain name after you complete the registration process.



7 In the confirmation dialog box, click **OK**.

8 In the Sites (<*domain name*>) section, click **New**.

9 In the New Sites section, enter the following information:

a In the **Site Label** field, type `SelfService`.

b In the **Site Name** field, type `SelfService`.

c In the **Site Description** field, type `BMC Remedyforce Self Service`.

By default, your name is populated in the **Site Contact** field.

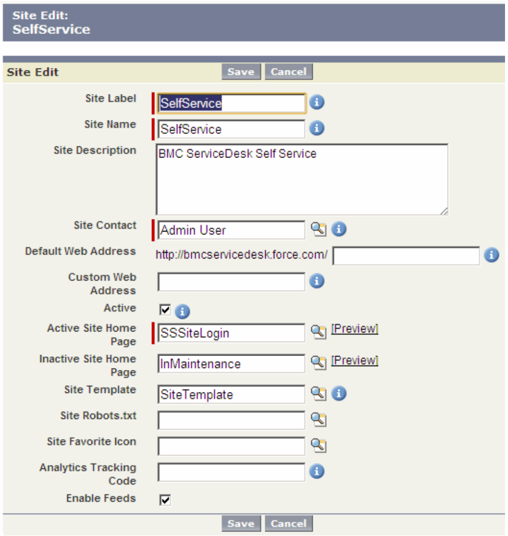
d Select the **Active** check box.

e In the **Active Site Home Page** and **Inactive Site Home Page** fields, ensure that `SSSiteLogin` and `InMaintenance` are entered.

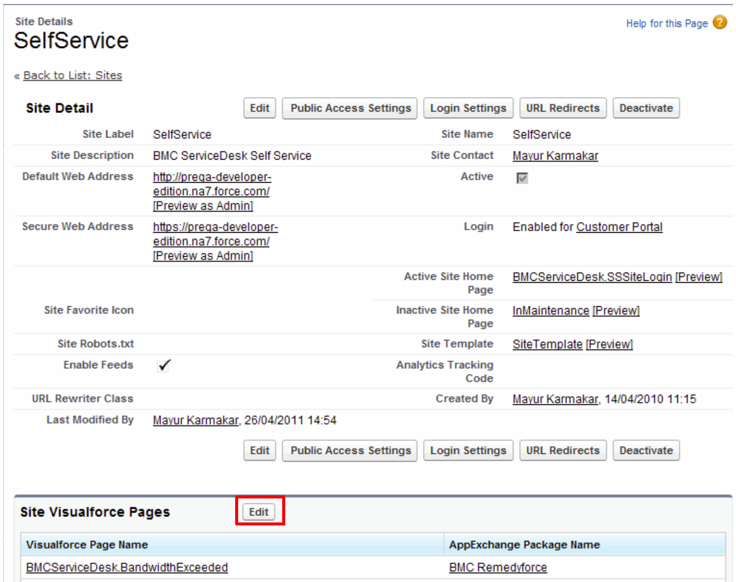
f In the **Site Template** field, type `SiteTemplate`.

g Select the **Enable Feeds** check box.

h Click **Save**.



10 In the Site Visualforce Pages section of the Site Details SelfService page, click **Edit**.



11 In the **Available Visualforce Pages** list, select the following Visualforce pages to make these Visualforce pages accessible in Self Service:

- BMCServiceDesk.FeedbackSurveyPage
- BMCServiceDesk.SSChangePassword
- BMCServiceDesk.SSFetchMobileConfig
- BMCServiceDesk.SSForgotLoginInfo
- BMCServiceDesk.SSMobileForgotPassword
- BMCServiceDesk.SSSiteLogin
- BMCServiceDesk.SSSiteRegister
- BMCServiceDesk.UnderConstruction

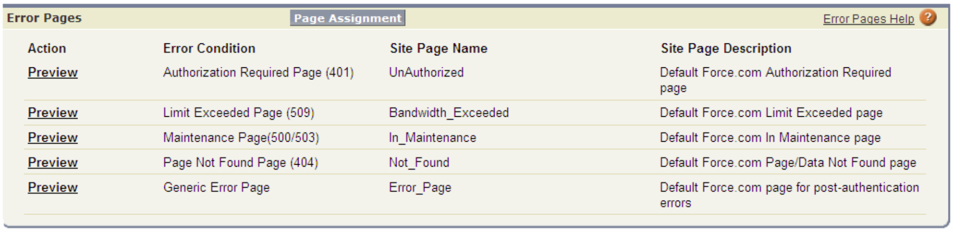
NOTE

Some of these Visualforce pages might be present in the **Enabled Visualforce Pages** list.

12 To move the selected Visualforce pages from the **Available Visualforce Pages** list to the **Enabled Visualforce Pages** list, click the right arrow.

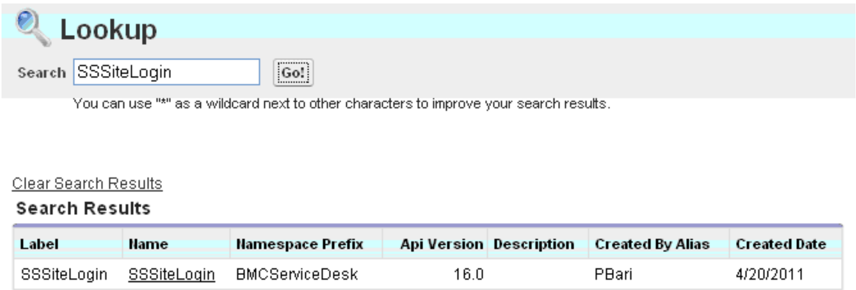
13 Click **Save**.

14 In the Error Pages section of the Site Details SelfService page, click **Page Assignment**.

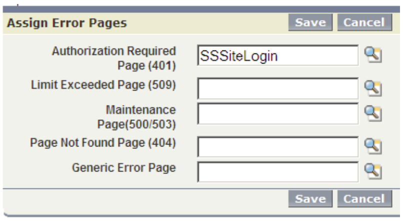


15 Click the **Authorization Required Page (401)** lookup.

16 In the Lookup window, type **SSSiteLogin**, and click **Go**.

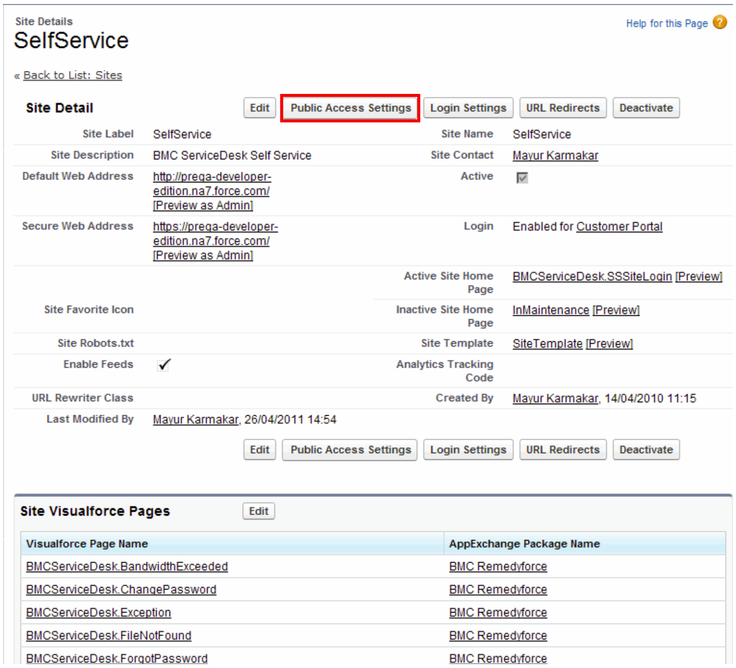


17 In the **Name** column, click **SSSiteLogin**.

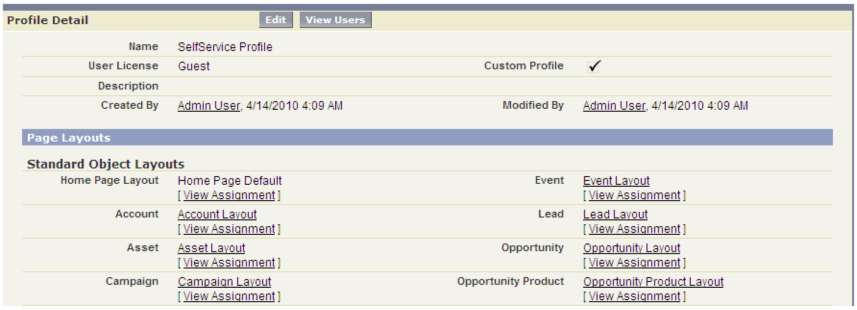


18 Click **Save**.

19 In the Site Detail section, click **Public Access Settings**.



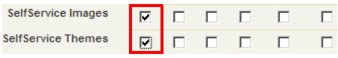
20 In the Profile Detail section, click **Edit**.



21 In the Custom Object Permissions section at the bottom of the Profile Edit: SelfService Profile page, select the **Read** check box for the following objects:

- SelfService Images

- SelfService Themes



22 Click **Save**.

23 In the Profile Detail section, click **View Users**.

The single account of Site Guest User Self Service appears.

24 Click the **Site Guest User Self Service** account.

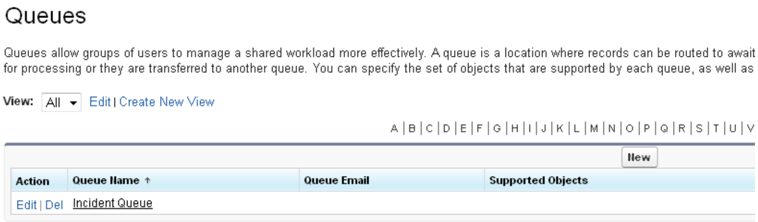
25 In the Managed Packages section, click **Assign Licenses**.

26 Select **BMC Remedyforce** and assign a license to this account.

When you assign a license, the Self Service Site becomes available for your Self Service clients to use.

27 Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Queues**.

28 Click **New**.



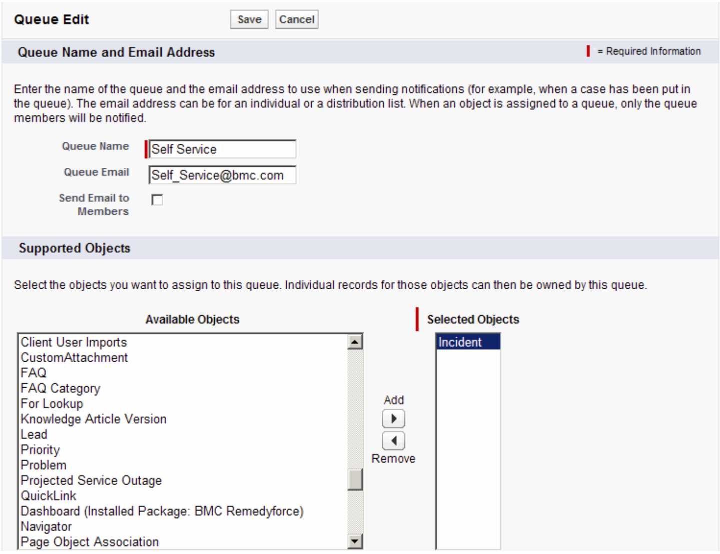
29 In the **Queue Name** field, type a name for the queue.

For example, type `SelfService`.

30 *(Optional)* In the **Queue Email** field, type an email address for the queue.

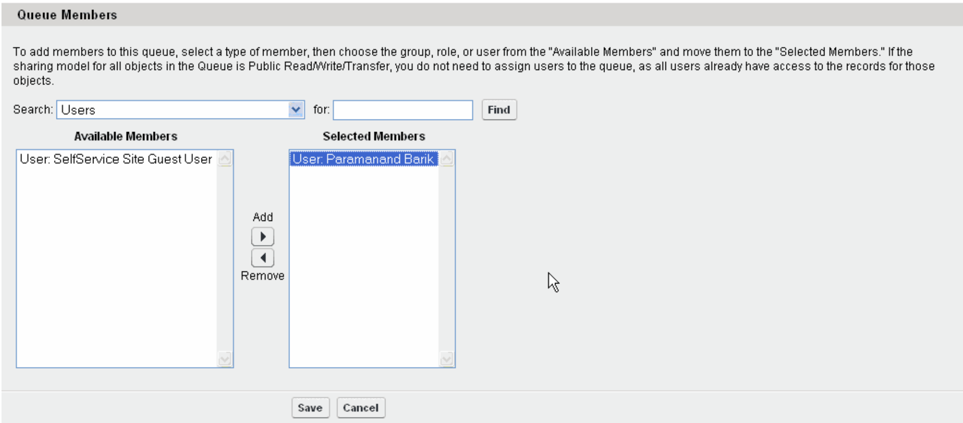
31 In the **Available Objects** list of the Supported Objects section, select the **Incident** object.

32 To move the Incident object from the **Available Objects** list to the **Selected Objects** list, click the right arrow.



33 *(Optional)* To assign staff members to this Queue, perform the following actions:

a From the **Search** list in the Queue Members section, select **Users**.

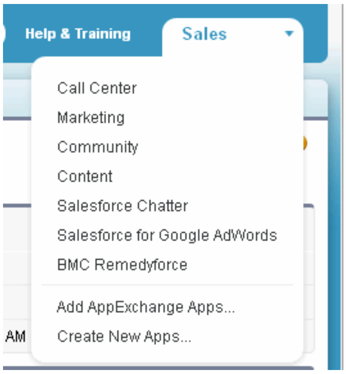


b In the **Available Members** list, select the staff members who must be part of this queue.

c To move the selected staff members from the **Available Members** list to the **Selected Members** list, click the right arrow.

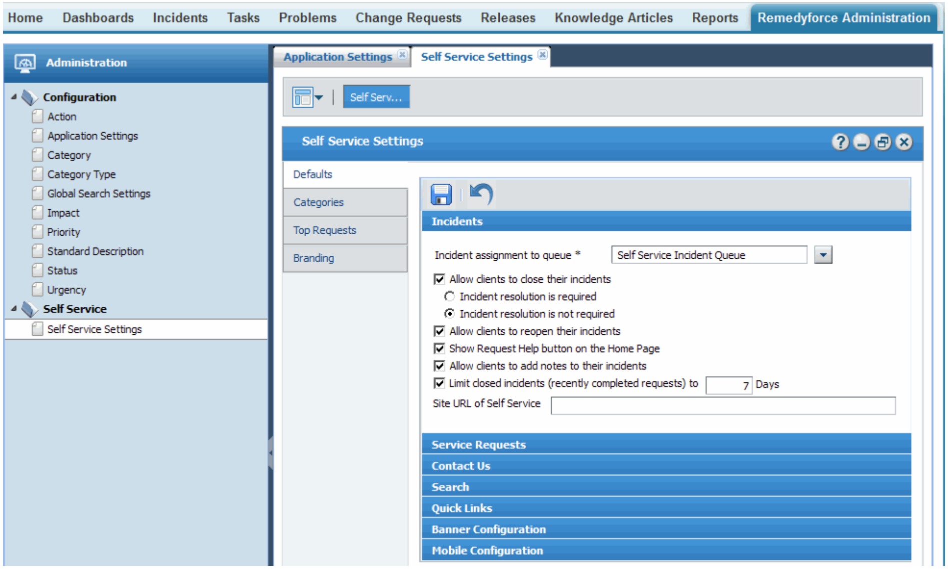
34 Click **Save**.

35 In the **Salesforce Applications** list, select **BMC Remedyforce**.



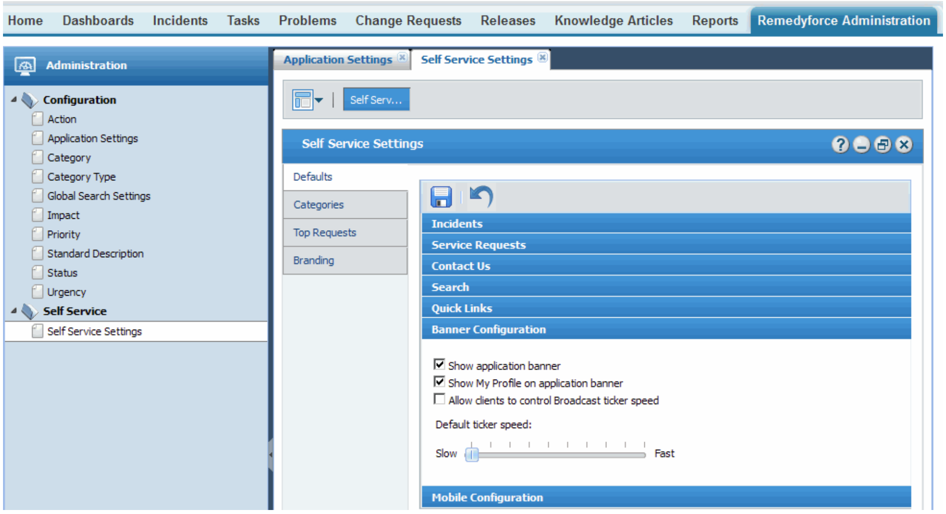
36 Click **Remedyforce Administration** tab and navigate to **Configuration > Self Service > Self Service Settings**.

37 In the Incidents section of the **Defaults** tab, click the **Incident Assignment to Queue** list.



38 In the Select from Queue window, select the queue that you have created.

39 To display the **My Profile** link in the banner of the browser, in the Profile Configuration section of the **Defaults** tab, select the **Show My Profile on Application Banner** check box.



40 Click **Save**.

You can now use your Customer Portal URL to access Self Service.

Setting up a Force.com Site for the BMC Login page

You can set up a Force.com Site and assign a Login page that allows users to log on to BMC Remedyforce directly. When users access BMC Remedyforce from this Login page, they are taken to the home page of BMC Remedyforce.

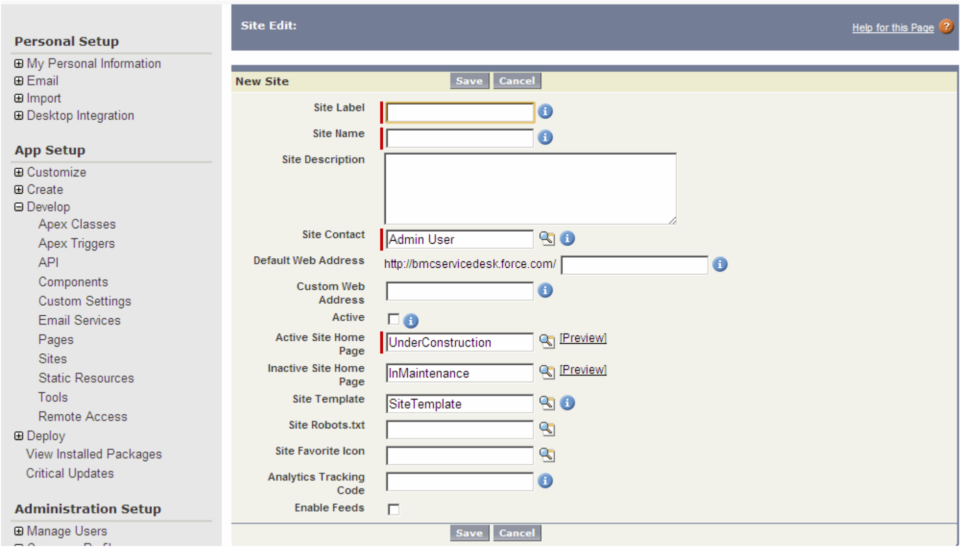
▶ To set up a Force.com Site

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **App Setup** > **Develop** > **Sites**.

3 Click **New**.

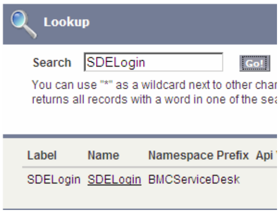


4 In **Site Label** field, type the label of your site.

5 In **Site Name** field, type the name of your site.

6 Click the **Active Site Home Page** lookup.

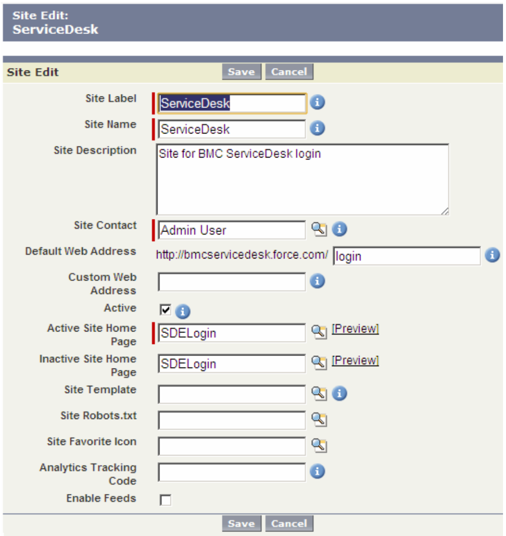
7 In the Lookup window, click the **SDELogin** page with the Namespace Prefix as **BMCServiceDesk**.



8 Click the **Inactive Site Home Page** lookup.

9 In the Lookup window, click the **SDELogin** page with the Namespace Prefix as **BMCServiceDesk**.

10 To make the site publicly available, select the **Active** check box.



11 To launch the Site Details page, click **Save**.

The Site Details section of the Site Details page displays the URL for the site you have created. This site can be used to launch the Login page. When users log on to this site, they are taken to the home page of BMC Remedyforce. When the user logs out or the session times out, this Login page is displayed.

Creating email services

If you want your users to create incidents and retrieve the status of incidents through email, you must create an email service and add the `EmailListener` out-of-the-box Apex class to the email service. Additionally, you can create another email service that allows staff members to interact with customers through email. For more information, see “Configuring email conversation” on page 40.

