Release Notes

BMC Remedyforce

Version 20.12.02.017.008
December 2012

BMC Software is releasing version 20.12.02.017.008 of the BMC Remedyforce product. These release notes supplement the product documentation and describe an overview of the product, supported browsers, how to install the managed package, known issues, and support information for this version.

The following topics are provided:

410372

BMC Remedyforce overview

BMC Remedyforce is designed to meet your business requirements by automating your service desk processes and lowering the cost of support operations. BMC Remedyforce is a cloud-enabled service desk with an easy-to-use interface that suits the service needs of many departments.

What's new?

This section briefly describes the new features that are available in BMC Remedyforce 20.12.02.017.008. This section incorporates the following new features since the previous release of BMC Remedyforce:

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Integrating BMC Remedyforce with BMC FootPrints Asset Core

BMC FootPrints Asset Core is an advanced systems management software that provides a reliable way to monitor all systems on a network. It isolates the exact point of failure when problems occur and makes it possible for network and system difficulties to be resolved quickly. For more information, see `http://www.numarasoftware.com/footprints`.

When BMC Remedyforce and BMC FootPrints Asset Core are integrated, the staff members can perform the following actions:

- Launch the BMC FootPrints Asset Core console from BMC Remedyforce from the CMDB Manager. You are prompted to provide your credentials for the first log-on attempt. You are not prompted for credentials in future log-on attempts.
- View the asset summary of devices imported from BMC FootPrints Asset Core.
- Perform BMC FootPrints Asset Core actions on the BMC FootPrints Asset Core device in BMC Remedyforce.
- Create service request definitions and Incident templates that deploy operational rules and make them available to Self Service clients.
- Attach BMC FootPrints Asset Core operational rules to Task templates to deploy the operational rules on BMC FootPrints Asset Core devices.
- Search, import, and link a device to an incident or service request.
- Execute operational rules on a BMC FootPrints Asset Core device.

BMC FootPrints Asset Core integration packages version 2.0

In the earlier version of the Computer System package present in the **BMCRemedyforce20_12_01_009_Pentaho4_1_0_Files_for_FootPrints_AssetCore_Integration.ZIP** file, the **UniuqeCISourceID__c** field of the **Computer System** class was mapped to the **Devices.GloballyUniqueID** field of BMC FootPrints Asset Core. The value of the **Devices.GloballyUniqueID** field might change for a BMC FootPrints Asset Core device. This change in value causes duplicate records to be created in the **Computer Systems** class of the BMC Remedyforce CMDB when you import data by running the **TransferAssetCoreCSinfotoCMDB.kjb** job file in the Pentaho Data Integration tool. Version 2.0 of the Computer System package resolves this issue of duplicate records by mapping the **UniuqeCISourceID__c** field with the **Devices.DeviceID** field. The **Devices.DeviceID** field is unique in BMC FootPrints Asset Core and cannot be changed for a device. Additionally, the BMC FootPrints Asset Core integration packages are upgraded to retrieve more information from the BMC FootPrints Asset Core server.

Release management

A release is a collection of related approved change requests and tasks in an IT service that are tested and introduced into the production environment together. The Release functionality helps you plan, build, test, and deploy controlled releases into your IT environment.

You can see the release manifest after you save a release record. The manifest provides a tabular view of all the tasks and change requests linked to a release. You can provide order numbers and release status values for the linked tasks and change requests.

You can see the change schedule from a release record. The change schedule displays scheduled changes, tasks, and releases for any given day, week, or month.

Supporting more licenses to create client users

You can create Self Service users by using the following license types also:

- Salesforce Platform
- Salesforce
- Chatter Only (also known as Chatter Plus): This license is displayed if Chatter is enabled on your Salesforce organization.

These options are added to the **Default Client Profile** list on the **Remedyforce Administration > Configuration > Application Settings** page. The **Default Client Profile** list is not a mandatory field now.

If you are selecting Salesforce Platform or Salesforce license for a client, you must configure the **Home**, **Chatter**, and **Remedyforce Self Service** tabs visibility for the client.

The clients whose license is Customer Portal Manager, Customer Portal Manager Standard, or Customer Portal Manager Custom can log on to Self Service by using the Self Service URL provided by the system administrator.