The `EmailListener` Apex class allows users to create incidents and retrieve the status of incidents through email. For more information about the type of BMC Remedyforce Apex classes available, see the BMC Remedyforce Online Help.

After adding this Apex class, you must configure an email address for the email service. This Apex class processes the email that is sent to the email address you have configured.

▶ To create an email service to create incidents or retrieve the status of incidents

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

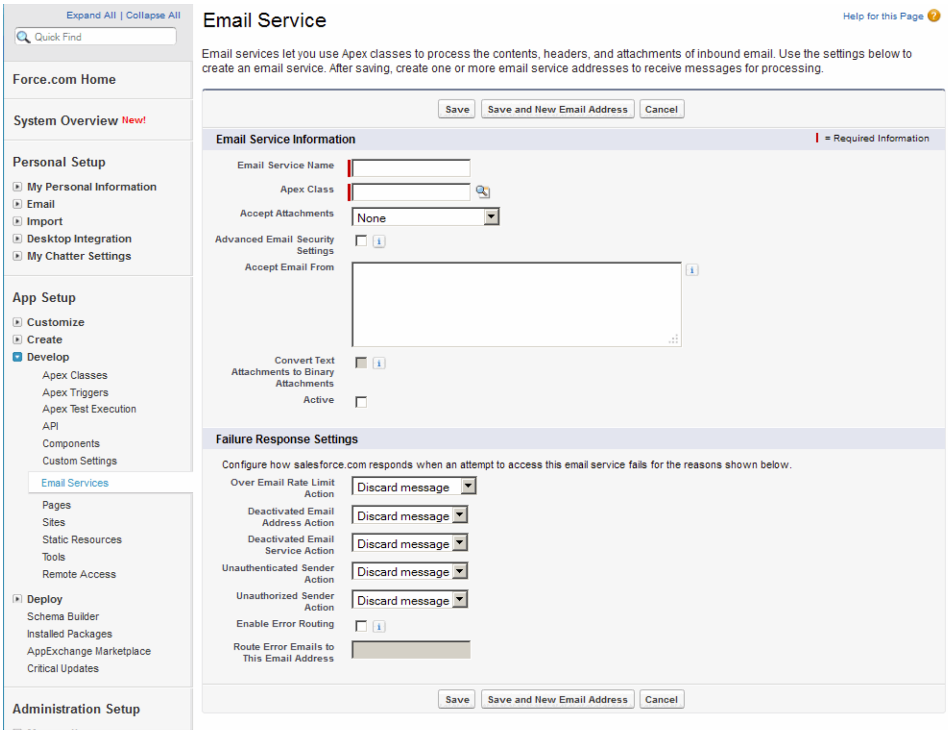
2 Navigate to **Setup** > **App Setup** > **Develop** > **Email Services**.

3 Click **New Email Service**.

4 In the **Email Service Name** field, type the name of your email service.

NOTE

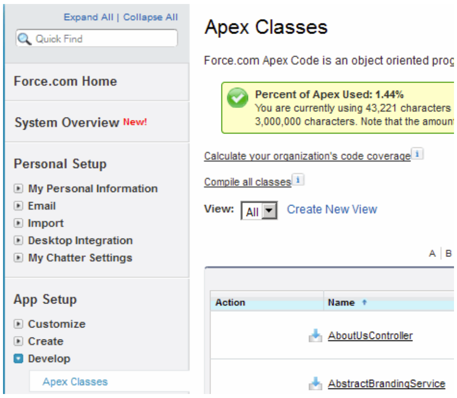
BMC recommends that you add `BMCRF` at the beginning of the name of the email service to allow you to differentiate BMC Remedyforce email services from the other email services that you create.



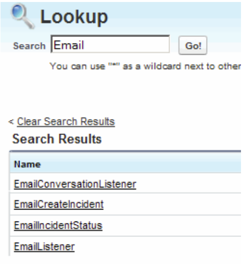
5 Click the **Apex Class** lookup.

6 In the **Search** field, type **Email** and click **Go**.

The list of Apex classes that begin with **Email** in the **Name** field is displayed. If the search results do not display any Apex classes with **Email** in the **Name** field, you must compile all Apex classes by navigating to **Setup > App Setup > Develop > Apex Classes** and clicking the **Compile all classes** link.



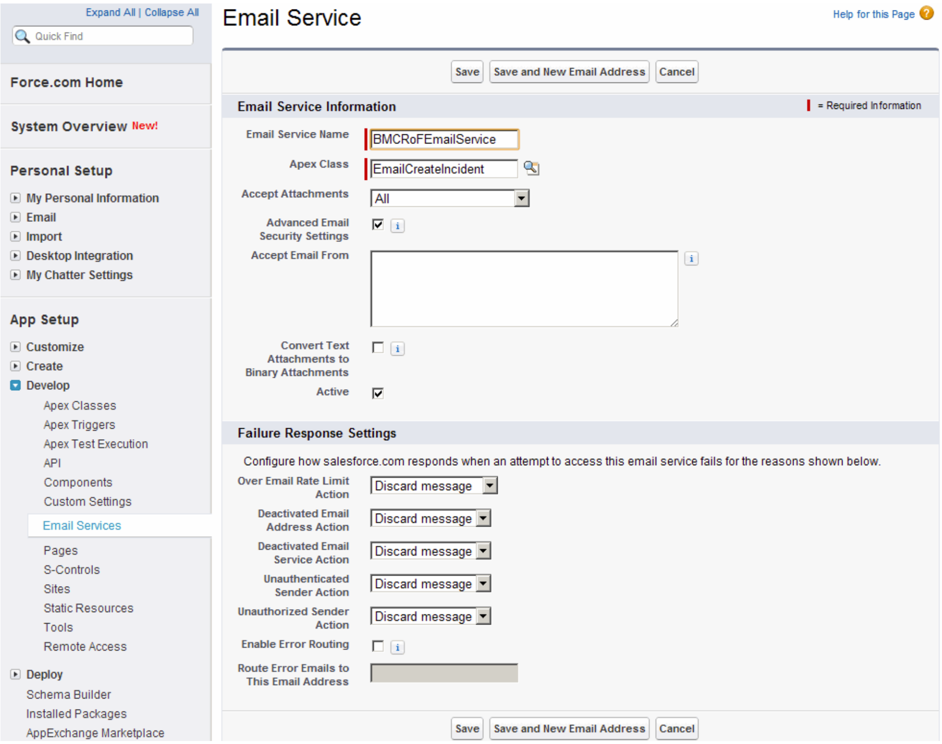
7 In the Lookup window, click the required Apex class.



8 From the **Accept Attachments** list, select **All**.

9 To ensure that attachments are not lost or deleted from the email, select the **Convert Text Attachments to Binary Attachments** check box.

10 To enable the email service, select the **Active** check box.



11 Depending on the requirements of your organization, configure the remaining fields.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=code_email_services_editing.htm&loc=help&hash=topic-title`.

12 Click **Save**.

NOTE

You must configure an email address for this email service. The Apex class in the email service processes the email that is sent to the email address you have configured. For more information about configuring an email address, see the BMC Remedyforce Online Help.

Configuring email conversation

If you want your staff members to interact with the clients of their incidents, you must configure email conversation on BMC Remedyforce. The following steps provide an overview of how to configure email conversation:

Step 1 Create an email service.

Step 2 Add the `EmailConversationListener` out-of-the-box Apex class to the email service.

Step 3 Create an email address for the email service.

Step 4 Create an outbound email address for your organization.

Step 5 Configure your Email server to route the all emails from the outbound email address of your organization to the email address created for the email service.

Step 6 Configure the **From email address** list in Application Settings to use the outbound email address.

▶ To configure email conversation

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2. Navigate to **Setup** > **App Setup** > **Develop** > **Email Services**.
3. Click **New Email Service**.
4. In the **Email Service Name** field, type the name of your email service.

   For example, type `BMCSDOF_EmailConversationService` as the name of the email service.

   NOTE

   BMC recommends that you add `BMCSDOF` at the beginning of the name of the email service to allow you to differentiate BMC Remedyforce email services from the others email services that you create.

5. Click the **Apex Class** lookup.
6. In the Lookup window, click the `EmailConversationListener` Apex class.

7 From the **Accept Attachments** list, select **All**.

8 To ensure that attachments are not lost or deleted from the email, select the **Convert Text Attachments to Binary Attachments** check box.

9 To enable the email service, select the **Active** check box.

10 Depending on the requirements of your organization, configure the remaining fields.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=code_email_services_editing.htm&loc=help&hash=topic-title`.

11 To save the email service and configure an email address for this email service, click the **Save and New Email Address** button.

12 In the Email Address Information section of the Email Service Address page, in the **Email address** field, type the user name of the email address.

Salesforce.com creates and assigns a unique domain name to the email address.

For example, type **servicedesk** as the user name of the email address. Salesforce.com generates a unique domain for this email address, such as `servicedesk@w-16m7yz3cj78e5esxxntd47ttf.in.salesforce.com`.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=code_email_services_editing.htm&loc=help&hash=topic-title`.

13 To activate the email address, select the **Active** check box.

14 Click the **Context User** lookup.

15 In the Lookup window, click the required user.

16 *(Optional)* In the **Accept Email From** field, type the valid email addresses.

The email service address accepts emails from these email addresses only.

17 Click **Save**.

18 To create an outbound email address for your organization, perform the following actions:

An organization-wide email address can be used for all outbound email from your organization. You can configure the Display Name of the email address to display your department name, such as `Service Desk [servicedesk@bmc.com]`. When a staff member sends an email to the client of an incident, the email is sent from this email address. Additionally, you can configure your notification workflows to use this email address to send notification emails to clients when their incidents are created or closed.

NOTE

Ensure that you provide a Display Name because the Display Name appears as the name of the email sender when any email is sent to a client by a staff member.

For more information, see “Configuring an outbound email address” on page 43 and https://na7.salesforce.com/help/doc/user_ed.jsp?loc=help&target=orgwide_email.htm&section=Email_Admin.

a Navigate to **Setup** > **Administration Setup** > **Email Administration** > **Organization-Wide Addresses**.

b Click **Add**.

c In the **Display Name** field, type the display name of your organization-wide email address.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=orgwide_emailedit.htm&loc=help&hash=topic-title.

NOTE

`no-reply@salesforce.com; on behalf of:` is added before the display name. You can disable this addition. For more information, see step 19.

d In the **Email Address** field, type the organization-wide email address that you want to use for all outbound email.

e To use this email address for all outbound email from staff members, select the **Allow All Profiles to Use this From Address** option.

f Click **Save**.

Salesforce.com sends a verification email to the email address you have specified in the **Email Address** field.

g To use this email address for outbound emails and to confirm the validity of the organization-wide email address, in the verification email, click the confirmation link.

If the verification is not performed, staff members cannot use this email address to send emails to clients.

19 To remove the `no-reply@salesforce.com; on behalf of:` that is added before the display name, perform the following actions:

a Navigate to **Setup** > **Administration Setup** > **Email Administration** > **Deliverability**.

b In the Email Security Compliance section, clear the **Enable Sender ID compliance** check box.

c Click **Save**.

20 To use the outbound email address of your organization, in BMC Remedyforce, in the Email Conversation section of the **General** tab of Application Settings, configure the **From email address** list.

For example, select `servicedesk@bmc.com` from the **From email address** list.

For more information about configuring Application Settings, see the BMC Remedyforce Online Help.

21 To route all emails from the outbound email address of your organization to the email address created for the email service, configure your email server.

When a staff member sends an email to the client, the email is sent from the servicedesk@bmc.com email address. When the client replies to the email, the reply goes to the mailbox represented by servicedesk@bmc.com. To associate the reply email to the incident of the client, you must configure the reply to the email to be forwarded to the email address that is configured for your email service. For example, you must configure the reply to the email to be forwarded to the servicedesk@w-16m7yz3cj78e5esxxntd47ttf.in.salesforce.com that is configured for the BMCSDOF_EmailConversationService email service in step 12. When the email service receives the reply, it associates the email to the appropriate incident.

NOTE

Work with your Email Administration group to set up a rule to forward all emails that come to your outbound email address (servicedesk@bmc.com). These emails must be forwarded to the email address (servicedesk@w-16m7yz3cj78e5esxxntd47ttf.in.salesforce.com) of your email service.

For more information about configuring your Email server, see the documentation of your Email server.

Configuring an outbound email address

An organization-wide email address can be used for all outbound emails from your organization. You can configure the Display Name of the email address to display your department name, such as Service Desk [servicedesk@bmc.com]. When a staff member sends an email to the client of an incident, the email is sent from this email address. Additionally, you can configure your notification workflows to use this email address to send notification emails to clients when their incidents are created or closed.

For more information, see https://na7.salesforce.com/help/doc/user_ed.jsp?loc=help&target=orgwide_email.htm&section=Email_Admin.

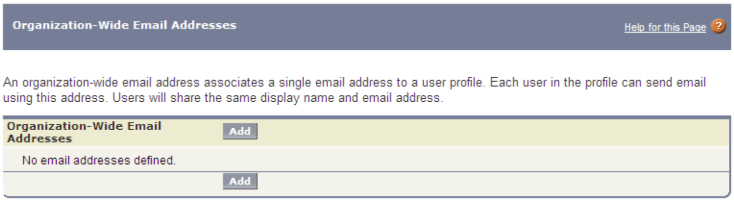
▶ To configure an outbound email address

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2 Navigate to **Setup** > **Administration Setup** > **Email Administration** > **Organization-Wide Addresses**.

3 Click **Add**.



4 In the **Display Name** field, type the display name of your organization-wide email address.

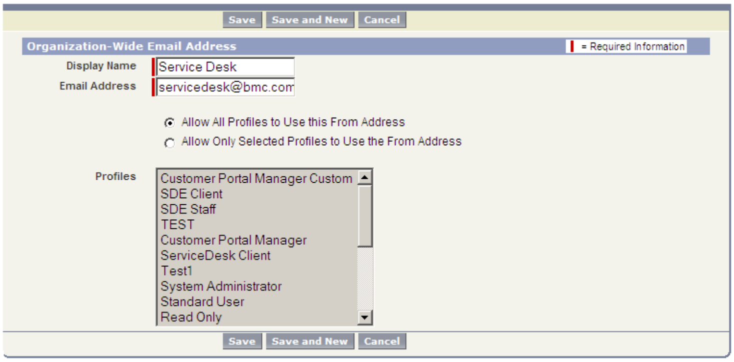
For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=orgwide_emailedit.htm&loc=help&hash=topic-title`.

NOTE

`no-reply@salesforce.com; on behalf of:` is added before the display name. You can disable this addition. For more information, see step 10.

5 In the **Email Address** field, type the organization-wide email address that you want to use for all outbound email.

6 To use this email address for all outbound email from staff members, select the **Allow All Profiles to Use this From Address** option.



7 Click **Save**.

Salesforce.com sends a verification email to the email address you have specified in the **Email Address** field.

8 To confirm the validity of the organization-wide email address, in the verification email, click the confirmation link.

9 To configure your notification workflows to use this email address for all email alerts, perform the following actions:

a Navigate to **App Setup > Create > Workflow & Approvals > Email Alerts**.

b In the **Action** column, for the notification workflow that you want to configure, click **Edit**.

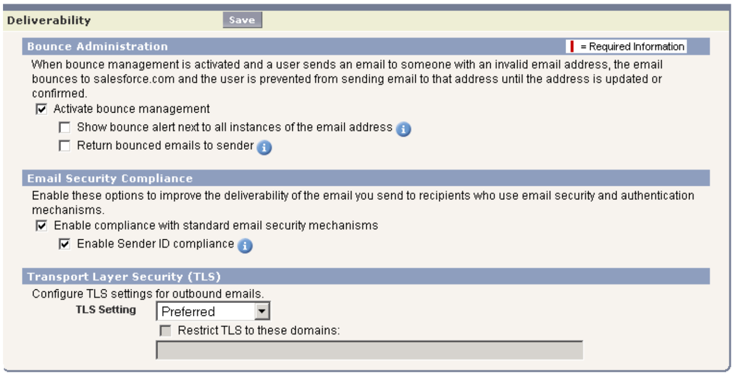
c From the **From Email Address** list, select your organization-wide email address.

Your organization-wide email address appears in the **From Email Address** list only if you have verified that the organization-wide email address is a valid email address. If your organization-wide email address does not appear in this list, navigate to **Setup > Administration Setup > Email Administration > Organization-Wide Addresses**, click the **Resend** link in the **Status** column, and verify the email address.

d Click **Save**.

10 To remove the `no-reply@salesforce.com; on behalf of:` that is added before the display name, perform the following actions:

a Navigate to **Setup** > **Administration Setup** > **Email Administration** > **Deliverability**.



b In the Email Security Compliance section, clear the **Enable Sender ID compliance** check box.

c Click **Save**.

Configuring workflows

BMC Remedyforce has created the following out-of-the-box workflows for you to use:

- Notify staff of incident due in 1 hour
- Notify staff of incident nearing due date
- Notify staff when no action has occurred for 24 hours
- Notify the assigned staff member when a task is created and assigned to the staff member
- Notify the assigned staff member when a task is reopened
- Notify the assigned staff member when an incident has been marked for follow up
- Notify the assigned staff member when an incident is created and assigned to the staff member
- Notify the assigned staff member when an incident is reassigned to the staff member
- Notify the assigned staff member when an incident is reopened
- Notify the client when a task is closed
- Notify the client when a task is created
- Notify the client when a task is reopened

- Notify the client when an incident is closed
- Notify the client when an incident is created
- Notify the client when an incident is reopened
- Request status update of an Incident via email
- Open Incident from email
- Notify Author that the Article is due for review
- Notify user that knowledge article is published
- Notify change request owner when final task linked to change request is closed
- Notify incident owner when change request linked to incident is closed
- Notify incident owner when final task linked to incident is closed
- Notify problem owner when change request linked to problem is closed
- Notify the owner on new release creation
- Notify the owner on release status change
- Notify the Owner when a Release is marked as Failed
- Apply template to BMC Server Automation created incident
- Apply template to End User Experience Management created incident

You must activate these workflows if you want to use them. For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=customize_wfrules.htm&loc=help&hash=topic-title`.

Additionally, you have to create Time Triggers for the following workflows if you want to use these time-dependent workflows:

- Notify the assigned staff member when an incident is due in one hour
- Notify the assigned staff member when an incident is nearing its Due Date
- Notify the assigned staff member when no action has occurred for 24 hours
- Notify Author that the Article is due for review

NOTE

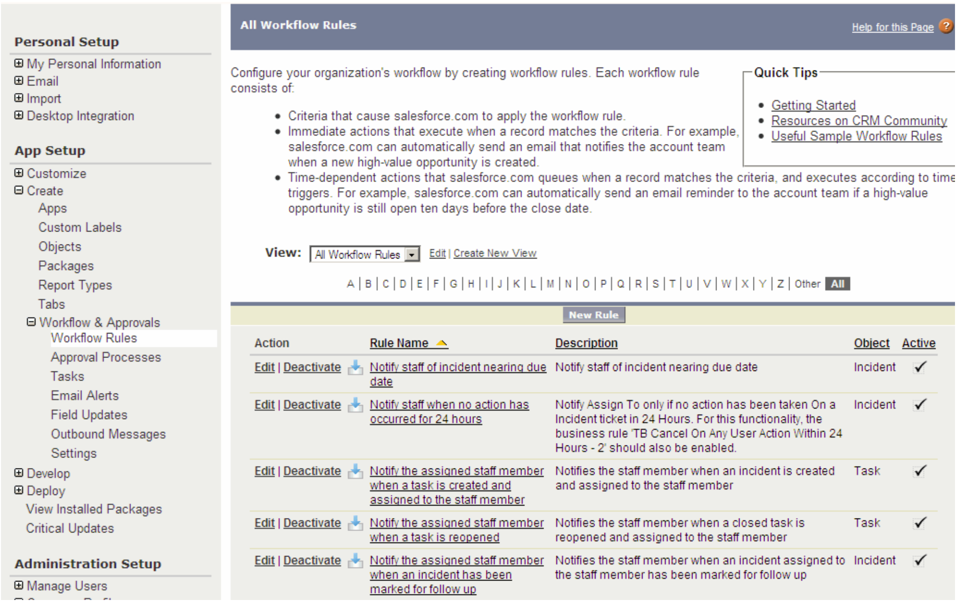
If you have multiple workflow rules that are scheduled to execute within a common time frame, such as one hour, Salesforce.com queues up the workflow actions of these workflow rules and triggers these workflow rules in batches. This results in the triggers of these workflow rules executing at the same time and the email alerts being sent at the same time. Due to the queuing up of workflow actions, you can expect a delay of around 10-20 minutes for a workflow rule to trigger.

▶ To create time triggers for out-of-the-box workflows

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **App Setup** > **Create** > **Workflow & Approvals** > **Workflow Rules**.