However, the clients whose license is Salesforce, Salesforce Platform, or Chatter Only (also known as Chatter Plus) can log on to Self Service by using the Salesforce URL: `https://login.salesforce.com` and clicking the **Remedyforce Self Service** tab. They can also log on to Self Service by using the Self Service URL provided by the system administrator. These clients can follow an incident by clicking the **Follow** link for the incident record from the **Home** tab. If the client is assigned as an Approver in an approval process, the client can approve change requests and incidents from the **Home** tab. In the **Recent Items** component of the Sidebar, the client can view new incidents. However, the client cannot edit these incidents. If the profile of the client has the **ServiceDesk Staff** or **ServiceDesk Change Manager** access level, the visible tabs depend on the tabs that are displayed for the profile.

Lightweight page layouts

BMC Remedyforce 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.

Feedback from the client of an incident or service request

The **Notify the client when an incident is closed** workflow allows you to notify the client that the incident or service request is closed and receive feedback from the client by using the **Incident Template For Submit Feedback Notification When Incident Is Closed or Service Request Template For Submit Feedback Notification on close** feedback email template. The feedback from the client is stored in the Feedback field of the Incident object.

An out-of-the-box **Incident Feedback Report** is available for staff members to generate a report to view the feedback including compliments and complaints sent by clients.

Importing data from Dell KACE™

You can import data from Dell KACE into BMC Remedyforce CMDB by using the Pentaho Data Integration tool. You can launch the Dell KACE console from the Configuration Items List view to view the details of the records that has been imported from Dell KACE.

Integrating BMC Remedyforce with BMC Server Automation

You can integrate BMC Remedyforce with BMC Server Automation. This integration helps you to create incidents and change requests based on the jobs executed in BMC Server Automation. Data in the jobs is mapped to the fields in the Incident and Change Request objects.

Integrating BMC Remedyforce with BMC Real End User Experience Management

You can integrate BMC Remedyforce with BMC Real End User Experience Management application. This integration helps you to create incidents based on the alerts received from BMC Real End User Experience Management application. This integration proactively addresses potential performance issues with their applications by managing these alerts in BMC Remedyforce, assigning to the right staff members to resolve and to report on all activities.

Integrating BMC Remedyforce with CTI adapters for Salesforce

You can integrate BMC Remedyforce with computer-telephony integration (CTI) adapters for Salesforce that are based on Softphone layouts. BMC Remedyforce has been tested to work with CTI Demo Adapter 4.02 for Salesforce. The steps for integrating BMC Remedyforce with all CTI adapters for Salesforce are the same.

Updates to the Self Service apps for mobile devices

If you are a staff member of BMC Remedyforce or a user with these platform-level licenses: Salesforce, Salesforce Platform, and Chatter Only, you can log on to Self Service from a mobile device by using the Salesforce URL: `https://login.salesforce.com`.

Service Request Management enhancements

The following enhancements have been made in Service Request Management:

- While creating Input fields in the **Input** sub-tab of the **Fulfillment** tab of a service request definition, the **Save & New** button is added to allow you to save the current Input field and create a new Input field.
- While adding templates to the **Template** sub-tab of the **Fulfillment** tab of a service request definition, you can configure the order in which the Task templates are completed by clicking **Set Task Execution Order**.
- Using the **Header Section** Response Type when creating Input fields for service requests.

  The **Header Section** Response Type enables you to provide a descriptive header for a group of fields. You can use this field type to group similar Input fields, such as check boxes, picklists, or text fields under one header.

General enhancements

The following general enhancements have been made in BMC Remedyforce:

- While assigning a service request definition, broadcast, agreement, or Self Service theme to an account, you can make them available to a large number of accounts at one time. You can also search for a particular account by entering the search criteria in the **Search** field and clicking **Search**. To clear the search criteria in the **Search** field and refresh the list of accounts in the **Available Accounts** list, click **Undo**. You can use wildcard characters, such as ***** to match one or more characters at the middle or end, but not the beginning, of your search criteria and **?** to match only one character in the middle or end, but not the beginning, of your search criteria. You can navigate to the next or previous page of accounts by using **Next Page** and **Previous Page** next to the **Undo**.
- You can enter a workaround for a problem without designating the problem as a known error after you must disable the **KnownErrorMustBeCheckedForWorkaround** validation rule for the Problem object.
- If you search for a knowledge article, the search results display the **Relevance** column. By default, the most relevant record appears at the top of the search results. The relevance of the knowledge article is calculated by using the formula:

  2 * Used by Staff Members # + 2 * Used in Self Service + 0.75 * Viewed in Self Service #

NOTE

After you upgrade to version 20.12.02.017, the relevance is calculated and displayed for knowledge articles that were created before the upgrade too.