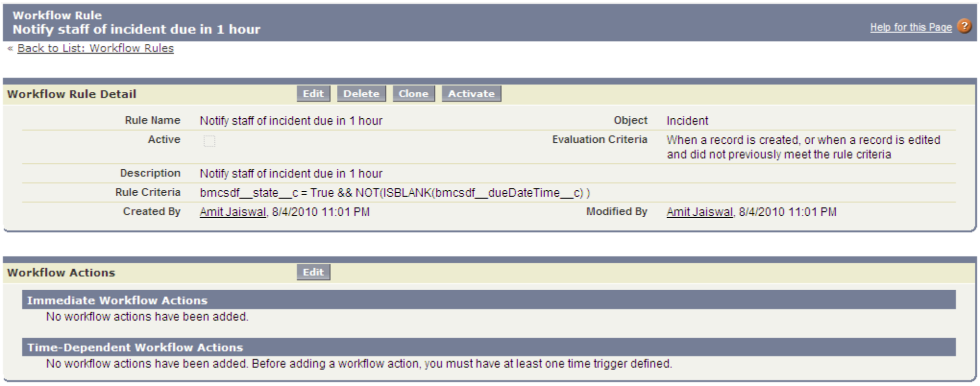


3 For the **Notify the assigned staff member when an incident is due in one hour** workflow, perform the following actions:

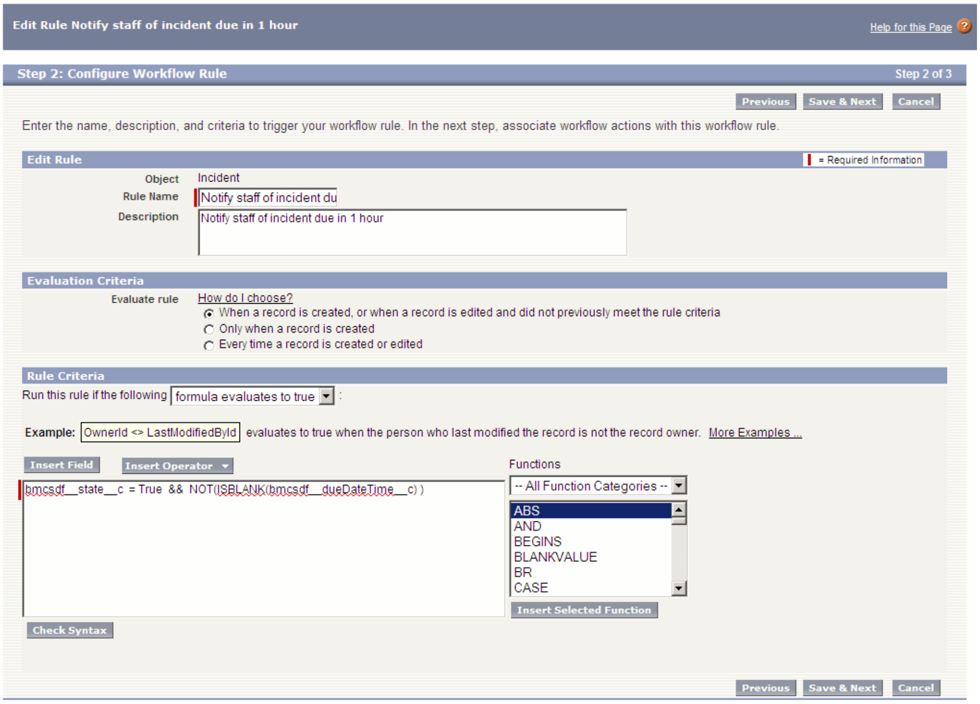
a In the All Workflow Rules page, in the **Rule Name** column, click the **Notify the assigned staff member when an incident is due in one hour** workflow.

b In the Workflow Actions section, click **Edit**.

c In the Workflow Rule Detail section, click **Clone**.

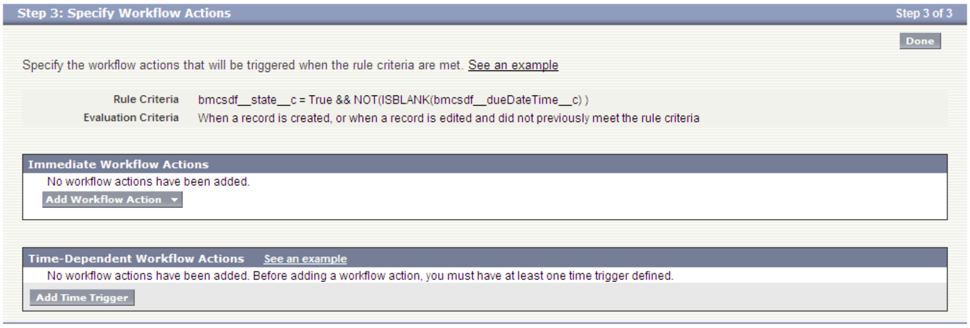


d In the Edit Rule section, in the **Rule Name** field, type a new name for the workflow rule.



e Click **Save & Next**.

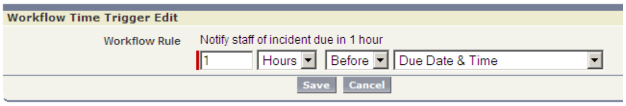
f In the Time-Dependent Workflow Actions section of the Edit Rule page, click **Add Time Trigger**.



g Enter the following values for the time trigger:

- `1`
- `Hours`
- `Before`
- `Due Date & Time`

These values indicate that the workflow executes one hour before the Due Date & Time of the incident.



h Click **Save**.

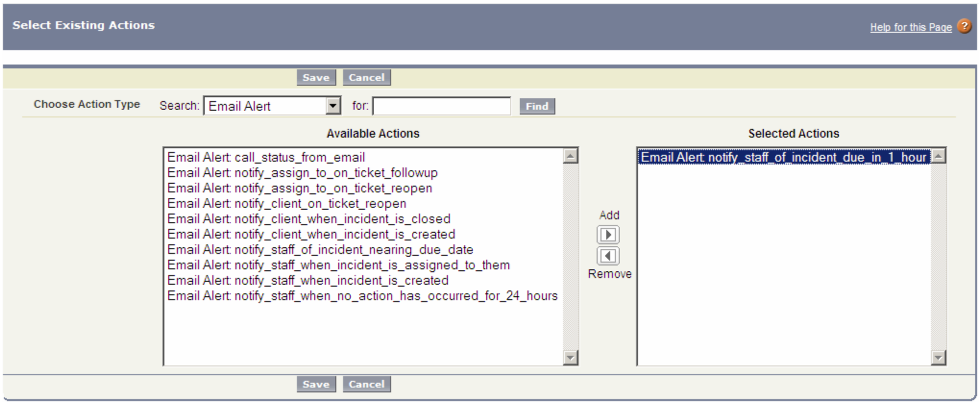
The time trigger that you have created appears in the Time-Dependent Workflow Actions section.

i To add an existing workflow action for the time trigger you have created, in the Time-Dependent Workflow Actions section, from the **Add Workflow Action** list, select the **Select Existing Action**.

j In the Select Existing Actions page, from the **Choose Action Type** list, select the **Email Alert** type of action.

k In the **Available Actions** list, select the **Email Alert: notify_staff_of_incident_due_in_1_hour** action.

l To move the selected action from the **Available Actions** list to the **Selected Actions** list, click **Add**.



m Click **Save**.

n In the upper left section of the Edit Rule page, click **Done**.

The time trigger and workflow action are created for the Notify the assigned staff member when an incident is nearing its Due Date workflow.

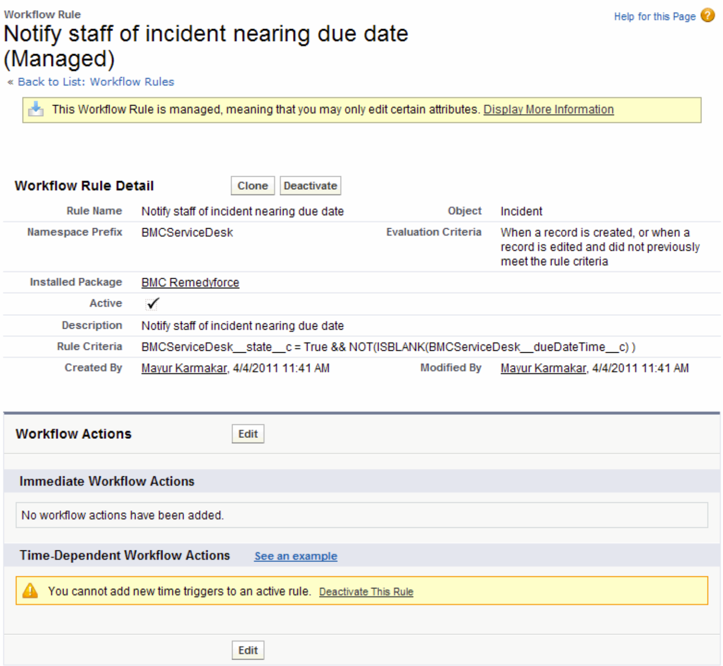
4 To return to the All Workflow Rules page, in the upper left section of the Edit Rules page, click the **Back to List: Workflow Rules** link.

5 For the Notify staff of incident nearing due date workflow, perform the following actions:

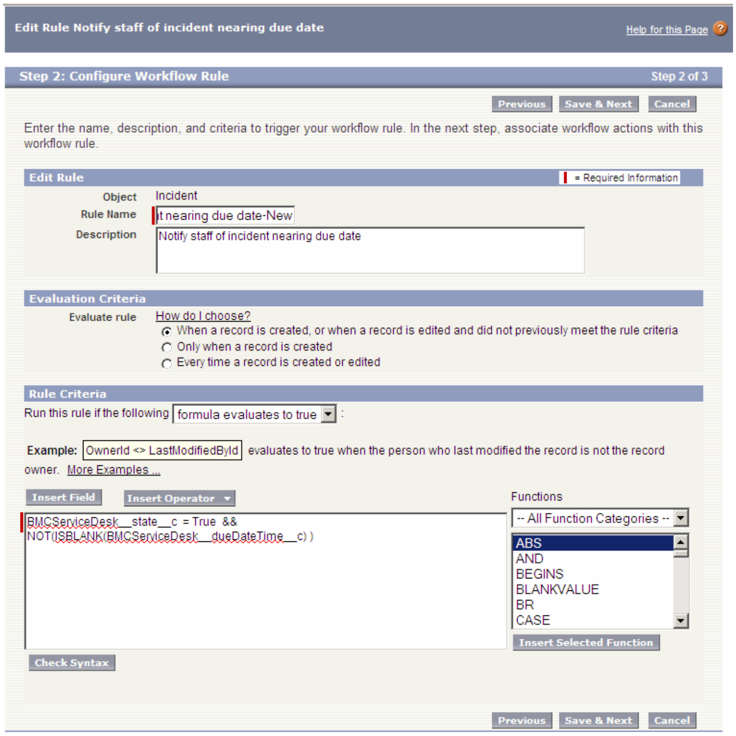
a In the All Workflow Rules page, in the **Rule Name** column, click the **Notify the assigned staff member when an incident is nearing its Due Date** workflow.

b In the Workflow Actions section, click **Edit**.

c In the Workflow Rule Detail section, click **Clone**.

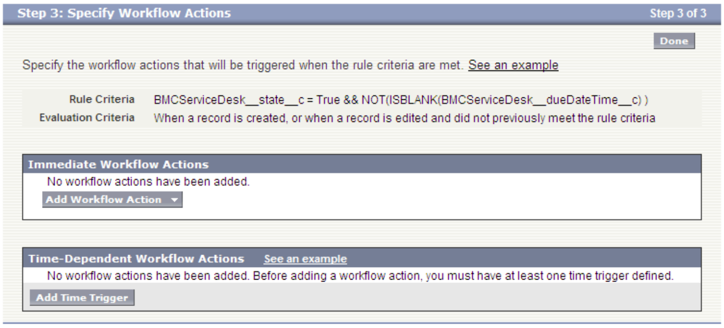


d In the Edit Rule section, in the **Rule Name** field, type a new name for the workflow rule.



e Click **Save & Next**.

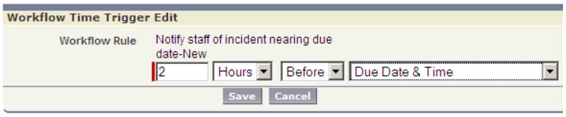
f In the Time-Dependent Workflow Actions section of the Edit Rule page, click **Add Time Trigger**.



g For the time trigger, enter the following values:

- `2`
- `Hours`
- `Before`
- `Due Date & Time`

These values indicate that the workflow executes two hours before the Due Date & Time of the incident.



h Click **Save**.

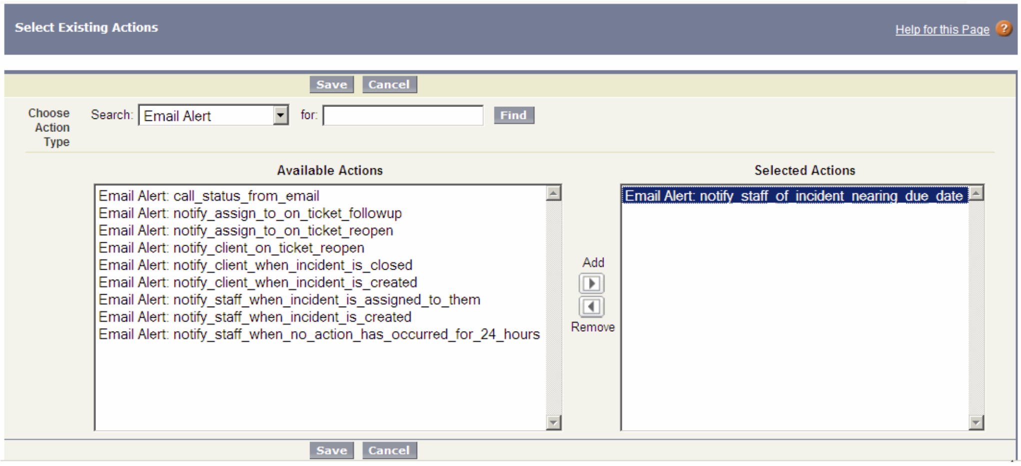
The time trigger that you have created appears in the Time-Dependent Workflow Actions section.

i To add an existing workflow action for the time trigger that you have created, from the **Add Workflow Action** list in the Time-Dependent Workflow Actions section, select the **Select Existing Action**.

j In the Select Existing Actions page, from the **Choose Action Type** list, select the **Email Alert** type of action.

k In the **Available Actions** list, select the **Email Alert: notify_staff_of_incident_nearing_due_date** action.

l To move selected action to the **Selected Actions** list, from the **Available Actions** list, click **Add**.

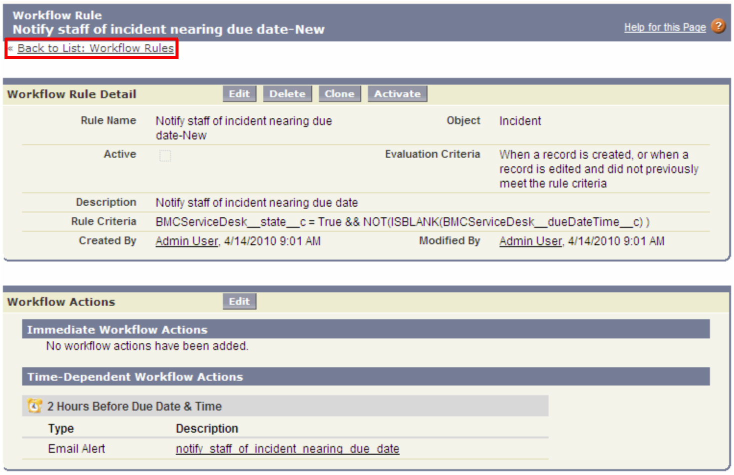


m Click **Save**.

n In the upper left section of the Edit Rule page, click **Done**.

The time trigger and workflow action are created for the Notify staff of incident nearing due date workflow.

6 To return to the All Workflow Rules page, in the upper left section of the Edit Rules page, click the **Back to List: Workflow Rules** link.



7 For the Notify the assigned staff member when no action has occurred for 24 hours workflow, perform the following actions:

a In the All Workflow Rules page, in the **Rule Name** column, click the **Notify the assigned staff member when no action has occurred for 24 hours** workflow.

b In the Workflow Rule Detail section, click **Clone**.

c In the Edit Rule section, in the **Rule Name** field, type a new name for the workflow rule.

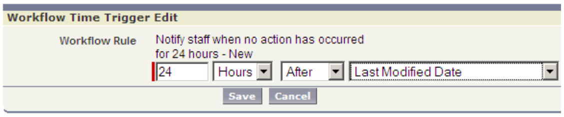
d Click **Save & Next**.

e In the Time-Dependent Workflow Actions section of the Edit Rule page, click **Add Time Trigger**.

f Enter the following values for the time trigger:

- `24`
- `Hours`
- `After`
- `Last Modified Date`

These values indicate that the workflow executes 24 hours after the incident was last modified.



g Click **Save**.

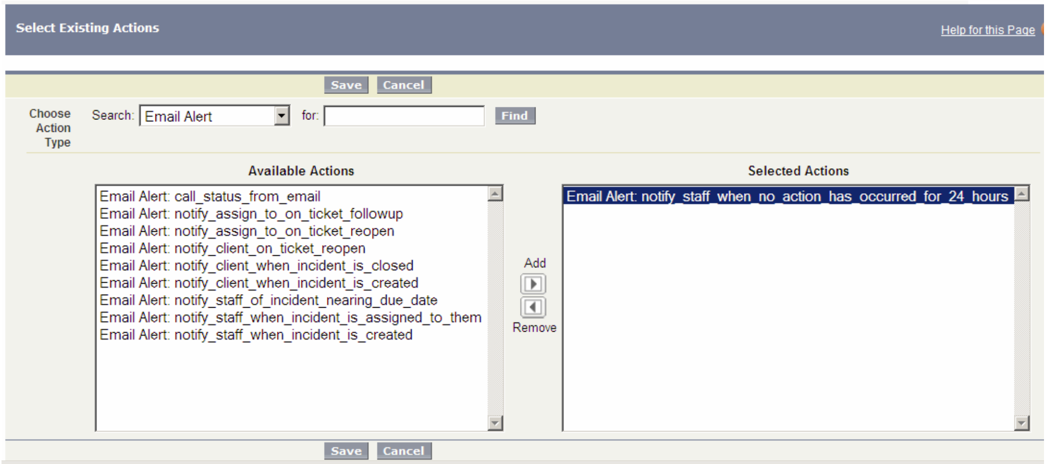
The time trigger that you have created appears in the Time-Dependent Workflow Actions section.

h To add an existing workflow action for the time trigger you have created, select the **Select Existing Action from the Add Workflow Action** list.

i In the Select Existing Actions page, from the **Choose Action Type** list, select the **Email Alert** type of action.

j In the **Available Actions** list, select the **Email Alert: notify_staff_when_no_action_has_occurred_for_24_hours** action.

k To move selected action from the **Available Actions** list to the **Selected Actions** list, click **Add**.



l Click **Save**.

m In the upper left section of the Edit Rule page, click **Done**.

The time trigger and workflow action are created for the Notify the assigned staff member when an incident is nearing its Due Date workflow.

8 To return to the All Workflow Rules page, in the upper left section of the Edit Rules page, click the **Back to List: Workflow Rules** link.

9 For the Notify Author that the Article is due for review workflow, perform the following actions:

a In the All Workflow Rules page, in the **Rule Name** column, click the **Notify Author that the Article is due for review** workflow.

b In the Workflow Actions section, click **Edit**.

c Click **Add Time Trigger**.

d In the Workflow Time Trigger Edit section, specify the number of days or hours before the Review Date of the knowledge article.

e Click **Save**.

f In the Time-Dependent Workflow Actions section, select **Select Existing Action** and click **Go**.

g From the **Available Actions** list, select **Email Alert: Send email when article is due for review** and click the right arrow.

h Click **Save**.

Updating the default configuration

After you have installed the managed package, you can make changes to the default configuration of BMC Remedyforce. You can change the Navigator assignments that are configured for each out-of-the-box profile. Additionally, you can customize the Application Settings (**Configuration** > **Configuration** > **Application Settings**) and Self Service Settings (**Configuration** > **Self Service** > **Self Service Settings**). For more information, see the BMC Remedyforce Online Help.

Adding staff members

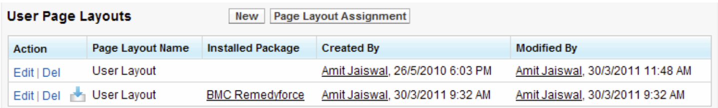
You can make existing users as BMC Remedyforce staff members or add new users and make them staff members. To add a user as a BMC Remedyforce staff member, you must customize the default Salesforce.com User page layout to use the User Layout page layout, which is available when you install the managed package. After customizing the User page layout, you must edit existing user records or create new user records, and select the ServiceDesk Staff check box to designate the user as a BMC Remedyforce staff member.

▶ To add staff members

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

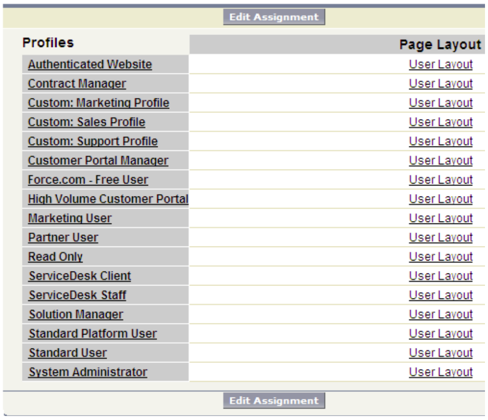
2 Navigate to **Setup** > **App Setup** > **Customize** > **Users** > **Page Layouts**.