- While creating service targets for agreements, you can configure the time by which the service target must be completed in business days. For example, you create a service target with a target of two days in the **Business Days** field and the business hours are 9:00 AM to 6:00 PM (Monday - Friday). If the agreement is applied to an incident created on 02/07/2012, Monday, at 10:00 AM, the **Due Date** becomes 04/07/2012, Wednesday, 10:00 AM.
- When you create or update a problem record, BMC Remedyforce applies the qualifying service targets of applicable agreements to the problem record.
- You can use the **Preferred Contact Method** field on the custom incident forms to select how the client of the incident or service request will be contacted for further information. The options available are **Email**, **Work Phone**, and **Mobile Phone**. You must customize the Incident form to use this field.

  You can add more options, such as Communicator, to the list by adding picklist values to the **Preferred Contact Method** custom field of the Incident object.

  To allow Self Service clients to provide their preferred contact method while reporting issues or requesting services, you can add the **Preferred Contact Method** list to the Self Service field sets.
- You can activate the `Notify problem owner when change request linked to problem` is closed workflow to send an email message to a problem owner when the change request linked to a problem is closed.
- A new button is provided on the Salesforce page layouts of Incidents, Tasks, Change Requests, Problems, and Broadcasts to create new records from the details pages.
- The Remedyforce Service Request view is added to the Incident module. On the Incidents home page, you can select the Remedyforce Service Request view to view all the service requests.
- You can configure the layout of Salesforce page layouts of the Change Requests, Incidents, Problems, and Tasks objects to click a linked configuration item in the **Linked Services and CIs** section and view the details on the configuration item in the **Remedyforce CMDB** tab. You can also link multiple configuration items simultaneously by clicking the **New Link** button in the **Linked Services and CIs** section and selecting the required configuration items in the window that appears.
- You can add standard descriptions for categories from the **Remedyforce Administration** tab.
- QuickViews that include lookup fields, now show the value (not the Salesforce ID) for a record.
- The **My Incident** QuickView shows color coding for incidents based on the percentage of time remaining. You can use the **Time Remaining Percentage** field to create QuickViews that show colored records based on the percentage of time remaining.

- If you are creating incidents by using email messages and **To** and **CC** fields are populated with values in the email message, the values of **To** and **CC** are saved and displayed in the **Description** field of the incident record.
- A setting is added to configure prevent user from closing an incident, change request, or problem that has tasks in open state. This setting is available on the **Remedyforce Administration > Configuration > Application Settings** page.
- You can provide a closure category to change request, incident, problem, and release records that suggests the reason of closing a record.
- You can hide the **Category** field from the Visualforce forms of the Incidents, Broadcasts, Tasks, Change Requests, and Problems objects and also from the Close forms of these objects (both Visualforce and Salesforce page layouts) by customizing the Remedyforce Settings that are available on the **Setup > App Setup > Develop > Custom Settings** page. Using this setting, you can also configure to make the **Category** field visible or hidden on the Visualforce forms.
- You can now track the life cycle of a configuration item by using the **Stage** field. The **Stage** field is provided on the **General** tab of the Instance Editor. When you upgrade, the values already stored in the **Stage** field of the configuration items for the Business Service class are copied to the new **Stage** field that is now available in the **General** tab of the configuration items of the Base Element Object.
- When you select the **Copy article link** option while searching knowledge articles to resolve an incident, depending on the settings to allow the Self Service users to search knowledge articles in Self Service (the **Enable Remedyforce knowledge articles searching** check box in the **Remedyforce Administration > Self Service > Self Service Settings > Search** tab) and a if knowledge article can be displayed in Self Service (the **Display in Self Service** check box on a new knowledge article page), the link to the knowledge article is displayed in the **Resolution** field or as a **Notes** record in the **Action History** section of an incident.
- Following options are added to the **Source** field that is used for the Incident object:
  - Email message
  - Event
  - Fax, Letter, Paper form, or Memo
  - Own observation
  - Personal visit
  - Web request form
- Following options are added to the **Status** field on the Incident form:
  - Waiting for customer
  - Change pending
  - Closed mail
- Following options are added to the **Status** field on the Problem form:

    - Rejected
    - Accepted
    - In progress
    - Waiting for
    - Change pending
    - Change requested
    - Change completed
    - Dead end
- Following options are added to the **Status** field on the Change Request form:
    - To be approved
    - Approval requested
- On a closed record of incident, change request, broadcast, task, and problem, you can edit the link records of the linked objects. However, you cannot link another record by using the **New Link** button or create and link another record by using the **Create and Link** button.
- You can use permission sets in addition to profiles to provide additional levels of accesses and permissions to a user or multiple users.
- You can use the name of the template as the value of the **Template Name** field in the workflows, web services, or while importing data.
- You can mark templates that you do not want your Staff users to view or use as System templates. System templates are used to apply templates on records that are created using web services or workflows or by importing data.
- You can track the changes of an object record in the **<*Object Name*> History** section of the Incidents, Problems, Change Requests, and Releases objects.
- After you save an incident, change request, task, broadcast, problem, or release record, icon is displayed besides the value of the category. When you click , the category tree is displayed.
- You can now see the change schedule from a change request record.
- If you select Needs Update as rating of a knowledge article and enter your feedback, a change request is created for the knowledge article.
- You can now create knowledge articles from change request and problem records.
- You can use the **Last Queue** field on the Task, Problem, and Change forms to store the name of the last queue to which the record was assigned. You must customize the layout to use this field.
- You can categorize the incidents on the standard Incident form while working on the incidents. You must use the Incident Type Picklist while creating Input fields for incidents.

- You can search knowledge articles from all the Salesforce page layouts. Also, you can add the knowledge search custom button to the layout of Broadcast, Problem, Task, Change Request, and Release forms.
- For the incidents that are created from an email, the email addresses in the From, To, CC field, the date in the Sent field, and the subject of the received email are always saved in the Description field of the incident.
- When you search in the Lookup window of the Salesforce page layout, a list of active records is displayed. You can sort records in an ascending or descending order based on the columns in the lookup window. You can also specify the number of records to be displayed on each page. However, the pagination feature is available for Incident, Task, Change Request, Broadcasts, and Problem lookup fields.
- A new left side bar search component has been added that allows the logged-on staff member to search specific records base on given input search text within all objects of an organization.
- You can view the status of the records that are assigned to a queue even though the records are not assigned to you. The staff and queue assignment feature provides the functionality to have shared ownership (Queue) as well as individual assignment (Staff field) for a record simultaneously.

Self Service enhancements

The following enhancements have been made in Self Service:

- You can configure settings to set the **Browse** panel as default in Self Service.
- System administrators, Change Managers, and Staff users can access Self Service in the Salesforce page layouts by clicking the **Remedyforce Self Service** tab.
- You can redirect the users to the specified company URL when user clicks on the logo that appears in the upper left section of BMC Remedyforce Self Service login page.
- System administrators can enable or disable the preview the service requests in Self Service by selecting the **Enable preview of service requests** check box in **Self Service Settings > Defaults > Service Requests**.

  If you are installing BMC Remedyforce for the first time, this check box is cleared. You must select this check box if you want the Self Service clients to preview the service request. If you are upgrading from a previous version of BMC Remedyforce, this check box is selected and Self Service clients preview the service request before creating it.
- You can view the service requests that you have created for users of your account if you are <*Account name*> Customer Executive or <*Account name*> Customer Manager and you select **Account** from the **View** list.
- You can view the following types of service requests if your profile is created by using the Salesforce, Salesforce Platform, or Chatter Only licenses and you select **Others** from the **View** list:

- Service requests that you have created for other users below you in the Role Hierarchy
- Service requests that are assigned to other users below you in the Role Hierarchy
- Service requests where the logged-on user is not the client, but the service request is assigned to a queue of the logged-on user

Record number starts at a high number

When you install a new BMC Remedyforce package and create a record, the new record number start at a high number in forms that contain AutoNumber fields, such as Incident # and Task #. This high number occurs because test methods are executed when the package is deployed and this increments the record number. For example, when you create an incident record, the record number might start at 1400.

When you upgrade to a new version of BMC Remedyforce, you might observe a gap in record numbers. For example, if you have 1500 incident records and you upgrade, the next incident record that you create might start with a record number of 2000 because the execution of the test methods might have created 500 incident records.

NOTE

This is a limitation of the Force.com platform.

SmartScreen Filter in Internet Explorer 8.0

If you are using Internet Explorer 8.0 with the SmartScreen Filter turned on and you have installed the latest Microsoft Windows update, Internet Explorer 8.0 might close when you access BMC Remedyforce or Internet Explorer 8.0 might utilize 100% CPU at times.

The fix for Internet Explorer 8.0 closing when you access BMC Remedyforce is scheduled to be included in the next cumulative update from Microsoft.

Update to the Formula and Foreign Key fields

In this release, the labels of all Formula fields in BMC Remedyforce are updated with a tilde (~) character that is appended at the end of the label. If your QuickViews, reports, lists, Lookup fields, forms, or Global Search Settings are using formula fields, a tilde character is appended to the original name of these formula fields. For example, the name of the `Category` formula field appears as `Category~` after you install the managed package.

If you use Lookup fields in QuickViews or Global Search Setting, these fields display the internal 13 digit ID for the record, which is not user-friendly. If you use Formula fields (fields with a tilde character appended) instead of a Lookup field, the Formula field displays data that is readable and user-friendly.

For example, if you use the Category Lookup field, it displays 0x0d458djkdf. However, if you use the Category~ Formula field, it displays Hardware.

When you create new QuickViews and reports, or configure Global Search Settings, you must select the Formula fields that are appended with a tilde character. Your existing QuickViews, reports, lists, Lookup fields, forms, and Global Search Settings are updated with the new Formula fields.

The labels of all Foreign Key fields have been updated to remove the `FK` that was prefixed at the beginning of the label.

The following table summarizes the updates made to the Formula and Foreign Key fields.

Field Type	Old Format of Labels	New Format of Labels
Foreign Key fields	FKCategory	Category
Formula fields	Category	Category~

NOTE

If you want to modify the labels, you can use the translation workbench to make the required changes.

Using a single browser instance

Logging on to BMC Remedyforce simultaneously from more than one instance of the same browser results in data loss if one instance of the browser is closed.

Recommended screen resolution

BMC recommends that you view BMC Remedyforce in the 1280x1024 screen resolution.

Disabling Chatter

BMC recommends that you must disable Chatter in BMC Remedyforce if you have disabled Chatter in your Salesforce organization.

To disable Chatter in BMC Remedyforce, navigate to **Configuration** > **Application Settings** > **General** tab in the BMC Remedyforce home page. Select **Disable Chatter** check box.

To disable Chatter in your Salesforce organization, navigate to **Setup** > **App Setup** > **Customize** > **Chatter** > **Manage Your Chatter Settings**. Click **Edit** and clear the **Enable** check box in the Chatter Settings section.

If you disable Chatter in your Salesforce organization and not in BMC Remedyforce, you might get ApexApplication error email messages.

Supported software

The following table summarizes the supported software, devices, and integrations that work with BMC Remedyforce. Support for a version of BMC Remedyforce is designated by +.

Table 1-1: Supported software, devices, and integration information(Part 1 of 2)

Product name	BMC Remedyforce 20.12.02.017.008
Browsers	
Mozilla Firefox 16.0.1	+
Microsoft Internet Explorer 7.0	+
Microsoft Internet Explorer 8.0	+
Microsoft Internet Explorer 9.0	+
Apple Safari 5.0.5	+
Apple Safari 5.1.2	+
Google Chrome 17.0	+
Asset management	
Microsoft System Center Configuration Manager 2007, 2012	+
BMC FootPrints Asset Core 11.5	+
BMC BladeLogic Client Automation 8.2.00, 8.2.01	+
BMC Atrium Device and Dependency Mapping 8.2.1, 8.3.2.2, 9.0	+
Dell KACE K1000 Systems Management Appliance v5.3.53053	+
Knowledge management	
Salesforce.com Article Management	+
RightAnswers Knowledge Management 1.3	+

Table 1-1: Supported software, devices, and integration information(Part 2 of 2)

Product name	BMC Remedyforce 20.12.02.017.008
Network monitoring and Event Notification	
BMC ProactiveNet Performance Manager 8.6, 9.0	+
BMC Server Automation 8.2 Service Pack 1	+
BMC Real End User Experience Management	+
Survey tools	
Survey Monkey	+
Communication protocol	
Lightweight Directory Access Protocol (LDAP) 2, 3	+
Mobile devices	
BlackBerry® Smartphone with operating system 5.0 and later	+
iPhone™ 3G with operating system 3.1.2 and later	+
Data integration tool	
Pentaho 4.1, 4.2	+
Telephony Application Programming Interface	
Computer telephony integration (CTI) (Tested with Demo CTI Adapter 4.02)	+
Social media	
Chatter 3.0	+

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 1-2: 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 the *BMC Remedyforce Getting Started Guide*.