User Page Layouts New | Page Layout Assignment

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit | Del	User Layout		Amit Jaiswal, 26/5/2010 6:03 PM	Amit Jaiswal, 30/3/2011 11:48 AM
Edit | Del	User Layout	BMC Remedyforce	Amit Jaiswal, 30/3/2011 9:32 AM	Amit Jaiswal, 30/3/2011 9:32 AM

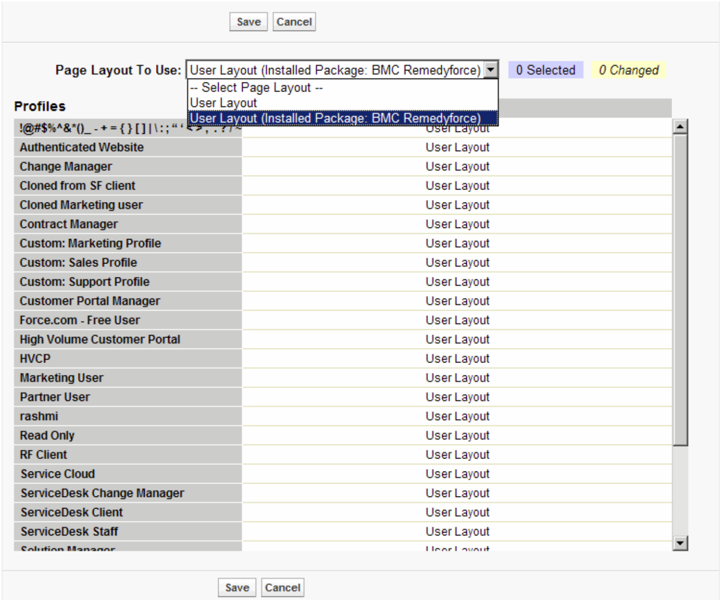
3 In the User Page Layout page, click **Page Layout Assignment**.

4 In the Page Layout Assignment page, click **Edit Assignment**.



5 Select the profiles whose users you want to add as BMC Remedyforce staff members and the profiles who are going to manage users of the ServiceDesk Staff and ServiceDesk Client profiles.

6 From the **Page Layout To Use** list, select the **User Layout (Installed Package: BMC Remedyforce)** page layout.



7 Click **Save**.

The User Layout (Installed Package: BMC Remedyforce) page layout is assigned to all users of the selected profiles.

8 Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Users**.

9 To create new users and add them as staff members, perform the following actions:

a Click **New**.

b From the **Role** list, select a role for the staff member.

c From the **Profile** list, select the **ServiceDesk** profile for the staff member.

10 To make existing users as staff members, perform the following actions:

a For the user to be added as a staff member, in the **Action** column, click **Edit**.

b In the BMC Remedyforce section, select the **ServiceDesk Staff** check box.

NOTE

All users can log on to Self Service using the Self Service website URL even if the **ServiceDesk Staff** check box is cleared.

11 Click **Save**.

Adding the SelfService Preferences field to User Layout

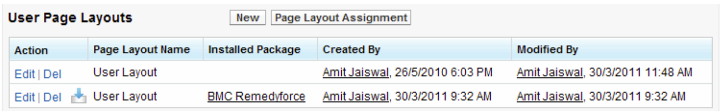
The SelfService Preferences field is used to restore the Self Service home page layout preferences of a user. When Self Service users customize their Self Service home page, for example, re-arrange the portlets in the Self Service home page, this customization is stored in the SelfService Preferences field. When a system administrator wants to restore the default Self Service home page for a user, the system administrator can delete the contents of the SelfService Preferences field. You must add this field to the User Layout page layout to allow the system administrator to restore the default Self Service home page when a Self Service user requests it.

▶ To add the SelfService Preferences field to User Layout

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **App Setup** > **Customize** > **Users** > **Page Layouts**.

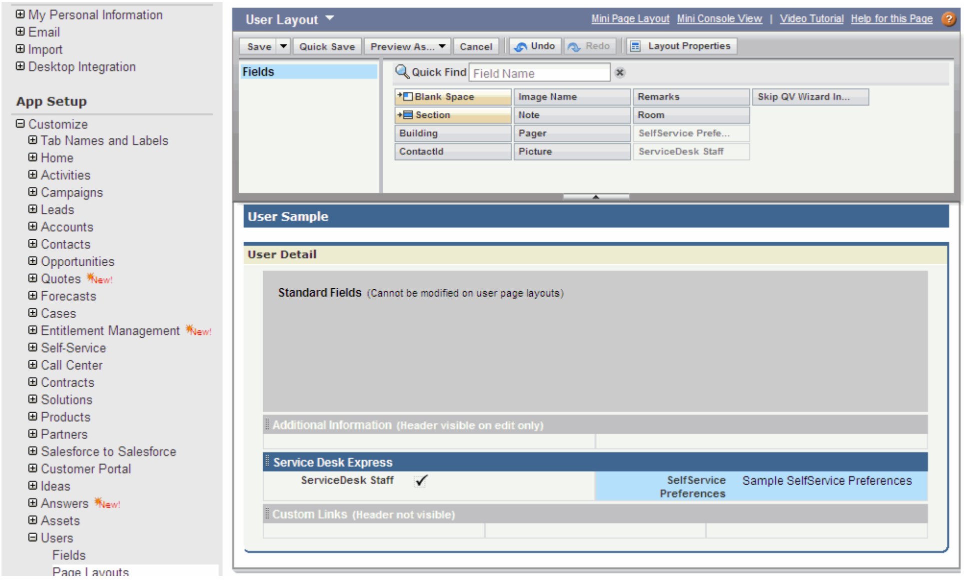


User Page Layouts   New   Page Layout Assignment

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit | Del	User Layout		Amit Jaiswal, 26/5/2010 6:03 PM	Amit Jaiswal, 30/3/2011 11:48 AM
Edit | Del	User Layout	BMC Remedyforce	Amit Jaiswal, 30/3/2011 9:32 AM	Amit Jaiswal, 30/3/2011 9:32 AM

3 In the User Page Layout page, click **Edit**.

4 Drag the **SelfService Preferences** field from the Fields section to the Additional Information section.



5 Click **Save**.

Assigning a license to your user account

When you receive an email from Salesforce.com with your logon credentials, you must assign a license to your user account for the managed package that is installed on your Salesforce.com organization.

▶ To assign a license to your user account

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup > App Setup > View Installed Packages**.

3 In the **Package Name** column, click **BMC Remedyforce**.

4 Click **Manage Licenses**.

5 Click **Add Users**.

6 Select the credentials of the user that were sent in the email.

7 Click **Add**.

8 To access BMC Remedyforce, from the Force.com App Menu in the upper right section, select **BMC Remedyforce**.

Configuring the BMC Remedyforce dashboard

To make the BMC Remedyforce dashboard available to users of the ServiceDesk Staff profile, you must configure the Running User property of the dashboard to be a user with a Salesforce Platform license. Additionally, you must select a user who is high in the role hierarchy because the data visibility of the Running User is applied to the dashboard.

To configure the BMC Remedyforce dashboard

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

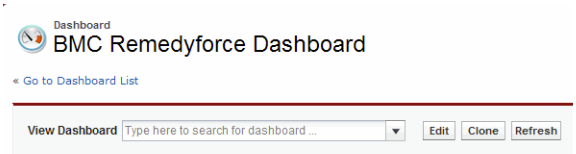
2 Click the **Dashboards** tab.

NOTE

If the **Dashboards** tab is not visible, click the **All Tabs** tab (the plus icon) and click **Dashboards**.

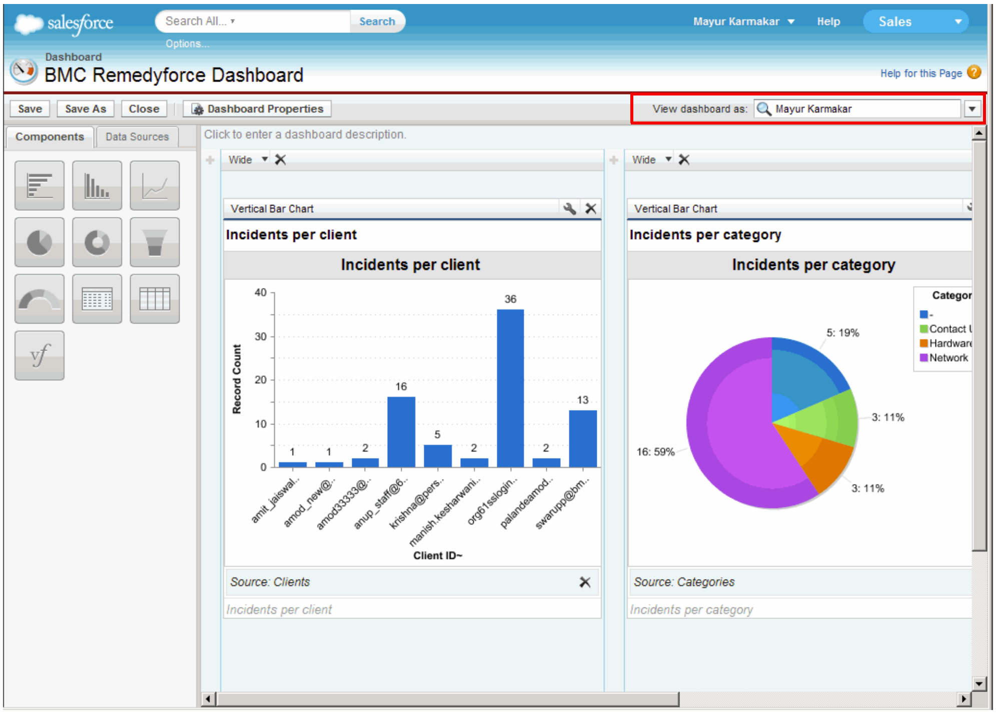
3 From the **View Dashboard** list, select **BMC Remedyforce Dashboard**.

The BMC Remedyforce Dashboard appears with updated data.



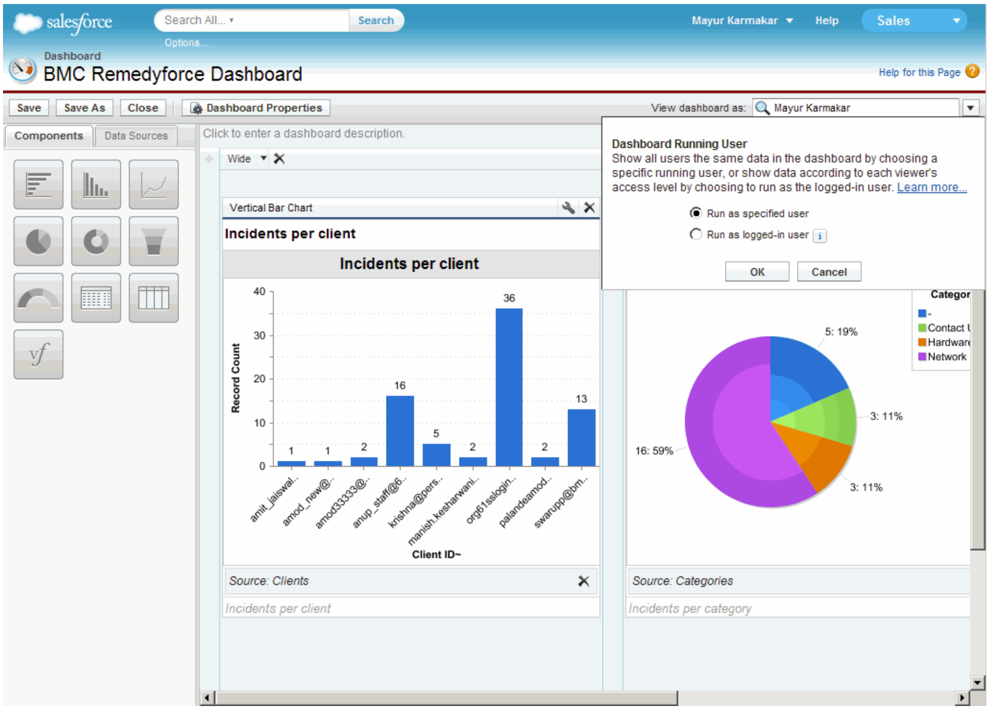
4 Click **Edit**.

You can select the user for whom you want to view the dashboard from the **View dashboard as** list.



5 Click the **View dashboard as** list.

The dashboard running user details are displayed. By default, the **Run as selected user** option is selected.



6 In the View Dashboard as text box, type the name of the user for whom you want to view the dashboard.

If you select **Run as logged in user**, the dashboard for the logged-in user is displayed.

7 Click **Save**.

Single Sign-On with Force.com

You can implement Single Sign-On with Force.com for your users to allow seamless access to BMC Remedyforce. Follow the instructions at `http://wiki.developerforce.com/index.php/How_to_Implement_Single_Sign-On_with_Force.com` to implement Single Sign-On.

Configuring Salesforce Mobile for your organization

Salesforce Mobile allows you to access the latest data in your organization through mobile devices, such as BlackBerry®, Treo™, iPhone™, or Windows Mobile®. If you want your staff members to access data from a mobile device, you must configure Salesforce Mobile by completing the following steps:

Step 1 Create a mobile configuration.

Step 2 Assign users and profiles to the mobile configuration.

Step 3 Add the required data sets to the mobile configuration.

Step 4 Select the tabs that must appear in Salesforce Mobile.

Step 5 Create a mobile view for the Incident object.

Step 6 Add the required fields to the page layout of the Incident object.

Step 7 Download Salesforce Mobile on your mobile device and activate it.

NOTE

Using the following configuration of Salesforce Mobile, when you access BMC Remedyforce from Salesforce Mobile, you can create new incident records and update incident records in BMC Remedyforce.

For more information about Salesforce Mobile, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=overview_appxmobile.htm&loc=help&hash=topic-title`.

NOTE

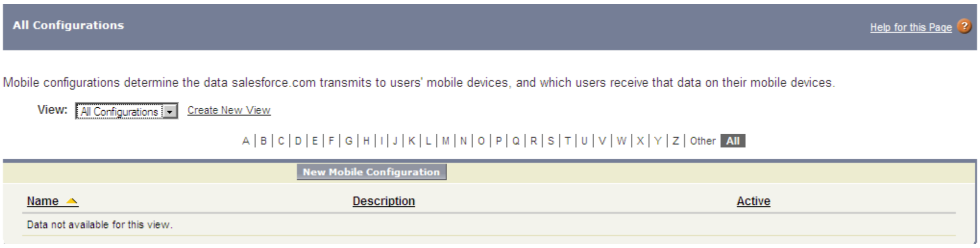
If Self Service is configured on a sandbox, you cannot connect to Self Service from BMC Remedyforce mobile application on your mobile device.

▶ To configure Salesforce Mobile for your organization

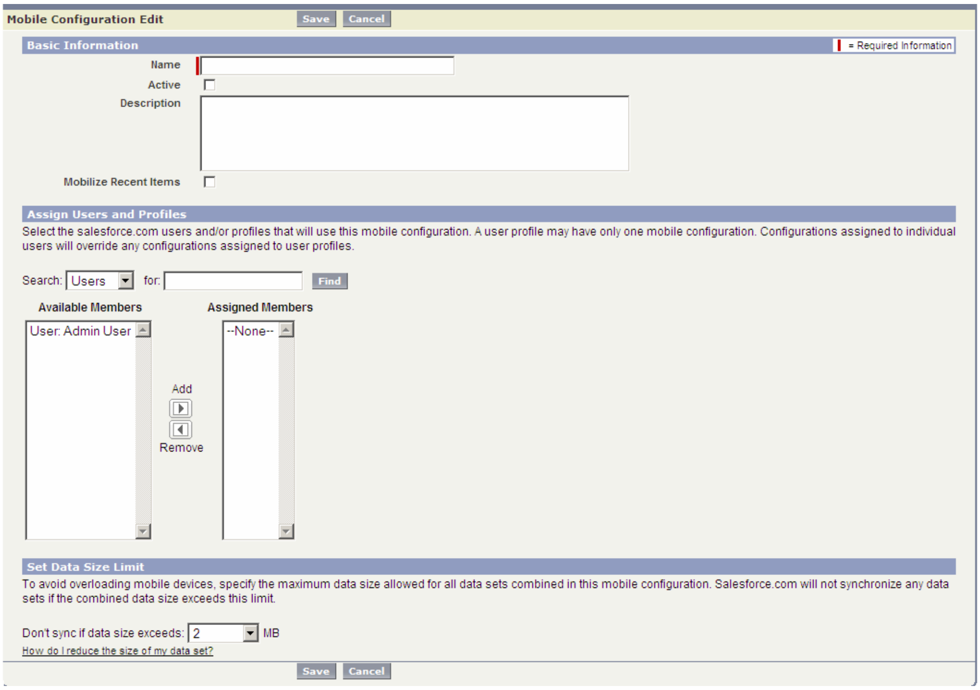
1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

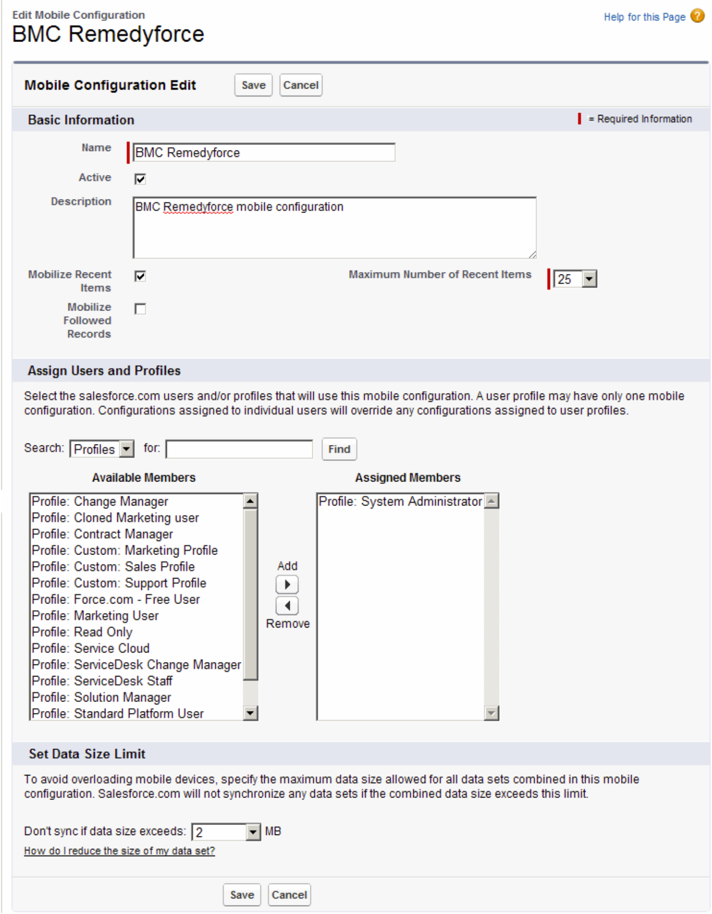
2 Navigate to **Setup** > **Administration Setup** > **Mobile Administration** > **Salesforce Mobile** > **Configurations**.



3 Click **New Mobile Configuration**.



4 Enter values for the mobile configuration by following the instructions at https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=creating_mobile_configs.htm&loc=help&hash=topic-title.

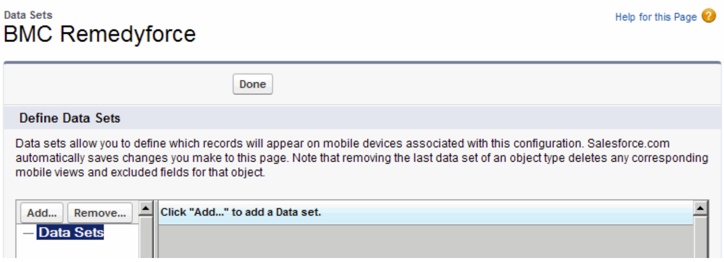


5 Click **Save**.

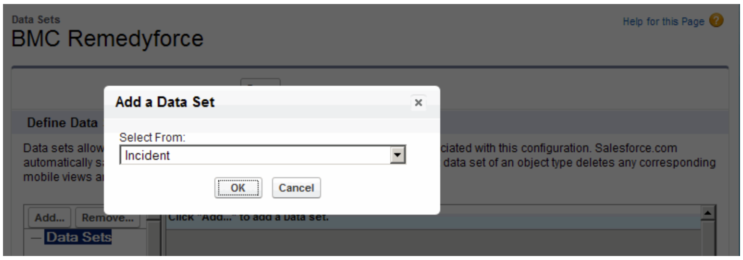
6 In the Data Sets section, click **Edit**.

7 In the Define Data Sets section, click **Add**.

For more information about defining data sets, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=creating_data_sets.htm&loc=help&hash=topic-title.

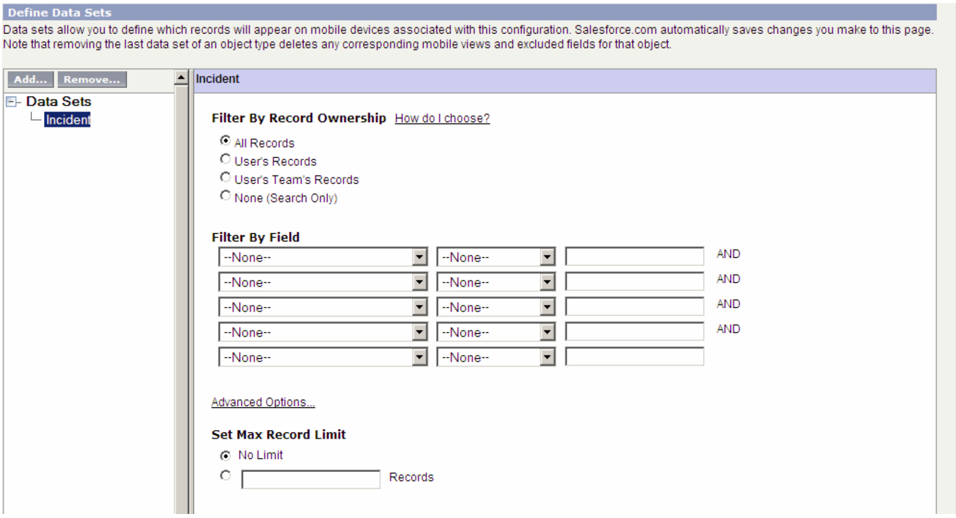


8 In the Add a Data Set window, from the **Select From** list, select the Incident data set.



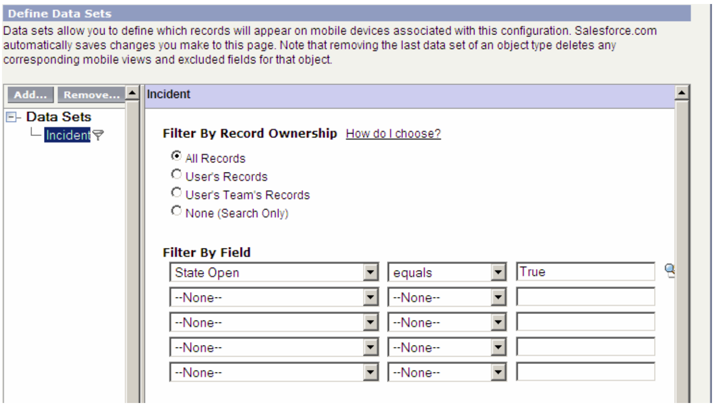
9 Click **OK**.

10 In the Filter By Record Ownership section, select the **All Records** option.

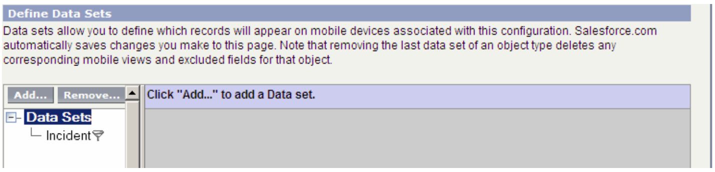


11 In **Filter By Field** for the Incident data set, create a condition with the following values:

`State Open equals True`



12 In the Data Sets section, select **Data Sets**.



13 Click **Add**.

14 In the Add a Data Set window, from the **Select From** list, select the **Category** data set.

15 Click **OK**.

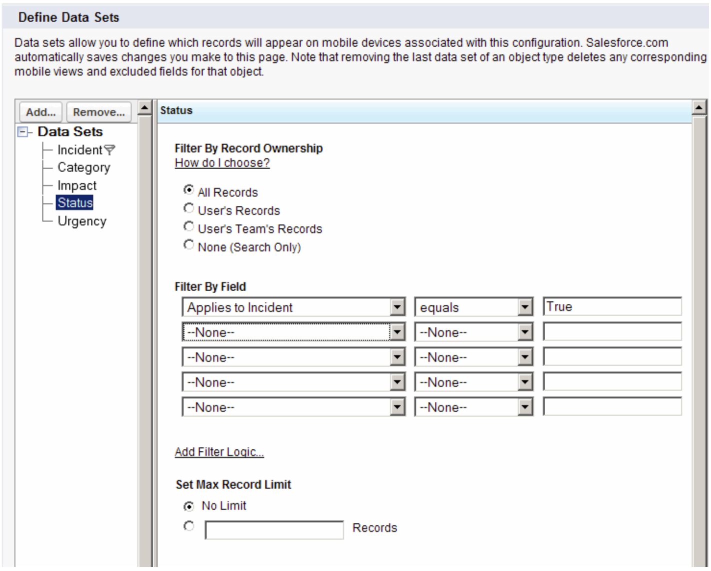
16 Repeat step 12 through step 15 for the following data sets:

- Impact
- Status
- Urgency

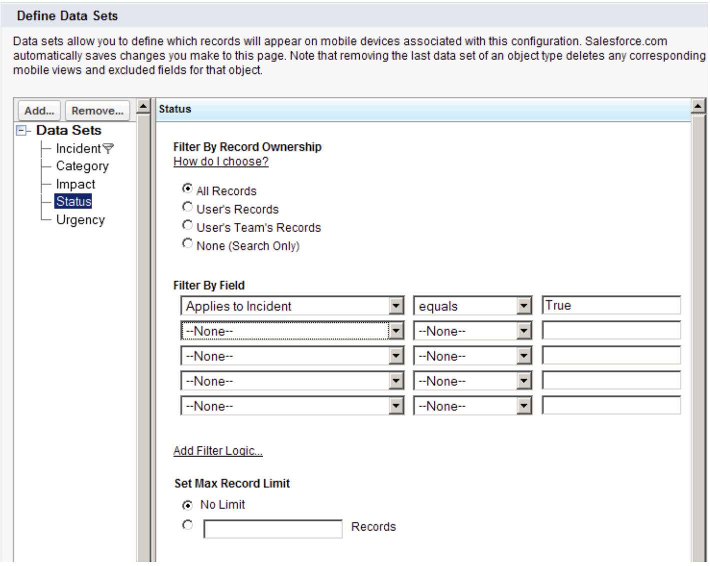
17 In the Data Sets section, select the **Status** data set.

18 In **Filter By Field** for the Status data set, create a condition with the following values:

```
Applies to Incident equals True
```



19 In the Set Max Record Limit section, define the maximum number of records that this data set can transfer to mobile devices.



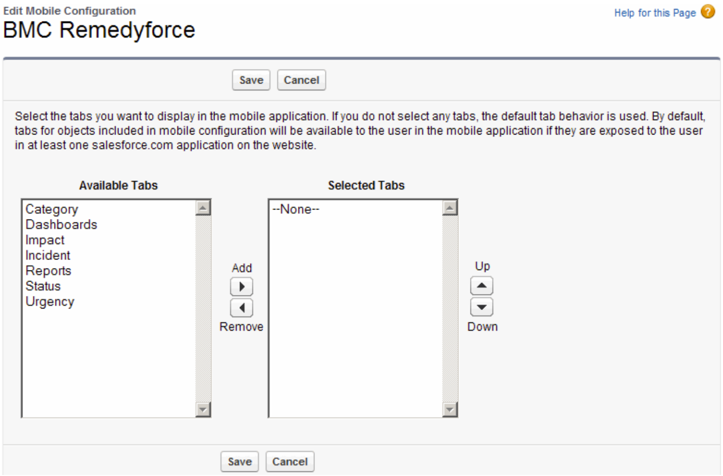
20 Click **Done**.

21 In the Mobile Tabs section, click **Edit**.

22 Click **Customize Tabs**.

23 In the **Available Tabs** list, select the **Incident** tab to display this tab in the mobile application.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=customize_mobile_tabs.htm&loc=help&hash=topic-title.



24 To move the **Incident** tab from the **Available Tabs** list to the **Selected Tabs** list, click the right arrow.

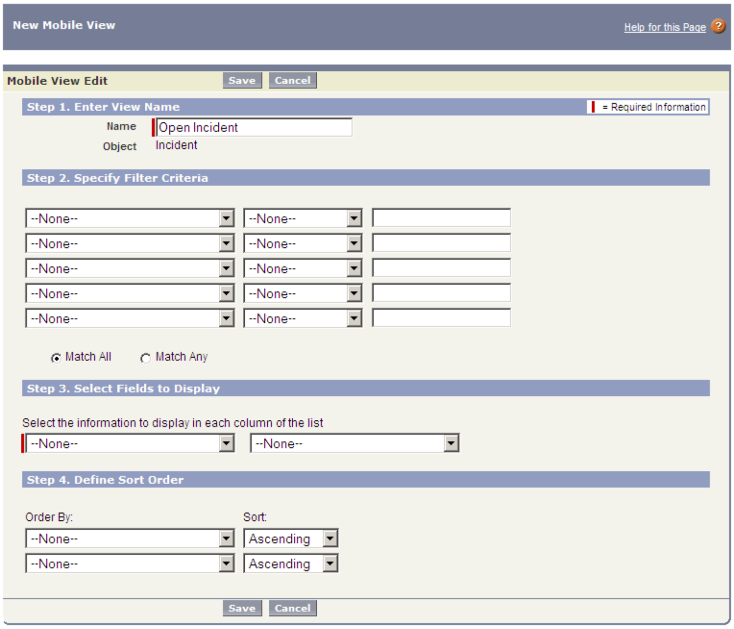
25 Click **Save**.

26 In the Mobile Views section, from the **Select an object** list, select the **Incident** object.

27 Click **New Mobile View**.

28 In the Step 1. Enter View Name section, in the **Name** field, type `Open Incident`.

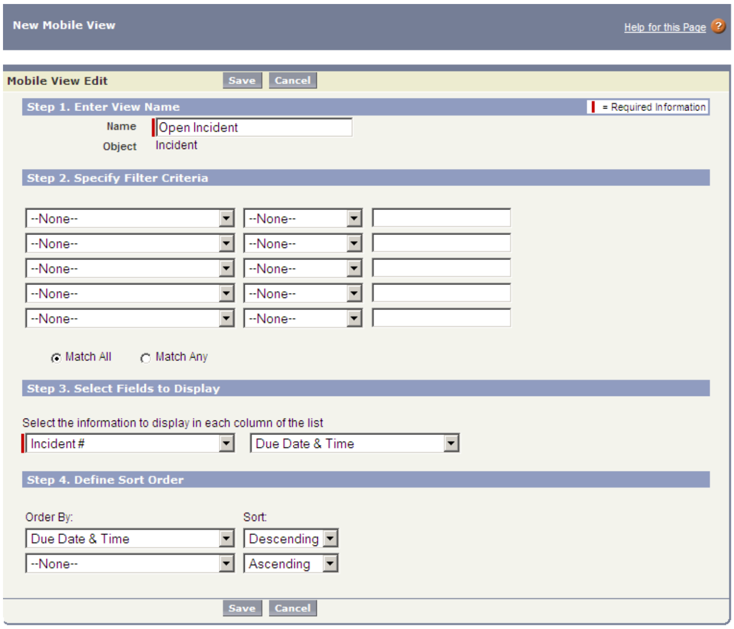
For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=creating_mobile_views.htm&loc=help&hash=topic-title.



29 In the Step 3. Select Fields to Display section, select the **Incident #** and **Due Date & Time** fields.

30 In the Step 4. Define Sort Order section, from the **Order by** list, select **Due Date & Time**.

31 From the **Sort** list, select **Descending**.



32 Click **Save**.

33 Download Salesforce Mobile on your mobile device from `http://mobile.salesforce.com/setup`.

34 Log on to Salesforce Mobile with valid credentials and activate the application.

The **Incident** tab displays Open Incidents that are sorted by the **Due Date & Time** field.

Chapter

2 Upgrading to BMC Remedyforce version 20.12.02.017.008

This section describes how to upgrade to BMC Remedyforce version 20.12.02.017.008.

The following topics are provided:

- Before upgrading to version 20.12.02.017.008 (page 74)
- Troubleshooting upgrade issues (page 74)
- Upgrading to version 20.12.02.017.008 (page 75)

Before upgrading to version 20.12.02.017.008

Before you upgrade, you must assign a default queue for all new incidents created in Self Service if you are upgrading a sandbox organization.

▶ To assign a queue for Self Service

1. In the left navigator of BMC Remedyforce, click **Configuration** > **Self Service**.
2. Click **Self Service Settings**.
3. In the Incidents section of the Defaults tab, click the **Incident Assignment to Queue** list.
4. In the Select from Queue window, select the required queue.
5. Click **Save**.

Troubleshooting upgrade issues

This section provides information about troubleshooting common upgrade issues and the workarounds for the issues.

Table 2-1: Upgrade issues and workarounds

Upgrade issue	Workaround

You cannot install a managed package on a sandbox organization when you click the URL of the installation link.	When you install a managed package on a sandbox organization, you must update the URL of the installation link by replacing **login.salesforce.com** with **test.salesforce.com**.
	Example
	Before the update, the installation link is:
	`https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tA0000000Emuu`
	After the update, the installation link is:
	`https://test.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tA0000000Emuu`

You cannot use Salesforce Mobile on a sandbox organization.	
If Self Service is configured on a sandbox, you cannot access Self Service from a mobile device.	

Upgrading to version 20.12.02.017.008

You must make configuration changes to your organization to start using version 20.12.02.017.008 of BMC Remedyforce.

NOTE

If you are upgrading from version 20.11.03.007, you must perform the configuration changes and enable the features released in version 20.12.01.009. For more information, see “Upgrading from version 20.11.03.007” on page 113.

Before you begin

Ensure that you complete the upgrade prerequisites and review “Troubleshooting upgrade issues” on page 74 before you upgrade. For more information, see “Before upgrading to version 20.12.02.017.008” on page 74.

To upgrade to version 20.12.02.017.008

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2. Install the managed package.

   For more information, see “Installing the managed package” on page 11.

3. To view posts, comments, and field updates that are made to a configuration item, enable feed tracking for the Base Element object.

   For more information, see “Enabling feed tracking for Salesforce Chatter” on page 23 and the *Using the CI Chatter Feed* section of the BMC Remedyforce Online Help.

4. To set **Unknown** as the default value for the **Processor Family, Processor Status, Processor Type, System Availability**, and **Upgrade Method** fields of the Processor class, perform the following actions:

   NOTE

   When you import data into the Processor class of the CMDB or create a configuration item of the Processor class, the configuration item must have **Unknown** as the default value for the **Processor Family, Processor Status, Processor Type, System Availability**, and **Upgrade Method** fields until you are able to determine the correct value of these fields.

   a. Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

   b. In the **Label** column, click **Processor**.

   c. In the **Field Label** column of the Custom Fields & Relationships section, click **Processor Family**.

d In the Picklist Values section, click **Edit** next to **Unknown**.

e Select the **Default** check box.

f Click **Save**.

g Click the **Back to Processor** link.

h Repeat step c through step g for the following fields:

- **Processor Status**
- **Processor Type**
- **System Availability**
- **Upgrade Method**

5 To set **Unknown** as the default value for the **Processor Family, Processor Status, Processor Type, System Availability**, and **Upgrade Method** fields of the CMDB Staging class, perform the following actions:

NOTE

When you import data into the Processor class of the CMDB, the configuration item must have **Unknown** as the default value for the **Processor Family, Processor Status, Processor Type, System Availability**, and **Upgrade Method** fields until you are able to determine the correct value of these fields.

a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

b In the **Label** column, click **CMDB Staging**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **ProcessorFamily**.

d In the Picklist Values section, click **Edit** next to **Unknown**.

e Select the **Default** check box.

f Click **Save**.

g Click the **Back to CMDB Staging** link.

h Repeat step c through step g for the following fields:

- **ProcessorStatus**
- **ProcessorType**
- **SystemAvailability**
- **UpgradeMethod**

6 To allow users to select additional sources of their incidents, perform the following actions:

a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

b In the **Label** column, click **Incident**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **Incident Source**.

d In the Picklist Values section, click **New**.

e Type the following values and press **Enter** after typing each value for the value to be on its own line:

- `Email message`
- `Event`
- `Fax, Letter, Paper form, or Memo`
- `Own observation`
- `Personal visit`
- `Web request form`

f Click **Save**.

7 To allow users to select **Header Section** as the type of Input field for service request definitions, perform the following actions:

a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

b In the **Label** column, click **Fulfillment Input**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **Response Type**.

d In the Picklist Values section, click **New**.

e To create a new picklist value for the **Response Type** field, type `Header Section` in the field.

f Click **Save**.

8 To allow users to select **General**, **Operational Rule**, and **Testing** as the types of tasks, perform the following actions:

a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

b In the **Label** column, click **Task**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **Task Type**.

NOTE

If you are using the original values: **Tasks**, **Approver**, and **Assessor**, click **New** and add the new values: **General**, **Operational Rule**, and **Testing**, to the **Task Type** picklist.

d In the Picklist Values section, edit the following picklist values and replace them with new values as listed below:

Old Value	New Value
Approver	General
Assessor	Operational Rule
Task	Testing

e In the Picklist Values section, click **Edit** for **Approver**.

f In the **Task Type** field, delete **Approver** and type `General`.

g Click **Save**.

h In the Picklist Values section, click **Edit** for **Assessor**.

i In the **Task Type** field, delete **Assessor** and type `Operational Rule`.

j Click **Save**.

k In the Picklist Values section, click **Edit** for **Task**.

l In the **Task Type** field, delete **Task** and type `Testing`.

m Click **Save**.

9 To allow users to create templates for releases, perform the following actions:

a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

b In the **Label** column, click **Template**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **Template For**.

d In the Picklist Values section, click **New**.

e To create a new picklist value for the **Template For** field, type `Release` in the field.

f Click **Save**.

10 To enable Visualforce pages for the ServiceDesk Client profile, perform the following actions:

a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.

b In the **Profile Name** column, click the **ServiceDesk Client** profile.

c In the Enabled Visualforce Page Access section, click **Edit**.

d To make the Visualforce pages accessible in addition to the list of pages already enabled, in the **Available Visualforce Pages** list, select the following Visualforce pages:

- **BMCServiceDesk.FeedbackSurveyPage**
- **BMCServiceDesk.StageHTMLProviderPage**
- **BMCServiceDesk.StdChangeRequestCategoryTree**
- **BMCServiceDesk.StdChangeRequestExtension**
- **BMCServiceDesk.StdChangeRequestTicker**
- **BMCServiceDesk.StdSelfServiceHome**

e To move the selected Visualforce pages from the **Available Visualforce Pages** list to the **Enabled Visualforce Pages** list, click the right arrow.

The **Enabled Visualforce Pages** list must contain the following Visualforce pages after you perform step d:

BMCServiceDesk.FeedbackSurveyPage	BMCServiceDesk.SSIncidentActionData
BMCServiceDesk.FileDownloadPage	BMCServiceDesk.SSIncidentCustom
BMCServiceDesk.KM_ArticleView	BMCServiceDesk.SSIncidentStatus
BMCServiceDesk.KM_PopularArticles	BMCServiceDesk.SSMyCartWidgetPage
BMCServiceDesk.KM_PreviewArticle	BMCServiceDesk.SSMyHelpRequests
BMCServiceDesk.SDEHome	BMCServiceDesk.SSMyProfile
BMCServiceDesk.SearchPage	BMCServiceDesk.SSQuickLinksPopup
BMCServiceDesk.SelfServiceCommonQA	BMCServiceDesk.SSQuickLinksWidget
BMCServiceDesk.SelfServiceHome	BMCServiceDesk.SSRedirect
BMCServiceDesk.SelfServicePopularRequest	BMCServiceDesk.SSSearchPage
BMCServiceDesk.SelfServiceSettingsCollection	BMCServiceDesk.SSSearchPortletPage
BMCServiceDesk.SSAttachmentUploadComplete	BMCServiceDesk.SSSiteLogin
BMCServiceDesk.SSBroadcastWidgetPage	BMCServiceDesk.SSSiteRegister
BMCServiceDesk.SSCategoryGroupingPage	BMCServiceDesk.SSTickerPage
BMCServiceDesk.SSCategorySearchPage	BMCServiceDesk.SSUserTemplate
BMCServiceDesk.SSChangePassword	BMCServiceDesk.StageHTMLProviderPage
BMCServiceDesk.SSContactUs	BMCServiceDesk.StdChangeRequestCategoryTree
BMCServiceDesk.SSDocumentationPage	BMCServiceDesk.StdChangeRequestExtension
BMCServiceDesk.SSFetchMobileConfig	BMCServiceDesk.StdChangeRequestTicker
BMCServiceDesk.SSForgotLoginInfo	BMCServiceDesk.StdSelfServiceHome
BMCServiceDesk.SSIncident	

f Click **Save**.

g Repeat step a through step f for the following profiles:

- ServiceDesk Staff
- ServiceDesk Change Manager
- Profiles where you have configured the **ServiceDesk Change Manager**, **ServiceDesk Client**, and **ServiceDesk Staff** levels of access when you installed the managed package.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=distribution_installing_packages.htm&loc=help&hash=topic-title.

11 In the Salesforce page layouts of BMC Remedyforce, if you have created approval processes for incidents or change requests and you are using the out-of-the-box email templates to notify approvers, perform the following actions:

a Check your Salesforce.com URL to determine which server hosts your Salesforce.com organization.

For example, if the na12 Salesforce.com server hosts your Salesforce.com organization, your Salesforce.com URL is as follows:

https://na12.salesforce.com/home/home.jsp

If the **ap1** Salesforce.com server hosts your Salesforce.com organization, your Salesforce.com URL is as follows:

https://ap1.salesforce.com/home/home.jsp

b Navigate to **Setup** > **Administration Setup** > **Communication Templates** > **Email Templates**.

c From the **Folder** list, select **BMC Remedyforce Email Templates**.

Depending on when you initiated your Salesforce.com organization, the **Folder** list might display **SDE Emails** instead of BMC Remedyforce Email Templates. If you have **SDE Emails** in the **Folder** list, select **SDE Emails**.

d In the **Action** column for the approval email template, click **Edit**.

In the **Email Body** field, replace **<*Salesforce.com-instance*>** with the correct name of the Salesforce.com server that hosts your Salesforce.com organization.

For example, if the **na12** Salesforce.com server hosts your Salesforce.com organization, replace **<*Salesforce.com-instance*>** with **na12**.

Before the update	After the update
For the Incident: Approval Required Email template https://**<Salesforce.com-instance>**.salesforce.com/{!BMCServiceDesk__Incident__c.Id}	**For the Incident: Approval Required Email template** https://**na12**.salesforce.com/{!BMCServiceDesk__Incident__c.Id}
For the Change Request: Approval Required Email template https://**<Salesforce.com-instance>**.salesforce.com/{!BMCServiceDesk__Change_Request__c.Id}	**For the Change Request: Approval Required Email template** https://**na12**.salesforce.com/{!BMCServiceDesk__Change_Request__c.Id}

e Click **Save**.