Before you begin

Ensure that you complete the upgrade prerequisites and review “Troubleshooting upgrade issues” on page 15 before you upgrade. For more information, see “Before upgrading to version 20.12.02.017.008” on page 14.

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 the *BMC Remedyforce Getting Started Guide*.

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 the *BMC Remedyforce Getting Started Guide* and the *Using the CI Chatter Feed* section of the BMC Remedyforce Online Help.

4 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**.

5 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**.

6 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**.

7 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**.

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

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.

9 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**.

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" on page 21
- "Assigning version 3.0 page layouts to objects" on page 24
- "Enabling the Home, Chatter, and Remedyforce Self Service tabs for client profiles" on page 25
- "Assigning the Incident, Change, and Remedyforce Client Home page layouts to Self Service client profiles" on page 26
- "Assigning the Remedyforce Contact page layout to profiles" on page 27
- "Displaying the Remedyforce Search and BMC Remedyforce components in the Home tab" on page 28
- "Updating the Search layouts to display inactive records and system templates" on page 29
- "Updating the User Search layout to display details of the staff member" on page 30
- "Configuring the integration between BMC Remedyforce and BMC FootPrints Asset Core" on page 31
- "Collecting feedback through an email survey" on page 40
- "Allowing users to enter workarounds for problems" on page 44
- "Enabling the Auditing feature for configuration items" on page 44
- "Enabling enhanced lookups" on page 45
- "Making statuses available to problems" on page 46
- "Creating the Needs Update option for feedback on knowledge articles" on page 47

Assigning lightweight page layouts to objects

BMC Remedyforce version 20.12.02.017 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. 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 37.

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 37.

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 37.

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 32.

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.

Status	Description
Request Error	The BMC FootPrints Asset Core server could not accept the request.
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 articles

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**.

Items that are not upgraded

If you are upgrading to version 20.12.02.017.008, note that the following items are not upgraded:

- When you upgrade to 20.12.02.017.008, the following labels are not upgraded:
  - App Label in Force.com App Menu
  - Name of the dashboard folder and the dashboard
  - Name of the reports folder
- The HTML and Text email templates for the notification workflows are not upgraded. When you install the new package on the Trial package, the email templates from the new package are not updated on your Salesforce.com organization.

NOTE

The upgrade does not occur to prevent overwriting the changes you have made to the existing email templates.

- If out-of-the-box system data exists for the following objects and you have made updates to this data, then these objects are not updated:
  - Category
  - Status
  - Action
  - Impact
  - Urgency
  - Priority

  During system configuration, these records are skipped.

To be removed features

The following features will be removed from BMC Remedyforce in the next release:

- Custom Fields tab of Application Settings
- Custom fields section of out-of-the-box forms

  BMC recommends that you customize forms by using field sets instead of adding custom fields to a form.

Known issues

The following issues remain open in this release of BMC Remedyforce.

Table 1-3: Known issues (Part 1 of 3)

Issue	Description
60563	When you change the support hours in an agreement or update the existing business hours, the **Time Remaining** field is updated in an applicable service target transaction, but the value of the **Target End Date** field of the service target transaction is not updated.
60576	If you are using Japanese version of BMC Remedyforce, the Search feature of the Online Help does not return search results.
60658	If you create custom actions with the **Launch In** option set as **Remedyforce tab**, some URLs, such as Google Maps, may not launch correctly. **Workaround:** BMC recommends that you use the other options (**Browser tab** or **Browser window**) in the **Launch In** field for such URLs.
60779	If a configuration item is linked to a client, the configuration item is displayed in the Supporting Information section of the client; however, the client is not displayed in the Supporting Information section of the configuration item. Contact BMC Customer Support to help you in implementing the scripted solution.