Deprecated workflows

The following workflows have been deprecated:

- Open popup dialog for recalculating due date when priority of incident changes
- Open popup dialog for recalculating due date when priority of problem changes

- Open popup dialog for recalculating due date when priority of task change

Therefore, these workflows must be deactivated in your Salesforce organization. If these are not deactivated, duplicate tasks or change requests can be created for a Service Request.

To deprecate a workflow, navigate to **App Setup > Create > Workflow & Approvals > Workflow Rules**.

Chapter

3 Enabling the new features released in version 20.12.02.017.008

To use the new features released in version 20.12.02.017.008, you must to set up and configure these features:

- Assigning lightweight page layouts to objects (page 84)
- Assigning version 3.0 page layouts to objects (page 86)
- Enabling the Home, Chatter, and Remedyforce Self Service tabs for client profiles (page 87)
- Assigning the Incident, Change, and Remedyforce Client Home page layouts to Self Service client profiles (page 88)
- Assigning the Remedyforce Contact page layout to profiles (page 89)
- Displaying the Remedyforce Search and BMC Remedyforce components in the Home tab (page 90)
- Updating the Search layouts to display inactive records and system templates (page 92)
- Updating the User Search layout to display details of the staff member (page 93)
- Configuring the integration between BMC Remedyforce and BMC FootPrints Asset Core (page 93)
- Collecting feedback through an email survey (page 103)
- Allowing users to enter workarounds for problems (page 107)
- Enabling the Auditing feature for configuration items (page 107)
- Enabling enhanced lookups (page 108)
- Making statuses available to problems (page 109)
- Creating the Needs Update option for feedback on knowledge article (page 110)

Assigning lightweight page layouts to objects

BMC Remedyforce version 20.12.02.017.008 provides lightweight page layouts for the following objects:

- Broadcast
- Change Request
- Incident
- Problem
- Release
- Task

Lightweight page layouts provide a simplified starting point and improve ease of use. They load and respond very quickly. Lightweight page layouts allow you to create records quickly by entering only the basic information required for the record. They also are easy to configure. You choose to customize the page layouts and add only those additional features that you use frequently.

▶ To assign lightweight page layouts to objects

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.
2. Navigate to **Setup** > **App Setup** > **Create** > **Objects**.
3. Click **Broadcast**.
4. In the **Page Layouts** section, click **Page layout Assignment**.
5. Click **Edit Assignment**.
6. Select the required profiles.
7. From the **Page Layout To Use** list, select **Remedyforce Broadcast Light 1.0**.
8. Click **Save**.
9. Repeat step 3 to step 8 for the following objects:
   - Change Request
   - Incident
   - Problem
   - Release
   - Task

NOTE

Ensure that you select the Light 1.0 page layout for these objects.

10 After assigning the lightweight page layouts to the required objects, you must arrange the tabs match the way you work. Perform the following actions:

a Navigate to **Setup> App Setup** > **Create** > **Apps**.

b In the **Action** column beside **BMC Remedyforce**, click **Edit**.

c In the **Choose the Tabs** section, from the **Available Tabs** list, select the following tabs:

- Home
- Dashboards
- Incidents
- Tasks
- Problems
- Change Requests
- Releases
- Knowledge Articles
- Reports
- Remedyforce Administration
- Remedyforce Workspaces
- Remedyforce CMDB
- Chatter
- Broadcasts
- Remedyforce Dashboard
- Remedyforce Self Service

d To move the selected tabs to the **Selected Tabs** list, click the right arrow.

e In the **Selected Tabs** list, BMC recommends that you click the **Up** and **Down** arrows to arrange the tabs in the following order:

- Home
- Dashboards
- Incidents
- Tasks
- Problems
- Change Requests
- Releases
- Knowledge Articles
- Reports
- Remedyforce Administration

- Remedyforce Workspaces
- Remedyforce CMDB
- Chatter
- Broadcasts
- Remedyforce Dashboard
- Remedyforce Self Service

f To make the Dashboards tab as the landing tab, from the **Default Landing Tab** list, select **Dashboards**.

g Click **Save**.

11 After logging on, you might see **Setup** as the default landing tab in some cases even when you have selected **BMC Remedyforce** from the **Force.com App Menu** in the upper right section. To use the **Dashboards** tab as the default landing tab, perform the following actions:

a Navigate to **Personal Setup > My Personal Information > Personal Information**.

b Click **Edit**.

c Clear the **Make Setup My Default Landing Page** check box.

d Click **Save**.

Assigning version 3.0 page layouts to objects

BMC Remedyforce version 20.12.02.017.008 provides version 3.0 page layouts for the following objects:

- Broadcast
- Change Request
- Incident
- Problem
- Release
- Task

The version 3.0 page layouts contain all the new features created in version 20.12.02.017.008. If your users want to use all new features, you can assign the version 3.0 page layouts to these objects.

▶ To assign version 3.0 page layouts to objects

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2 Navigate to **Setup > App Setup > Create > Objects**.

3 Click **Broadcast**.

4 In the **Page Layouts** section, click **Page layout Assignment**.

5 Click **Edit Assignment**.

6 Select the required profiles.

7 From the **Page Layout To Use** list, select **Remedyforce Broadcast Version 3.0**.

8 Click **Save**.

9 Repeat step 3 to step 8 for the following objects:

- Change Request
- Incident
- Problem
- Release
- Task

NOTE

Ensure that you select the Version 3.0 page layout for these objects.

Enabling the Home, Chatter, and Remedyforce Self Service tabs for client profiles

If you have created client profiles by using the Salesforce Platform, Salesforce, or Chatter Only licenses, you must enable the **Home**, **Chatter**, and **Remedyforce Self Service** tabs for these client profiles.

▶ To enable the Home, Chatter, and Remedyforce Self Service tabs for client profiles

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2 Navigate to **Setup > Administration Setup > Manage Users > Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.

3 In the **Profile Name** column, click **Edit** in the **Action** column for a client profile that is created by using the Salesforce Platform, Salesforce, or Chatter Only licenses.

4 In the Custom App Settings section, select the **BMC Remedyforce** check box.

5 In the Standard Tab Settings section, select **Default On** for the **Chatter** tab.

6 In the Custom Tab Settings section, select **Default On** for the **Remedyforce Self Service** tab.

7 For the remaining tabs in the Custom Tab Settings section, select **Tab Hidden**.

8 Click **Save**.

Assigning the Incident, Change, and Remedyforce Client Home page layouts to Self Service client profiles

For Self Service clients with the Salesforce, Salesforce Platform, or Chatter Only licenses, you must assign the **Remedyforce Client Incident Version 1.0** page layout to the required profiles of the Self Service clients. With this layout, these Self Service clients can perform the following actions:

- Log on by using the `https://login.salesforce.com` URL.
- Approve change requests, incidents, and service requests from the **Home** tab if these Self Service clients are assigned as an Approver in an approval process.

To view the details of the change request that is sent for approval to these Self Service clients, you must assign the **Remedyforce Change for Clients Version 1.0** page layout. After viewing the details of the change request, these Self Service clients can approve or reject the change request.

To view the Items to Approve section in the **Home** tab, you must assign the **Remedyforce Client Home** page layout. If there are pending approval records assigned to you, the Items to Approve section displays the records that you must approve or reject.

▶ To assign the Incident and Change page layout to client profiles

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.

3 In the **Profile Name** column, click the required profile.

4 For the Incident object in the Custom Object Layouts section, click the **View Assignment** link.

5 Click **Edit Assignment**.

6 Select the required Self Service client profiles.

7 From the **Page Layout To Use** list, select **Remedyforce Incident for Clients Version 1.0**.

8 Click **Save**.

9 For the Change Request object in the Custom Object Layouts section, click the **View Assignment** link.

10 Click **Edit Assignment**.

11 Select the required Self Service client profiles.

12 From the **Page Layout To Use** list, select **Remedyforce Change for Clients Version 1.0**.

13 Click **Save**.

14 Navigate to **Setup** > **App Setup** > **Customize** > **Home** > **Home Page Layouts**.

15 Click **Page layout Assignment**.

16 Click **Edit Assignment**.

17 For each Self Service client profile, select the **Remedyforce Client Home** page layout.

18 Click **Save**.

Assigning the Remedyforce Contact page layout to profiles

To view additional contact details in the Mini Page Layout of a contact when you create an incident for the contact, you must assign the Remedyforce Contact page layout to the Contact object. The following details are displayed after you assign the Remedyforce Contact page layout:

- First Name
- Last Name
- Account Name
- Phone
- Mobile
- Email
- Mailing Address

▶ To assign the Remedyforce Contact page layout to profiles

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2. Navigate to **Setup** > **App Setup** > **Customize** > **Contacts** > **Page Layouts**.
3. Click **Page layout Assignment**.
4. Click **Edit Assignment**.
5. Select the required profiles.
6. From the **Page Layout To Use** list, select **Remedyforce Contact**.
7. Click **Save**.

Displaying the Remedyforce Search and BMC Remedyforce components in the Home tab

For users to access the **Remedyforce Search** and **BMC Remedyforce** components in the home page, you must assign the **Remedyforce Home** page layout to the Home tab.

The **Remedyforce Search** component allows you to search in your BMC Remedyforce data only rather than searching in the data of all applications that you have installed on your Salesforce organization. When you assign the **Remedyforce Home** page layout to the **Home** tab, the **Remedyforce Search** component appears in the Sidebar.

The **BMC Remedyforce** component contains the following links:

- **Getting Started Videos**—Click this link to access the onboarding and configuration videos that are hosted at BMC Communities.
- **Getting Started Guide**—Click this link to view the *BMC Remedyforce Getting Started Guide*.
- **Remedyforce Help**—Click this link to view the BMC Remedyforce Online Help.
- **Remedyforce Community**—Click this link to access the BMC Remedyforce Service Desk Community at BMC Communities.
- **Contact Us**—Click this link to go the BMC Remedyforce product page at www.bmc.com. You can watch videos about the product, view more information about the product, sign up for a trial, and download the product datasheet.

When you assign the **Remedyforce Home** page layout to the **Home** tab, the **BMC Remedyforce** component appears below the **Remedyforce Search** component in the Sidebar.

To remove the **Remedyforce Search** or **BMC Remedyforce** components from the **Home** tab, edit the **Remedyforce Home** page layout.

You can also display the **Remedyforce Search** and **BMC Remedyforce** components on all pages for all users in your organization by customizing the User Interface.

▶ To display the Remedyforce Search and BMC Remedyforce components in the Home tab

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.
2. Navigate to **Setup > App Setup > Customize > Home > Home Page Layouts**.
3. Click **Page layout Assignment**.
4. Click **Edit Assignment**.
5. For each profile that you want to make the Remedyforce Search component or BMC Remedyforce component available, select the **Remedyforce Home** page layout.
6. Click **Save**.
7. To remove the **Remedyforce Search** or **BMC Remedyforce** components from the **Home** tab, perform the following actions:
   a. Navigate to **Setup > App Setup > Customize > Home > Home Page Layouts**.
   b. In the **Action** column next to **Remedyforce Home**, click **Edit**.
   c. In the Select Narrow Components to Show section, clear the **Remedyforce Search** or **BMC Remedyforce** check boxes.
   d. Click **Next**.
   e. Click **Save**.
8. To display the **Remedyforce Search** and **BMC Remedyforce** components on all pages for all users in your organization, perform the following actions:
   a. Navigate to **Setup > App Setup > Customize > User Interface**.
   b. In the Sidebar section, select the **Show Custom Sidebar Components on All Pages** check box.

      Now, these components are visible to all users, and users can choose to remove the components from the **Home** tab.
   c. Click **Save**.

Updating the Search layouts to display inactive records and system templates

To display inactive records in lookup windows, you must update the Search layout of the following objects to include the **Inactive** field:

- Broadcast
- Category
- Impact
- Priority
- Request Definition
- Template
- Urgency

When you include the **Inactive** field in the Search layout, you can differentiate between active and inactive records in a lookup window. When you click a lookup icon, the lookup window displays all active records. When you click the Show all results link, the lookup window displays both active and inactive records.

To display system templates in lookup windows, you must update the Search layout of the Template object to include the **System Template** field.

▶ To update the Search layouts to display inactive records and system templates

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2. Navigate to **Setup** > **App Setup** > **Create** > **Objects**.
3. To display inactive records in lookup windows, perform the following actions:
   a. Click **Broadcast**.
   b. In the Search Layouts section, click **Edit** in the Action column beside **Lookup Dialogs**.
   c. From the **Available Fields** list, select the **Inactive** field.
   d. Click the right arrow to move the **Inactive** field to the **Selected Fields** list.
   e. Click **Save**.
   f. Repeat step a through step e for the following custom objects:
      - Category
      - Impact
      - Priority

- Request Definition
- Template
- Urgency

4 To display system templates in lookup windows, perform the following actions:
   a Click **Template**.
   b In the Search Layouts section, click **Edit** in the **Action** column beside **Lookup Dialogs**.
   c From the **Available Fields** list, select the **System Template** field.
   d Click the right arrow to move the **System Template** field to the **Selected Fields** list.
   e Click **Save**.

Updating the User Search layout to display details of the staff member

To display the required details of the staff member in the lookup windows, you must update the User Search layout.

▶ To update the User Search layout to display details of the staff member

1 Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **App Setup** > **Customize** > **Users** > **Search Layouts**.

3 In the Search Layouts section, click **Edit** in the **Action** column beside **Lookup Dialogs**.

4 From the **Available Fields** list, select the **Account Name** field.

5 Click the right arrow to move the selected fields to the **Selected Fields** list.

6 Click **Save**.

Configuring the integration between BMC Remedyforce and BMC FootPrints Asset Core

To enable staff members to work with BMC FootPrints Asset Core devices in BMC Remedyforce, you must enable the integration between BMC Remedyforce and BMC FootPrints Asset Core at **Application Settings > BMC FootPrints** tab.

NOTE

Before you enable the integration, you must set up BMC FootPrints Asset Core as a remote site at **Setup > Administration Setup > Security Controls > Remote Site Settings**. You might need to repeat this step only if the URL or port is changed for BMC FootPrints Asset Core.

After you enable the integration and provide the BMC FootPrints Asset Core server and system administrator credentials, staff members must enter their BMC FootPrints Asset Core credentials the first time that they connect to BMC FootPrints Asset Core. The staff members do not need to enter their credentials for future connection attempts.

The following steps provide an overview of how to configure the integration between BMC Remedyforce and BMC FootPrints Asset Core. Details for each step are provided in following sections.

Step 1 Ensure that the BMC FootPrints Asset Core Web Service port is accessible over the Internet.

Step 2 Whitelist salesforce.com network IP addresses.

Step 3 Configure the BMC Remedyforce external integration on the BMC FootPrints Asset Core server.

Step 4 Install a Secure Socket Layer (SSL) certificate on the BMC FootPrints Asset Core server.

IMPORTANT

You must install a Secure Socket Layer (SSL) certificate for the integration to work.

Step 5 Set up BMC FootPrints Asset Core as a remote site in BMC Remedyforce.

Step 6 Configure the BMC FootPrints Asset Core server details in BMC Remedyforce.

Step 7 Configure the status mapping to track the progress of operational rules.

Step 8 Configure the Asset Core Processor to run the job that retrieves the latest logs and operational rule statuses from BMC FootPrints Asset Core.

Step 9 *(Optional)* Edit the page layout of the User object to display the **FootPrints Login ID** field.

Step 10 *(Optional)* Prevent users from editing the BMC FootPrints Asset Core user name stored in the **FootPrints Login ID** field of the User object by enabling the **Validate_FootPrints_Login** validation rule.

Step 11 Enable users to search for and link BMC FootPrints Asset Core devices to incidents in the Incident form.

▶ To configure the integration between BMC Remedyforce and BMC FootPrints Asset Core

1. Ensure that the BMC FootPrints Asset Core Web Service port is accessible over the Internet.

   BMC recommends that you only provide access to the Salesforce platform by whitelisting the valid Salesforce IP addresses. For more information about the Salesforce IP addresses to be whitelisted, see https://help.salesforce.com/apex/HTViewSolution?urlname=What-salesforce-com-network-IP-addresses-do-I-need-to-whitelist-1327108305372&language=en_US. Contact your IT system administrator to make the BMC FootPrints Asset Core Web Service port accessible over the internet and whitelist the valid Salesforce IP addresses.

2. Whitelist salesforce.com network IP addresses.

   For more information, see https://na1.salesforce.com/_ui/training/help/pub/UserEdSolution?id=50130000000MExc&retURL=https://na12.salesforce.com/_ui/training/help/CombinedSearchPage?str=whitelist&ps=1&orgId=00D000000000062.

3. To configure the BMC Remedyforce external integration on the BMC FootPrints Asset Core server, perform the following actions:

   a. In the BMC FootPrints Asset Core server, navigate to **Global Settings > External Integration**.

   b. Click the **Create BMC Remedyforce Integration** toolbar icon.

   c. In the Properties dialog box, click **Select an existing administrator**.

   d. In the Assign an Administrator dialog box, select the user who is a BMC FootPrints Asset Core administrator.

   e. *(Optional)* To create an incident in BMC Remedyforce when an alert is generated in BMC FootPrints Asset Core, in the **Application Login** field, type the user name of the BMC Remedyforce staff member who creates all incidents for BMC FootPrints Asset Core alerts and events.

   f. *(Optional)* To create an incident in BMC Remedyforce when an alert is generated in BMC FootPrints Asset Core, in the **Application Password** field, type the password of the BMC Remedyforce staff member who creates all incidents for BMC FootPrints Asset Core alerts and events.

g *(Optional)* To create an incident in BMC Remedyforce when an alert is generated in BMC FootPrints Asset Core, in the **Application Password** field, type the password and the security token of the BMC Remedyforce staff member who creates all incidents for BMC FootPrints Asset Core alerts and events.

In Salesforce, navigate to **Setup > Personal Setup > Reset My Security Token**. Click **Reset Security Token** and an email message is sent to your email address stored in Salesforce. In the **Password** field, append the security token to the password. For example, if your password is **mypassword** and your security token is **XXXXXXXXX**, then you must enter **mypasswordXXXXXXXXX** in the **Password** field. If **Reset Security Token** is not visible, you need to enter the password only.

For more information, see the *BMC FootPrints Asset Core - External Integration Guide*.

h To close the Assign an Administrator dialog box, click **OK**.

i To close the Properties dialog box, click **OK**.

4 To secure the transactions and encrypt the information passing between the BMC FootPrints Asset Core server and BMC Remedyforce, install a Secure Socket Layer (SSL) certificate on the BMC FootPrints Asset Core server.

For more information, see "Installing SSL certificates on the BMC FootPrints Asset Core server" on page 100.

5 To set up BMC FootPrints Asset Core as a remote site in BMC Remedyforce, perform the following actions:

a In the BMC Remedyforce home page, click **Configuration**.

b From the list of Configuration options, expand **Configuration**.

c In the **Configuration** list, click **Application Settings**.

NOTE

In the BMC Remedyforce tabbed view, **Application Settings** is available in the **Remedyforce Administration** tab.

d Click the **BMC FootPrints** tab.

e Click **Salesforce Remote Site Settings**.

The All Remote Sites page opens in a new tab.

f Click **New Remote Site**.

g In the **Remote Site Name** field, type the name of the remote site.

h In the **Remote Site URL** field, type the URL of the BMC FootPrints Asset Core server:port.

Ensure that you enter the same port number that you have entered in the **Web Service Port** field while installing the SSL certificate. For more information, see "Installing SSL certificates on the BMC FootPrints Asset Core server" on page 100.

Ensure that you include **https://** at the beginning of the URL. For more information, see `https://na9.salesforce.com/help/doc/user_ed.jsp?loc=help&target=configuring_remoteproxy.htm&section=Security`.

i Click **Save**.

6 To configure the BMC FootPrints Asset Core server details in BMC Remedyforce, perform the following actions:

a Navigate to the **Application Settings > BMC FootPrints** tab.

b Select the **Enable BMC FootPrints Asset Core Integration** check box.

The **Server Name**, **Server Port**, **User Name**, and **Password** fields are enabled when you select this check box.

c In the **Server Name** field, type the name or IP address of the BMC FootPrints Asset Core server.

You can type a maximum of 255 characters in the **Server Name** field. If the name of the server exceeds 255 characters, type the IP address of the server in the **Server Name** field.

NOTE

If you have entered an IP address in the **Server Name** field, you must ensure that you enter an IP address while creating the Salesforce Remote Site Setting.

d In the **Server Port** field, type the port number of the BMC FootPrints Asset Core server.

Ensure that you enter the same port number that you have entered in the **Web Service Port** field while installing the SSL certificate. For more information, see "Installing SSL certificates on the BMC FootPrints Asset Core server" on page 100.

e In the **User Name** field, type the user name of the BMC FootPrints Asset Core External Integration user.

f In the **Password** field, type the password of the BMC FootPrints Asset Core External Integration user.

The External Integration user is the user that you have configured in step 3d on page 95.

The password of the External Integration user cannot exceed 127 characters. If the password of the External Integration user exceeds 127 characters, change the password in BMC FootPrints Asset Core by navigating to **Global Settings > Administrators > Properties > Authentication** tab.

g Click **Test Connection** to validate the credentials that you have entered.

h In the confirmation dialog box, click **OK**.

i Click **Save**.