Table 1-3: Known issues (Part 2 of 3)

Issue	Description
60999	If you are using the 64-bit version of Internet Explorer 8.0.7600.17514, the user interface appears distorted. **Workaround:** BMC recommends that you upgrade to Internet Explorer 9.0.
61653	While assigning a suggested expert to an incident, task, or broadcast, if you search for a staff member on the Select From Staff window, no records are displayed.
62358	When you are using Mozilla Firefox and a broadcast is scrolling in BMC Remedyforce, the CPU consumption is increased.
62902	In customized forms, a custom lookup field that displays the users assigned to a specific role does not filter users correctly.
63085	The number of characters that can be entered in the **Reasons, Rollout Plan, and Back-out Plan** tabs in a change request is limited. **Workaround:** BMC recommends that you add attachments to the change request in the Documentation tab in the Supporting Information section.
63095	In customized forms, referenced fields (fields that are linked by a lookup field) are not displayed. **Workaround:** BMC recommends that you create formula fields.
63154	In Google Chrome or Firefox, if the Zoom value is 100%, the calendar for the **Due Date** field on the Problem form is displayed completely.
63355	If you are changing the owner of an existing problem or task record, the Incident tab is shown highlighted on the **Ownership Edit** page.
63564	The original equipment manufacturer (OEM) version of Internet Explorer, version 8.0.7601.17514, shipped on some Dell computers has performance and functionality-related issues that cannot be addressed. **Workaround:** BMC recommends that you upgrade your browser to Internet Explorer 9.0.
63729	If you create a PDF report from the **Remedyforce CMDB** tab that contains unicode characters, the unicode characters are not displayed in the report.
64039	If you change the **Urgency** field of an incident and save the record, the record is not saved. **Workaround:** To save the record, click **Save** again.
64433	In an enterprise organization, if you had created a custom object that has a same name as the objects used in BMC Remedyforce, such as Task (API name: Task__c), the installation of BMC Remedyforce failed. **Workaround:** You must rename the custom object or enable the **Field History Tracking** field and create **Record Type** for the custom object. For more information, see `https://magickb.remedy.com:443/rkm/viewdoc.jsp?remedy=1&doc=24998&user=Self%20Help`.
64509	If you attach an attachment to an incident, change request, problem, or task record in Salesforce page layouts, the attachments are not visible in the Visualforce page layouts. To access the Visualforce pages of a record, navigate to **BMC Remedyforce Home (tab) > Workspaces**.
64774	In the Visualforce pages of BMC Remedyforce, when you access incidents from the **Action Items** widget, closed incidents are also displayed in the Incidents List View.

Table 1-3: Known issues (Part 3 of 3)

Issue	Description
64962	If you add a Picklist field, called Type to the Incident object in the **Custom Fields & Relationships** section, an error is displayed when you click **Incidents** in the Visualforce pages of BMC Remedyforce.
65134	In the Incident List View, the search results for the values in the **Category** field are not displayed.
65160	In the Self Service app for the BlackBerry mobile devices, you cannot add an existing photo to a request.
65183	In Chrome and Internet Explorer, it is difficult to understand which option you are selecting in the **View** list (on the **Views** drawer) of a change schedule. **Workaround in Chrome:** Select the required option even if the selection keeps changing. **Workaround in Internet Explorer:** Click the **View** list and move your mouse away from the list, but on the **Views** drawer. Select the required option.
65411	If a category is set to be available for service requests and Self Service, but not for incidents, when you create an incident in Self Service by clicking **Request Help**, the category is shown in the **Select From Categories** window.
65646	When you move your mouse over the top links, and click on the buttons that appear, the application might not work as expected. For example, when you move your mouse over **Linked Tasks** link and click **Create and Link** button, the page to create a new tasks might not appear as expected.
65691	When you create a Knowledge Article, the descriptions labels for Article Type are not Localized. Salesforce Translation Workbench has a limitation to translate Record Type Descriptions to different languages. For more information, see `http://success.salesforce.com/ideaView?id=08730000000BpeE`.
65839	The value in the **Description** field is appended with /r character in **Workspaces** > **Incident Management** > **Incidents** > List View. This happens only when you create and modify the incident description and press ENTER after every line while entering the description in the Visualforce pages of BMC Remedyforce by using Internet Explorer browser.

Corrected issues

This section describes the corrected issues in the BMC Remedyforce 20.12.02.017.008 release.

Table 1-4: Corrected issues (Part 1 of 3)

Issue	Case	Description
63240	150039, 152563, 152926	The memory usage of Internet Explorer 8 or 9 increased to a point that it crashed when you were accessing existing records of various objects in BMC Remedyforce.
64950	153176	If more than 200 incidents were assigned to a staff user, an error was displayed when the user accessed the My Work (Incidents and Tasks) QuickView.