After you save BMC FootPrints Asset Core server details, BMC Remedyforce creates the **FootPrints Asset Core** category and its sub-categories for events that are received from BMC FootPrints Asset Core. The **FootPrints Asset Core** category contains the following sub-categories:

- Any Category
- Database
- Error in Log File
- Inventory
- Operational Rule
- Performance
- Security
- System
- Windows Application Event
- Windows Events
- Windows Security Event
- Windows System Event

7 To configure the status mapping to track the progress of operational rules, perform the following actions:

When you configure the status mapping, the status of the task is updated depending on the status of the operational rule.

a For each Operational Rule status in the Map Operational Rule Status to Task Status section, click the **Task Status** list.

b In the Select From Status window, select the Task status that maps to the Operational Rule status.

c Repeat step a and step b for each Operational Rule status.

The following table describes the possible statuses of an operational rule.

Status	Description
Approval Rejected	The operational rule could not be deployed because the approver rejected the approval record for the incident or service request that contained the linked task used to deploy the operational rule.
Execution Error	The request to deploy the operation rule could not be successfully completed.
Requested	The operational rule deployment request has been sent to the BMC FootPrints Asset Core server.
Request Error	The BMC FootPrints Asset Core server could not accept the request.

Status	Description
Request Pending	The operational rule deployment request has not been sent to the BMC FootPrints Asset Core server.
Request Successful	The operational rule deployment request was successfully completed.

d Click **Save**.

8 To configure the Asset Core Processor to run the job that retrieves the latest logs and operational rule statuses from BMC FootPrints Asset Core, perform the following actions:

a In the Asset Core Processor section, type the interval when the job should run in the **Hours** and **Minutes** fields.

b Click **Start Asset Core Processor**.

NOTE

BMC recommends that you complete mapping the Operational Rule and Task statuses before starting the processor.

9 *(Optional)* To display the **FootPrints Login ID** field on the User form, perform the following actions:

If you are a valid BMC FootPrints Asset Core administrator and are connecting to BMC FootPrints Asset Core for the first time from BMC Remedyforce, the BMC FootPrints Asset Core Authentication dialog box appears. You must enter your BMC FootPrints Asset Core credentials in this dialog box. Your BMC FootPrints Asset Core user name is saved, and you do not need to enter your credentials for future connection attempts. If your credentials are correct, BMC Remedyforce stores your user name in the **FootPrints Login ID** field of your user record. Navigate to **Setup > Personal Setup > My Personal Information > Personal Information** to view your user record. By default, the **FootPrints Login ID** field does not appear in your user record. You must edit the layout and add the **FootPrints Login ID** field to the layout.

a Navigate to **Setup > App Setup > Customize > Users > Page Layouts**.

b Next to the Remedyforce User page layout, click **Edit**.

c Drag the **FootPrints Login ID** field to the BMC Remedyforce Staff section.

d Click **Save**.

e Click **Page Layout Assignment**.

f In the Page Layout Assignment page, click **Edit Assignment**.

g Select the required profiles in the **Profiles** column.

h From the **Page Layout To Use** list, select the **Remedyforce User** page layout.

i Click **Save**.

1 *(Optional)* To prevent users from editing the BMC FootPrints Asset Core user name in the FootPrints Login ID field of the User object, perform the following actions to enable the **Validate_FootPrints_Login** validation rule:

   a Navigate to **Setup** > **App Setup** > **Customize** > **Users** > **Validation Rules**.

   b Next to the **Validate_FootPrints_Login** validation rule, click **Edit**.

   c Select the **Active** check box.

   d Click **Save**.

2 To allow users to search for and link BMC FootPrints Asset Core devices to incidents in the Incident form and to view the severity of incidents, perform the following actions:

   a Navigate to **Setup** > **App Setup** > **Create** > **Objects** > **Incident**.

   b In the **Label** column, click **Incident**.

   c In the Page Layouts section, click **Edit** next to the page layout that you are using for the Incident object.

   d *(Optional)* To allow users to view the severity of the incidents created for the alerts and events generated from BMC FootPrints Asset Core, drag the **Asset Core Severity** field to the Incident Detail section.

   e Drag the **Link CI** and **CI Actions** buttons to the Incident Detail section.

   f Click **Save**.

Installing SSL certificates on the BMC FootPrints Asset Core server

To secure the transactions and encrypt the information passing between the BMC FootPrints Asset Core server and BMC Remedyforce, you must install a Secure Socket Layer (SSL) certificate on the BMC FootPrints Asset Core server. For more information about SSL, see `http://en.wikipedia.org/wiki/Secure_Sockets_Layer`.

If your organization already has an SSL certificate, you can use it or you can purchase an SSL certificate from an SSL vendor, such as Go Daddy (`http://www.godaddy.com/ssl/ssl-certificates.aspx`) or Symantec (`http://www.symantec.com/theme.jsp?themeid=ssl-information-center`). For more information, see `http://wiki.developerforce.com/page/Outbound_Messaging_SSL_CA_Certificates`.

After preparing the certificate request by creating a private key and Certificate Signing Request (CSR), you must purchase the SSL certificate. When you have purchased the SSL certificate you are ready to install the SSL certificate.

IMPORTANT

You must install a Secure Socket Layer (SSL) certificate for the integration to work.

To install SSL certificates on the BMC FootPrints Asset Core server

1. Launch the BMC FootPrints Asset Core console from BMC Remedyforce from the CMDB Manager.
2. Navigate to **Global Settings > External Integration > Web Service Configuration**.
3. Click the **Properties** toolbar icon.
4. Select the **Enable Web Service** check box.
5. In the **Web Service Port** field, type the number of the port on which the web service should run.
6. In the **Web Service Thread Count** field, type the number of threads that may be handled simultaneously.
7. Click **OK**.
8. To create a private key and CSR, perform the following actions:
   a. Click the **Prepare Certificate Request** toolbar icon.
   b. In the Prepare Certificate Request window, enter the following details:
      - Domain Name
      - Organization
      - Department
      - City
      - State / Province
      - Country
      - Private Key Password
   c. Click **Save Private Key**.
   d. Browse to the location where you want to save the private key.

      BMC recommends that you save the private key in the same folder where you have saved the SSL certificate.
   e. Click **Save**.
   f. In the Prepare Certificate Request window, click **Save CSR**.
   g. Browse to the location where you want to save the CSR.

      BMC recommends that you save the CSR in the same folder where you have saved the SSL certificate and the private key.
   h. Click **Save**.
   i. Click **Close**.
9. Provide the private key and CSR to an SSL vendor and purchase the SSL certificate from the vendor.
10. Click **Install the certificate**.
11. In the **Give a name to your certificate** field, type the name of your certificate.

12 In the Root Certificate section, click **Browse** to browse to the location where the root certificate is located, and open the root certificate file.

Some certificate providers might give you the root and intermediate certificates in one file. You can verify if you have added the correct certificate by clicking **Details** and viewing the content of the certificate. A root authority is self-signed. Therefore, the **Issuer** and **Subject** fields must have the same value.

If both certificates are present in one file, delete the content from the **-----BEGIN CERTIFICATE-----** to the **-----END CERTIFICATE-----** markers for the first certificate. Click **Details** and verify that the **Issuer** and **Subject** fields have the same value. If the **Issuer** and **Subject** fields have different values, delete the entire content and again open the root certificate file. Now, delete the content from the **-----BEGIN CERTIFICATE-----** to the **-----END CERTIFICATE-----** markers for the second certificate. Click **Details** and verify that the **Issuer** and **Subject** fields have the same value.

13 Click **Close**.

14 In the Intermediate Certificate section, click **Browse** to browse to the location where the intermediate certificate is located, and open the intermediate certificate file.

If both certificates are present in one file, delete the content from the **-----BEGIN CERTIFICATE-----** to the **-----END CERTIFICATE-----** markers for the first certificate. Click **Details** and verify that the **Issuer** and **Subject** fields have different values. If the **Issuer** and **Subject** fields have the same values, delete the entire content and again open the intermediate certificate file. Now, delete the content from the **-----BEGIN CERTIFICATE-----** to the **-----END CERTIFICATE-----** markers for the second certificate. Click **Details** and verify that the **Issuer** and **Subject** fields have different values.

15 In the Final Certificate section, click **Browse** to browse to the location where the final certificate is located, and open the final certificate file.

16 To view the final certificate, click **Details**.

17 Click **Close**.

18 In the Final Certificate section, click **Browse** to browse to the location where the private key is located, and open the private key file.

You can verify that the private is added by checking for the **-----BEGIN RSA PRIVATE KEY-----** and **-----END RSA PRIVATE KEY-----** markers.

19 In the **Private Key Password** field, type the private key password you had entered in while creating the private key.

20 Click **Install Certificates**.

21 In the confirmation dialog box, click **Close**.

22 In the Install Certificate window, click **Close**.

23 Click **Refresh**.

The SSL certificate is installed on the BMC FootPrints Asset Core server. The SSL certificate appears in the **Web Service SSL Certificate File** attribute.

Collecting feedback through an email survey

If you want your clients to provide feedback on the service after their incident or service request is closed, you must configure the following workflows to send an email message with a link to a survey about the service:

- Notify the client when a service request is closed
- Notify the client when an incident is closed

Clients can click the survey link in the email message and provide their feedback. BMC Remedyforce uses the following email templates to send the email messages to clients when their incident or service request is closed:

- Email Template for submitting feedback when incident is closed
- Email Template for submitting feedback when service request is closed

You must update these email templates to use the URL of the Force.com site that you have configured for your clients.

The following steps provide an overview of how to collect feedback through an email survey:

Step 1 Copy the URL of the Force.com site where you want to host the Feedback Survey Visualforce page and paste the URL in a Notepad file.

Step 2 Update the required email templates to use the URL of the Force.com site.

Step 3 Assign the updated email templates to the required workflows.

Step 4 Make the Feedback Survey Visualforce page accessible to the Force.com site.

▶ To collect feedback through an email survey

1 Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **App Setup** > **Develop** > **Sites**.

3 If you have configured Self Service for BMC Remedyforce, copy the URL of the BMC Remedyforce Self Service site and paste it in a Notepad file.

4 If you have not set up a Force.com site on your organization, perform the following actions:

   a Navigate to **Setup** > **App Setup** > **Develop** > **Sites**.

   b In the Sites page, type the domain that you want to associate with the site.

   c Click **Check Availability**.

   If the domain is available, the following message appears:

`Success: The Force.com domain name "<domain>-force.com" is available.`

d Select the **I have read and accepted the Force.com Sites Terms of Use** check box.

e Click **Register My Force.com Domain**.

NOTE

You cannot modify the domain name after you complete the registration process.

f In the confirmation dialog box, click **OK**.

g In the Sites (<*domain name*>) section, click **New**.

h In the **Site Label** field, type the display label of this site.

i In the **Site Name** field, type the name of this site.

j In the **Site Description** field, type the description of this site.

By default, your name is populated in the **Site Contact** field.

k Select the **Active** check box.

l In the **Active Site Home Page** and **Inactive Site Home Page** fields, ensure that `SSSiteLogin` and `InMaintenance` are entered.

m In the **Site Template** field, type `SiteTemplate`.

n Select the **Enable Feeds** check box.

o Click **Save**.

p Copy the URL of the site and paste it in a Notepad file.

5 If you have a Force.com site and want to use the site to host the BMC Remedyforce Feedback Survey Visualforce page, perform the following actions:

a Navigate to **Setup** > **App Setup** > **Develop** > **Sites**.

b Copy the URL of the site and paste it in a Notepad file.

6 Navigate to **Setup** > **Administration Setup** > **Communication Templates** > **Email Templates**.

7 From the **Folder** list, select **BMC Remedyforce Emails**.

8 In the **Email Template Name** column, click **Email Template for submitting feedback when incident is closed**.

9 To view the Visualforce code for this template, click **Edit Template** in the Email Template section.

NOTE

BMC recommends that you save a copy of the existing Visualforce code for this template before you make updates to the code.

10 Replace **Click <a href="http://examplesite-enterprise-edition.ap1.force.com/apex/BMCServiceDesk__FeedbackSurveyPage?sid={!relatedto.id}&lang={!relatedto.FKClient__r.LocaleSidKey}">** with= **Click <a href="<*URL of the site*>/apex/BMCServiceDesk__FeedbackSurveyPage?sid={!relatedto.id}&lang={!relatedto.FKClient__r.LocaleSidKey}">**.

Before the update	After the update
Click <a href="**http://examplesite-enterprise-edition.ap1.force.com**/apex/BMCServiceDesk__FeedbackSurveyPage?sid={!relatedto.id}&lang={!relatedto.FKClient__r.LocaleSidKey}">	Click <a href="**<*URL of the site*>**/apex/BMCServiceDesk__FeedbackSurveyPage?sid={!relatedto.id}&lang={!relatedto.FKClient__r.LocaleSidKey}">

11 Click **Save**.

12 Navigate to **Setup > Administration Setup > Communication Templates > Email Templates**.

13 From the **Folder** list, select **BMC Remedyforce Emails**.

14 In the **Email Template Name** column, click **Email Template for submitting feedback when service request is closed**.

15 Repeat step 9 through step 11.

16 To assign the **Email Template for submitting feedback when incident is closed** email template to the **Notify the client when an incident is closed** workflow rule, perform the following actions:

a Navigate to **Setup > App Setup > Create > Workflows and Approvals > Workflow Rules**.

b In the **Rule Name** column, click the **Notify the client when task is closed** workflow rule.

c Click on **Activate**.

d In the Workflow Actions section, click **Edit**.

e From the **Add Workflow Action** list, select **Select Existing Action**.

f From the **Choose Action Type** list, select the **Email Alert** type of action.

g In the **Available Actions** list, select **Email Alert notify_client_when_incident_is_closed**.

h To move the selected action from the **Available Actions** list to the **Selected Actions** list, click the right arrow.

i Click **Save**.

j In the Immediate Workflow Actions section, click **notify_client_when_incident_is_closed**.

k In the Email Alert Detail section, click **Edit**.

l To configure this workflow to use the **Email Template for submitting feedback when incident is closed** email template, click the **Email Template** lookup.

   This workflow currently uses the **Incident Email Template 6 Version 2.0** email template.

m Select the **Email Template for submitting feedback when incident is closed** email template.

n Click **Save**.

17 To assign the **Email Template for submitting feedback when service request is closed** email template to the **Notify the client when a service request is closed** workflow rule, perform the following actions:

   a Navigate to **Setup** > **App Setup** > **Create** > **Workflows and Approvals** > **Workflow Rules**.

   b In the **Rule Name** column, click the **Notify the client when service request is closed** workflow rule.

   c If the **notify_client_when_service_request_is_closed** email alert is present in the Immediate Workflow Actions section, proceed to step k.

   d Click **Activate**.

   e In the Workflow Actions section, click **Edit**.

   f From the **Add Workflow Action** list, select **Select Existing Action**.

   g From the **Choose Action Type** list, select the **Email Alert** type of action.

   h In the **Available Actions** list, select **Email Alert notify_client_when_service_request_is_closed**.

   i To move the selected action from the **Available Actions** list to the **Selected Actions** list, click the right arrow.

   j Click **Save**.

   k In the Immediate Workflow Actions section, click **notify_client_when_service_request_is_closed**.

   l In the Email Alert Detail section, click **Edit**.

   m To configure this workflow to use the **Email Template for submitting feedback when service request is closed** email template, click the **Email Template** lookup.

   This workflow currently uses the **Service Request Closed** email template.

   n Select the **Email Template for submitting feedback when service request is closed** email template.

   o Click **Save**.

18 To make the Feedback Survey Visualforce page accessible to your Force.com site, perform the following actions:

   a Navigate to **Setup** > **App Setup** > **Develop** > **Sites**.

   b In the **Site Label** column, click the label of the site.

c In the Site Visualforce Pages section, click **Edit**.

d In the **Available Visualforce Pages** list, select **BMCServiceDesk.FeedbackSurveyPage**.

e To move the selected Visualforce page from the **Available Visualforce Pages** list to the **Enabled Visualforce Pages** list, click the right arrow.

f Click **Save**.

Allowing users to enter workarounds for problems

If you want users to be able to enter a workaround for a problem without designating the problem as a known error, you must disable the **KnownErrorMustBeCheckedForWorkaround** validation rule for the Problem object.

▶ To allow users to enter workarounds for problems

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2. Navigate to **Setup** > **App Setup** > **Create** > **Objects**.
3. In the Custom Objects page, click **Problem**.
4. In the Validation Rules section, click the **KnownErrorMustBeCheckedForWorkaround** validation rule.
5. Click **Edit**.
6. Clear the **Active** check box.

   If you are installing version 20.12.02.017.008 on a new Salesforce organization, the **Active** check box is cleared.

7. Click **Save**.

Enabling the Auditing feature for configuration items

To use the Auditing feature for configuration items, you must enable history tracking for the Base Element object.

▶ To enable the Auditing feature for configuration items

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2 Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

3 In the Custom Objects page, click **Base Element**.

4 Click **Edit**.

5 In the Optional Features section, select the **Track Field History** check box.

6 Click **Save**.

7 In the Custom Fields & Relationships section, click **Set History Tracking**.

8 In the Track old and new values section, select the **Record Update Count** field.

9 *(Optional)* Enable field history tracking for additional fields.

You can enable field history tracking for a maximum of 20 fields.

10 Click **Save**.

BMC Remedyforce displays the auditing data in the **Auditing** tab of the Supporting Information section. The data is recorded from the current date and time and displayed in this tab. Previous changes are not recorded.

Enabling enhanced lookups

Enhanced lookups allow users to use wildcards in their lookups and sort, filter, and page through search results. For more information, see https://help.salesforce.com/HTViewHelpDoc?id=search_lookupdialog.htm&language=en_US.

You must enable enhanced lookups on the required custom objects for users to use this feature in a Lookup Search dialog box.

▶ To enable enhanced lookups

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2 Navigate to **Setup** > **App Setup** > **Customize** > **Search** > **Search Settings**.

3 In the Number of Search Results Displayed Per Object section, select the objects for which you want to update the number of records displayed on the Search Results page.

4 In **Results per page for selected objects** field, enter the number of records to be displayed on the Search Results page.

5 In the Lookup Settings section, select the check box in the **Enhanced Lookups** column for the following custom objects:

- Actions
- Base Elements
- Broadcasts
- Categories
- Category Types
- Impacts
- Request Definitions
- Status
- Urgencies

6 Click **Save**.

Making statuses available to problems

If you are installing BMC Remedyforce version 20.12.02.017.008 on a new Salesforce organization, the following statuses are available when you are creating problems:

- ACCEPTED
- IN PROGRESS
- REJECTED
- WAITING FOR

If you are upgrading to BMC Remedyforce version 20.12.02.017.008 and want to make these statuses available while creating problems, you must edit these statuses and make them available to problems.

▶ To make statuses available to problems

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Remedyforce Administration > Status**.

3 Click **<*Status Name*>**.

4 In the Applies To section, select the **Problems** check boxes.

5 Click **Save**.

6 Perform step 3 through step 5 for the following statuses:

- ACCEPTED
- IN PROGRESS
- REJECTED
- WAITING FOR

Creating the Needs Update option for feedback on knowledge article

While searching knowledge, staff members can select the **Needs Update** option as a rating of a knowledge article. When a staff member selects this option and provides a feedback, a change request is created with the feeback text saved as the description of the change request.

Staff members can select this option if the knowledge article that they have seen needs to be updated.

▶ To make the Needs Update option available

1. Navigate to **Setup > App Setup > Create > Objects**.
2. Click **Knowledge Feedback**.
3. In the **Custom Fields & Relationship** section, click **Rating**.
4. On the **Rating** page, in the **Picklist Values** section, click **New**.
5. On the **Add Picklist Values** page, type **Needs Update**, and click **Save**.

A Registering at the BMC Communities website

You must register at the BMC Communities website to download the files that are uploaded for you.

▶ To register at the BMC Communities website

1. Open `https://communities.bmc.com`.
2. Click **Register**.
3. Enter your email address.

   A confirmation email from BMC Communities is sent to your email address that contains a link to the registration page.
4. From the email that you received from BMC Communities, click the link to validate your email address.

   You can also copy and paste the link to your browser. The Email Validation Successful page is displayed.
5. Click **Create your account and profile**.
6. On the Registration: Create your account page, enter the required information and click **Next**.
7. On the Registration: Invite Others page, click the **No thanks, I'm finished** link.
8. On the You've finished setting up your account page, click **Go to your home page**.
9. On the BMC Communities home page, click **Browse** and select **Communities**.
10. In the search text box, type **BMC Remedyforce** and click the **BMC Remedyforce Service Desk community** link.
11. On the BMC Remedyforce Service Desk page, click the Documents tab.
12. Click **Filter by Categories & Tags**.
13. Select **Technical Documents**.
14. Download the BMC Remedyforce `BMC Remedyforce HelpText Upgrade SE.exe` file to your local computer.

B Upgrading from version 20.11.03.007

This section describes how to upgrade from BMC Remedyforce version 20.11.03.007.

The following topics are provided:

- Configuration changes to be performed (page 114)
- Enabling the features released in version 20.12.01.009 (page 122)

Configuration changes to be performed

If you are upgrading from version 20.11.03.007, you must perform these configuration changes in addition to the configuration changes made to upgrade to version 20.12.02.017.008.

▶ To upgrade from version 20.11.03.007

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2. If you have not installed BMC Remedyforce version 20.12.02.017.008, perform the installation.

   For more information, see “Installing the managed package” on page 11.

3. To allow users to select **Picklist** as the type of Input field for service request definitions, perform the following actions:
   a. Navigate to **Setup** > **App Setup** > **Create** > **Objects**.
   b. In the **Label** column, click **Fulfillment Input**.
   c. In the **Field Label** column of the Custom Fields & Relationships section, click **Response Type**.
   d. In the Picklist Values section, click **New**.
   e. To create a new picklist value for the **Response Type** field, type `Picklist` in the field.
   f. Click **Save**.

4. To allow users to select **Item** as a cost option for service request definitions, perform the following actions:
   a. Navigate to **Setup** > **App Setup** > **Create** > **Objects**.
   b. In the **Label** column, click **Request Definition**.
   c. In the **Field Label** column of the Custom Fields & Relationships section, click **Cost Option1**.
   d. In the Picklist Values section, click **New**.
   e. To create a new picklist value for the **Cost Option1** field, type `Item` in the field.
   f. Click **Save**.

5. To allow users to select **Item** as a price option for service request definitions, perform the following actions:
   a. Navigate to **Setup** > **App Setup** > **Create** > **Objects**.
   b. In the **Label** column, click **Request Definition**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **Price Option1**.

d In the Picklist Values section, click **New**.

e To create a new picklist value for the **Price Option1** field, type `Item` in the field.

f Click **Save**.

6 To allow users to select **Service-SubService** as the impact direction of a relationship between two services and **Service-Offering** as the impact direction of a relationship between a service and its service offering, perform the following actions:

a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

b In the **Label** column, click **Base Relationship**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **Impact Direction**.

d In the Picklist Values section, click **New**.

e To create a new picklist value for the **Impact Direction** field, type `Service-SubService` in the field.

f Click **Save**.

g To create a new picklist value for the **Impact Direction** field, type `Service-Offering` in the field.

h Click **Save**.

7 To allow users to select **Offering** as the type of business service and **Published** and **Unpublished** as the types of Stage, perform the following actions:

a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

b In the **Label** column, click **Business Service**.

c In the **Field Label** column of the Custom Fields & Relationships section, click **Service Type**.

d In the Picklist Values section, click **New**.

e To create a new picklist value for the **Service Type** field, type `Offering` in the field.

f Click **Save**.

g In the upper left section, click the **Back to Business Service** link.

h In the **Field Label** column of the Custom Fields & Relationships section, click **Stage**.

i In the Picklist Values section, click **New**.

j To create a new picklist value for the **Stage** field, type **Published** in the field.

k Click **Save**.

l To create a new picklist value for the **Stage** field, type **Unpublished** in the field.

m Click **Save**.

8 To allow users to create templates for service request definitions, perform the following actions:

   a Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

   b In the **Label** column, click **Template**.

   c In the **Field Label** column of the Custom Fields & Relationships section, click **Template For**.

   d In the Picklist Values section, click **New**.

   e To create a new picklist value for the **Template For** field, type `Request Detail` in the field.

   f Click **Save**.

9 To enable Visualforce pages for the ServiceDesk Client profile, perform the following actions:

   a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

   A list of all profiles in your Salesforce.com organization is displayed.

   b In the **Profile Name** column, click the **ServiceDesk Client** profile.

   c In the Enabled Visualforce Page Access section, click **Edit**.

   d To make the Visualforce pages accessible in addition to the list of pages already enabled, in the **Available Visualforce Pages** list, select the following Visualforce pages:

   - **BMCServiceDesk.KM_ArticleView**
   - **BMCServiceDesk.KM_PopularArticles**
   - **BMCServiceDesk.KM_PreviewArticle**
   - **BMCServiceDesk.SSCategoryGroupingPage**
   - **BMCServiceDesk.SSMyCartWidgetPage**

e To move the selected Visualforce pages from the **Available Visualforce Pages** list to the **Enabled Visualforce Pages** list, click the right arrow.

The **Enabled Visualforce Pages** list must contain the following Visualforce pages after you perform step e:

BMCServiceDesk.FileDownloadPage	BMCServiceDesk.SelfServiceHome
BMCServiceDesk.KM_ArticleView	BMCServiceDesk.SelfServiceSettingsCollection
BMCServiceDesk.KM_PopularArticles	BMCServiceDesk.SSAttachmentUploadComplete
BMCServiceDesk.KM_PreviewArticle	BMCServiceDesk.SSCategorySearchPage
BMCServiceDesk.SDEHome	BMCServiceDesk.SelfServicePopularRequest
BMCServiceDesk.SearchPage	BMCServiceDesk.SSContactUs
BMCServiceDesk.SSBroadcastWidgetPage	BMCServiceDesk.SSFetchMobileConfig
BMCServiceDesk.SSCategoryGroupingPage	BMCServiceDesk.SSIncident
BMCServiceDesk.SSChangePassword	BMCServiceDesk.SSIncidentCustom
BMCServiceDesk.SSDocumentationPage	BMCServiceDesk.SSMyCartWidgetPage
BMCServiceDesk.SSForgotLoginInfo	BMCServiceDesk.SSMyHelpRequests
BMCServiceDesk.SSIncidentActionData	BMCServiceDesk.SSQuickLinksPopup
BMCServiceDesk.SSIncidentStatus	BMCServiceDesk.SSRedirect
BMCServiceDesk.SSMyProfile	BMCServiceDesk.SSSearchPortletPage
BMCServiceDesk.SSQuickLinksWidget	BMCServiceDesk.SSSiteRegister
BMCServiceDesk.SSSearchPage	BMCServiceDesk.SSUserTemplate
BMCServiceDesk.SSSiteLogin	BMCServiceDesk.SelfServiceCommonQA
BMCServiceDesk.SSTickerPage	

f Click **Save**.

g Repeat step a through step f for the following profiles:

- ServiceDesk Staff
- ServiceDesk Change Manager
- Profiles where you have configured the **ServiceDesk Change Manager**, **ServiceDesk Client**, and **ServiceDesk Staff** levels of access when you installed the managed package.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=distribution_installing_packages.htm&loc=help&hash=topic-title`.

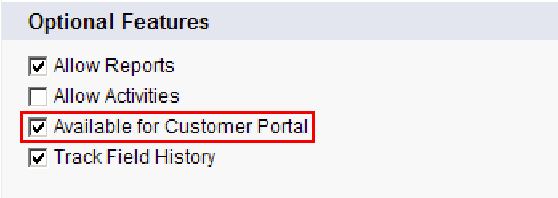
10 To make the <*custom object name*> available to the Customer Portal, perform the following actions:

a Navigate to **Setup > App Setup > Create > Objects**.

b In the Custom Objects page, click **<*custom object name*>**.

c Click **Edit**.

d In the Optional Features section, select the **Available for Customer Portal** check box.



e Click **Save**.

11 Ensure that the **Available for Customer Portal** check box is selected for the following objects:

- Agreement
- Agreement History
- Base Element
- Broadcast
- Broadcast Account Link
- Business Service
- Category
- Change Assessment
- Change History
- Change Request
- Change Request Service Target
- CI Client Link
- Configuration Item History
- Custom Action
- CustomAttachment
- Entitlement
- FAQ
- FAQ Category
- Fulfillment Input
- Fulfillment Mapping
- Impact
- Incident
- Incident History
- Incident Service Target
- Knowledge Article
- Knowledge Article Viewed
- Knowledge Feedback
- Knowledge Incident Link
- Popups
- Process Control
- QuickLink
- Request Definition
- Request Detail
- Request Detail Inputs
- SelfService Image
- SelfService Theme
- Service Target
- Service Target Criteria
- SLA Milestone
- SLA Milestone Action
- SLA Milestone Change Transaction
- SLA Milestone Incident Transaction
- SLA Relation
- Status
- Task
- Urgency

12 To grant the required permissions to the ServiceDesk Client profile for custom objects, perform the following actions:

a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.

b In the **Profile Name** column, click the **ServiceDesk Client** profile.

c In the Profile Detail section, click **Edit**.

d Ensure that the **Read** check box is selected for the following custom objects:

- Agreements
- Agreement Histories
- Base Elements
- Broadcasts
- Broadcast Account Link
- Business Services
- Categories
- Change Assessments
- Change Histories
- Change Requests
- CI Client Link
- Configuration Item Histories
- Custom Actions
- Entitlements
- FAQs
- FAQ Categories
- Fulfillment Inputs
- Fulfillment Mappings
- Impacts
- Incident Histories
- Knowledge Articles
- SYSPopupObject
- Process Controls
- Request Definitions
- SelfService Images
- SelfService Themes
- Service Targets
- Service Target Criteria
- SLA Milestones
- SLA Milestone Actions
- SLA Relations
- Status
- Urgencies

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Agreements	✓					
Agreement Histories	✓					
Base Elements	✓					
Broadcasts	✓					
Broadcast Account Link	✓					
Business Services	✓					
Categories	✓					
Change Requests	✓					
Change Request Service Targets	✓	✓	✓			
CI Client Link	✓					
Configuration Item Histories	✓					
Custom Actions	✓					
CustomAttachment	✓	✓				
Entitlements	✓					
FAQs	✓					
FAQ Categories	✓					
Fulfillment Inputs	✓					
Fulfillment Mappings	✓					
Impacts	✓					
Incidents	✓	✓	✓			
Incident Histories	✓					
Incident Service Targets	✓	✓	✓			

	Basic Access			
	Read	Create	Edit	Delete
Knowledge Articles	✓			
Knowledge Articles Viewed	✓	✓	✓	✓
Knowledge Feedback	✓	✓	✓	
Knowledge Incident Links	✓	✓	✓	
SYSPopupObject	✓			
Process Controls	✓			
QuickLinks	✓	✓		
Request Definitions	✓			
Request Details	✓	✓	✓	
Request Detail Inputs	✓	✓	✓	
SelfService Images	✓			
SelfService Themes	✓			
Service Targets	✓			
Service Target Criteria	✓			
SLA Milestones	✓			
SLA Milestone Actions	✓			
SLA Milestone Change Transactions	✓	✓	✓	
SLA Milestone Incident Transactions	✓	✓	✓	
SLA Relations	✓			
Status	✓			
Tasks	✓	✓		
Urgencies	✓			

e Ensure that the **Read** and **Create** check boxes are selected for the following custom objects:

- CustomAttachment
- Quick Links
- Tasks

f Ensure that the **Read**, **Create**, and **Edit** check boxes are selected for the following custom objects:

- Change Request Service Targets
- Incidents
- Incident Service Targets
- Knowledge Feedback
- Knowledge Incident Links
- Request Details
- Request Detail Inputs
- SLA Milestone Change Transactions
- SLA Milestone Incident Transactions

g Ensure that the **Read**, **Create**, **Edit,** and **Delete** check boxes are selected for the Knowledge Articles Viewed custom object.

h Repeat step a through step f for the profiles where you have configured the **ServiceDesk Client** level of access when you installed the managed package.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=distribution_installing_packages.htm&loc=help&hash=topic-title`.

13 To configure the field-level security to display the fields to Self Service clients, perform the following actions:

a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.

b In the **Profile Name** column, click the **ServiceDesk Client** profile.

c In the Field-Level Security section for the Incident object, click the **View** link.

d Click **Edit**.

e Ensure that the **Visible** check box is selected for the following fields:

- Account
- Category
- Client Email
- Closed Date
- Configuration Item
- Contact Type
- Description
- Feedback
- First Name
- Impact
- Impact~
- Last Name
- Opened Date
- Resolution
- Status
- Status~
- Service
- Service Offering
- Urgency
- Urgency~

f Click **Save**.

g Click **Back to Profile**.

h Repeat step c through step g for the following objects:

- Incident
- Incident History

i Repeat step a through step h for the profiles where you have configured the **ServiceDesk Client** level of access when you installed the managed package.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=distribution_installing_packages.htm&loc=help&hash=topic-title.

14 To view the details of the Actions performed on an incident in Self Service, perform the following actions:

These Actions are available in the Actions Performed tab of the Additional Information section.

a Navigate to **Setup** > **Administration Setup** > **Manage Users** > **Profiles**.

A list of all profiles in your Salesforce.com organization is displayed.

b In the **Profile Name** column, click the **ServiceDesk Client** profile.

c In the Field-Level Security section for the Incident History object, click the **View** link.

d Click **Edit**.

e Ensure that the **Visible** check box is selected for the following fields:

- Action
- Action~
- Action Duration
- Created By
- Date & Time
- Description
- Duration
- Inactive
- Incident
- Incident#
- Incident History ID
- Last Modified By
- Note
- Staff ID
- Staff ID~
- System

f Click **Save**.

g Repeat step a through step f for the profiles where you have configured the **ServiceDesk Client** level of access when you installed the managed package.

For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=distribution_installing_packages.htm&loc=help&hash=topic-title.

Enabling the features released in version 20.12.01.009

To use the features released in version 20.12.01.009, you must to set up and configure these features:

- "Adding tabs to the application" on page 122
- "Assigning the Remedyforce User layout to profiles" on page 124
- "Updating the User Search layout to display details of the staff member" on page 124
- "Enabling help documents for Salesforce page layouts" on page 125
- "Adding images to tabs" on page 126
- "Enabling viewing of knowledge articles in Self Service" on page 127

Adding tabs to the application

BMC Remedyforce can be viewed in Salesforce page layouts in a tabbed view. You must add these tabs after upgrade to use the tabbed view.

▶ To add tabs to the application

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2. Navigate to **Setup> App Setup** > **Create** > **Apps**.
3. In the **Action** column beside **BMC Remedyforce**, click **Edit**.
4. In the **Choose the Image Source for the Custom App Logo** section, click **Insert an Image**.
5. From the **File Location** list, select **BMC Remedyforce Images**.
6. Click **remedyforce-standard-logo.gif**.

   If search results do not list the image file, click **Search in Documents**.

7 In the **Choose the Tabs** section, from the **Available Tabs** list, select the following tabs:

- Remedyforce Dashboards
- Incidents
- Tasks
- Broadcasts
- Problems
- Change Requests
- Releases
- Knowledge Articles
- Remedyforce Administration
- Remedyforce Workspaces
- Remedyforce CMDB
- Remedyforce Self Service
- BMC Remedyforce Home

8 To move the selected tabs to the **Selected Tabs** list, click the right arrow.

9 To make the Dashboard tab as the landing tab of the application, from the **Default Landing Tab** list, select **Dashboard**.

10 Select the **Overwrite user's personal custom app customizations** check box.

11 Click **Save**.

12 After logging on, you might see **Setup** as the default landing tab in some cases even when you have selected **BMC Remedyforce** from the **Force.com App Menu** in the upper right section. To use the **Dashboards** tab as the default landing tab, perform the following actions:

a Navigate to **Personal Setup > My Personal Information > Personal Information**.

b Click **Edit**.

c Clear the **Make Setup My Default Landing Page** check box.

d Click **Save**.

Assigning the Remedyforce User layout to profiles

To use the latest user layout on forms, you must assign the Remedyforce User layout to the required profiles.

▶ To assign the Remedyforce User layout to profiles

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2. Navigate to **Setup** > **App Setup** > **Customize** > **Users** > **Page Layouts**.
3. Click **Page layout Assignment**.
4. Click **Edit Assignment**.
5. From the **Page Layout To Use** list, select **Remedyforce User**.
6. Select the required profiles.
7. Click **Save**.

IMPORTANT

The **Account Name** field is read-only in the layout, but the field can still be edited by system administrators. BMC recommends that the system administrators must not edit this field. This field is populated when you create or update a client record.

Updating the User Search layout to display details of the staff member

To display the required details of the staff member in the lookup windows, you must update the User Search layout.

▶ To update the User Search layout to display details of the staff member

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title.

2. Navigate to **Setup** > **App Setup** > **Customize** > **Users** > **Search Layouts**.
3. In the Search Layouts section, click **Edit** in the **Action** column beside **Lookup Dialogs**.

4 From the **Available Fields** list, select the following fields:
   - Full Name
   - Last Name
   - First Name
   - Phone
   - Account
   - Profile
   - Username
   - Email
   - Out of Office
   - Account Name

5 Click the right arrow to move the selected fields to the **Selected Fields** list.

6 Click **Save**.

Enabling help documents for Salesforce page layouts

You must manually add links to the help documents for Salesforce page layouts after upgrade.

To enable help documents for Salesforce page layouts

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **App Setup** > **Create** > **Objects**.

3 In the **Action** column beside the required object for which you want to add the help link, click **Edit**.

4 In the **Context-Sensitive Help Setting** field, select **Open a window using a Visualforce page**.

5 Select the help page for the required object and click **Save**.

6 Repeat step 3 to step 5 for all the objects mentioned in the following table.

The following table provides you the list of objects for which you must add the help file links and the corresponding help pages:

Object	Help page
Incident	StdFormHelpIncident
Incident History	StdFormHelpIncidentHistory
Task	StdFormHelpTask
Incident CI Link	StdFormHelpCommonLink
Incident Change Link	StdFormHelpCommonLink
Incident Problem Link	StdFormHelpCommonLink
Task History	StdFormHelpTaskHistory
Task CI Link	StdFormHelpCommonLink
Broadcast	StdFormHelpBroadcast
Broadcast History	StdFormHelpBroadcastHistory
Change Request	StdFormHelpChange
Change History	StdFormHelpChangeHistory
Change Problem Link	StdFormHelpCommonLink
Change CI Link	StdFormHelpCommonLink
Change Assessment	StdFormHelpChangeAssessment
Problem	StdFormHelpProblem
Problem History	StdFormHelpProblemHistory
Problem CI Link	StdFormHelpCommonLink
Knowledge Article	StdFormHelpRFKnowledge

Adding images to tabs

BMC Remedyforce provides images with the tabs. However, after upgrade these images are not displayed. This is an optional procedure. You must perform these steps if you want to show images with the tab names on the home page of these tabs.

▶ To add images to tabs

1 Log on to your Salesforce.com organization as a user with administrative permissions.

For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.

2 Navigate to **Setup** > **App Setup** > **Create** > **Tabs**.

3. In the **Action** column beside **Incidents**, click **Edit**.
4. In the **Tab Style** field, click .
5. Click **Create your own style**.
6. Select the required color and icon image and click **OK**.

   The default color assigned to all the objects is available in the fifth row, eighth column. The following are the default icon images assigned to different tabs:

   - Incidents: StdIncident
   - Broadcasts: StdBroadcast
   - Change Requests: StdChangeRequest
   - Problems: StdProblem
   - Tasks: StdTask

   These image files are available in the **BMC Remedyforce Images** folder.
7. Repeat step 3 to step 6 for the **Broadcasts**, **Tasks**, **Change Requests**, and **Problems** tabs.

Enabling viewing of knowledge articles in Self Service

After you upgrade, you must enable KM_PreviewArticle Visualforce page for the ServiceDesk client profiles. This step enables Self Service users to view the BMC Remedyforce knowledge articles in Self Service.

▶ To enable viewing of knowledge articles in Self Service

1. Log on to your Salesforce.com organization as a user with administrative permissions.

   For more information, see `https://na11.salesforce.com/help/doc/user_ed.jsp?section=help&target=admin_userperms.htm&loc=help&hash=topic-title`.
2. Navigate to **Setup > Administration Setup > Manage Users > Profiles**.
3. Click the ServiceDesk Client profile.

   In this step, click the profile that you have created for the Self Service clients.
4. In the **Enable Visualforce Page Access** section, click **Edit**.
5. From the **Available Visualforce Pages** list, select **KM_PreviewArticle** and click the right arrow to move the selected page to the **Enabled Visualforce Pages** list.
6. Click **Save**.

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------------------ Exhibits ------------------

Exhibit A: Description of Software Product
FusionCharts v3 Site License, in source or object form, including all project files, SWF files and pertinent documentation, examples codes and demo applications.

Exhibit B: Upgrades
As a part of this Agreement, InfoSoft will provide free upgrades of FusionCharts Software v3.x and v4.0 to you, at no additional cost as soon as they are made available to other customers of InfoSoft.

Exhibit C: Support
InfoSoft offers two types of support:
- Self-serve Support: This support is available online on FusionCharts Software website (www.fusioncharts.com) and includes articles, tips and documentation on how to use FusionCharts Software. You can access this support option through our Knowledge Base (KB), Community Forums and Documentation hosted on our website 365 / 24 / 7. There may be short periods of downtime due to maintenance and possible internet outage. InfoSoft offers self-serve support 'as-is' and does not guarantee any specific level of uptime or warranty of any kind.

- Live Technical Support: Technical support will be provided by InfoSoft Support Staff via telephone and email. Live Technical Support is available to InfoSoft customers with active support subscription period as part of their license, or as a result of purchase of additional support subscription for the duration of the period of subscription. InfoSoft Support Staff will provide support to FusionCharts Software licensees only, and not their end customers. InfoSoft will support only those products released within the last calendar year. At its discretion, it can provide free upgrades to the latest version of FusionCharts Software to help resolve any problem. InfoSoft Support Staff will provide support only on FusionCharts Software, thereby not extending to technologies or products in whose conjunction the licensee is using FusionCharts Software.

Support hours are IST 10.00am to 6.30pm (IST = +5.30 GMT), Monday to Friday excluding statutory holidays and company holidays. Official support email is support@fusioncharts.com.

The procedure for getting support is:
- You send an email with details of your technical problem to support@fusioncharts.com
- The support system will assign your ticket a unique ID using which you will refer to the ticket
- The ticket is then reviewed and analyzed by InfoSoft Support Staff and any further information is requested based on the nature of problem
- InfoSoft Support Staff will then give you an answer based on their understanding of the problem. If that answer is not satisfactory, you can revert to the Staff with additional details of the problem.
- If InfoSoft Support Staff determines that the support ticket is of a complex nature involving any coding, or it entails a bug fix, it will escalate the ticket to InfoSoft Development team for resolution.
- InfoSoft Development team, in tandem with the Support Staff, will finally reply and help you resolve the problem
- If the query still remains unresolved and / or you are unsatisfied with the response quality or time, you can send an email to cto@fusioncharts.com for further remedy

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