Table 1-4: Corrected issues (Part 2 of 3)

Issue	Case	Description
65136	154007	In Google Chrome, if more than one QuickViews were opened in My Dashboard and the refresh time of all the QuickViews was same, when you were typing text while the QuickViews refreshed, the cursor disappeared and the typed data was lost.
65662	154766, 155620	In Self Service, if you had multiple records in the **Additional Information** section of a record, the sorting of records on the Date and Time column was not accurate.
65690	154969	In the Visualforce pages of BMC Remedyforce, if you added a column in the Incident List view, such as Owner, and then sorted on this column, an error message was displayed.
65731	None	When a system administrator or a user (for whom the **Send Apex Warning Emails** check box is selected on User Details page) logged on to Self Service, an Apex governor limit notification was sent to the user.
65740	155087	You could not customize the **Contact Us** option on the Self Service page as expected. The Contact Us template was not applied to the Incident.
65745	155109, 155135, 155122, 155285, 155316, 155386	In the Visualforce pages of BMC Remedyforce, for a closed incident, when you selected the **Reopen Incident** option from the **Actions** menu, an error message was displayed.
65749	155197, 155205, 155509	In the Visualforce pages of BMC Remedyforce, when you double-clicked an incident from the list that appeared when you selected **Incidents for Client** option from the **View Open Incidents for** menu, an error message was displayed.
65750	154843	While adding a **New Field Update** workflow action for a workflow for the Task object, the **Template Name** field did not appear.
65759	154851	Service request or incident could be closed before an approver approved or rejected the request.
65770	155091	When you enabled Read-only permission for the **Due Date** field, the Due Date field displayed duplicated values on the Visualforce pages of BMC Remedyforce. However, this was working as expected in BMC Remedyforce Salesforce page layouts.
65792	155348	When you added a custom picklist field for incident and created an Incident template, the newly created field was displayed more than once. The field was not displayed as a picklist.
65800	155403	When you created a new QuickView, the **Account ~** column was not populated when the client was a SFDC contact.
65801	155483	In BMC Remedyforce, you could not modify fields (for example, Impact, Urgency, Category) for an incident that was created in Self Service using a request definition. While creating the Request Definition in BMC Remedyforce, you selected Response Type as **Lookup** in the **Fulfillment** > **Input** tab and the inputs were mapped to the fields of the incident.

Table 1-4: Corrected issues (Part 3 of 3)

Issue	Case	Description

65804	155460	In Self Service, when you submitted a request by using **Popular Service Requests** > **Request a service**, you received the following error message:
		`BMCServiceDesk:Too many SOQL queries: 101`
		`An unexpected error has occurred. Your solution provider has been notified.`
		This error occurred if you created workflows on Incident object that had **Field Update** type of workflow action.

65813	155309	In the Visualforce pages of BMC Remedyforce, the newly created category was not displayed as a child category of the parent category in the tree view in the **Select from Categories** list. The child categories were not displayed in the category tree view because of a limitation of 1000 categories in the application.
65857	155374	When you tried to add a template to an existing incident, the application added the linked tasks twice instead of once. However, it was working as expected for new incidents. Similarly, when you tried to create service requests from Salesforce page layouts, the application added the linked tasks and change requests twice.
65860	None	When you added custom fields to the Client list view, you could not search for data in the newly added fields.
65868	155836	When you created a template that modified the status of an incident to Closed, and you applied the newly created template for a new or existing incident, you received the following error message: `You cannot create a task for a closed record. Reopen the record to add a task.`

Support information

Based on the support policy adopted September 1, 2011 (`http://www.bmc.com/support/prod-support-policy-time-based.html`), for releases from that date forward, BMC provides technical support for a product based on time rather than number of releases. The previous release-based policy applies to releases before September 1, 2011 (`http://www.bmc.com/support/prod-supp-policy-release-based.html`).

To view the support status for this release, see `http://webapps.bmc.com/support/faces/az/prodallversions.jsp?seqid=178930`.

For information about the support policy, see `http://www.bmc.com/support/product-availability-compatibility`.

If you have problems with or questions about a BMC product, see the Customer Support website at http://www.bmc.com/support. You can view or download product documents, search the Knowledge Base for help with an issue, and download products and maintenance. If you do not have access to the web and you are in the United States or Canada, contact Customer Support at 800 537 1813. Outside the United States or Canada, contact your local BMC office or agent.