Contents

Overview

Hands-on Labs

These labs have been designed to allow participants to experience and experiment with the concepts presented in this class. The exercises provided give you the opportunity to practice configuration and administration of the following applications:

- BMC Remedy with Smart IT 18.08
- BMC Remedy IT Service Management 18.08

These labs are designed for students who are participating in the *BMC Remedy with Smart IT 18.x: Fundamentals Administering* course.

The labs provide you with an outline of the steps and the data that you need to enter. Detailed steps for each task are provided primarily in the Student Guide (eBook). Some of the labs are scenario based to provide you with a more challenging activity; hints are provided where appropriate. During and after each lab, the instructor is available to assist you.

RDP

User Name = Administrator

Password = Passw0rd

Important Notes:

All of the queries, commands, and lengthy text entries are included in the **TextDatInput** notepad file that is in the Student Resources folder on the image desktop. When you need to type/enter data in your labs, you can copy the required text from this file.

Always keep a backup of the files before you start editing the entries or values. Place the backup files in the **Lab Backup** (Add your files here) folder, which is on the image desktop.

While accessing the SQL Server, you do not need to enter any user name and password. However, if ever needed because of certain reasons, use the following credentials:

User name = **sa**

Password = **Passw0rd**

Note:

- All the Asset names in this training are sample names and in no means, represent the actual products/assets.
- Always restart the AR services first and the Smart IT second.

Lab Environment Architecture

The lab environment is made up of one virtual machine. The machine is running a Windows 2016 Server operating system. The following diagram reflects which applications are running and the particular details.

Client and Server

Operating System: Windows Server 2016
 # CPU, GB of RAM, GB of HD: 8 CPU core, 24 GB RAM, 100 GB disk space
Open Ports: 6225 and 6226
Internet: Yes
Network: RFC 1918

SQL Server (SQLEXPRESS) v17.8.1
Java 1.8
Adobe flash player

list of BMC products on **Remedy 1808

- BMC Remedy AR System Server 18.08
- BMC Remedy IT Service Management Suite 18.08
- BMC Atrium Core – CMDB 18.08
- BMC Service Request Management 18.08
- BMC Service Level Management 18.08
- BMC Knowledge Management 18.08
- BMC Remedy Smart Reporting 18.08
- BMC Digital Workplace Advanced 18.08
- BMC Remedy with Smart IT 18.08
- BMC Remedy MidTier

Module 1: BMC Remedy with Smart IT Overview

Objectives

- Verify the Smart IT product version through:
  - REST
  - SHARE:Application_Properties

Lab 1.1: Verifying the Smart IT Version

Task 1: Verify the Smart IT Product Version Through REST

Steps:

1. Launch the Google Chrome web browser.
2. In the web browser address bar, enter the following URL:

   http://localhost: 9000/smartit/rest/version

   Note: In case you are unable to view the details, restart the Smart IT application service.

3. This will display the following details about the Smart IT version:

   Note: In your lab image, BMC Remedy with Smart IT 18.08.00 is installed.

Task 2: Verify Other Version-Related Details in SHARE:Application_Properties

Steps:

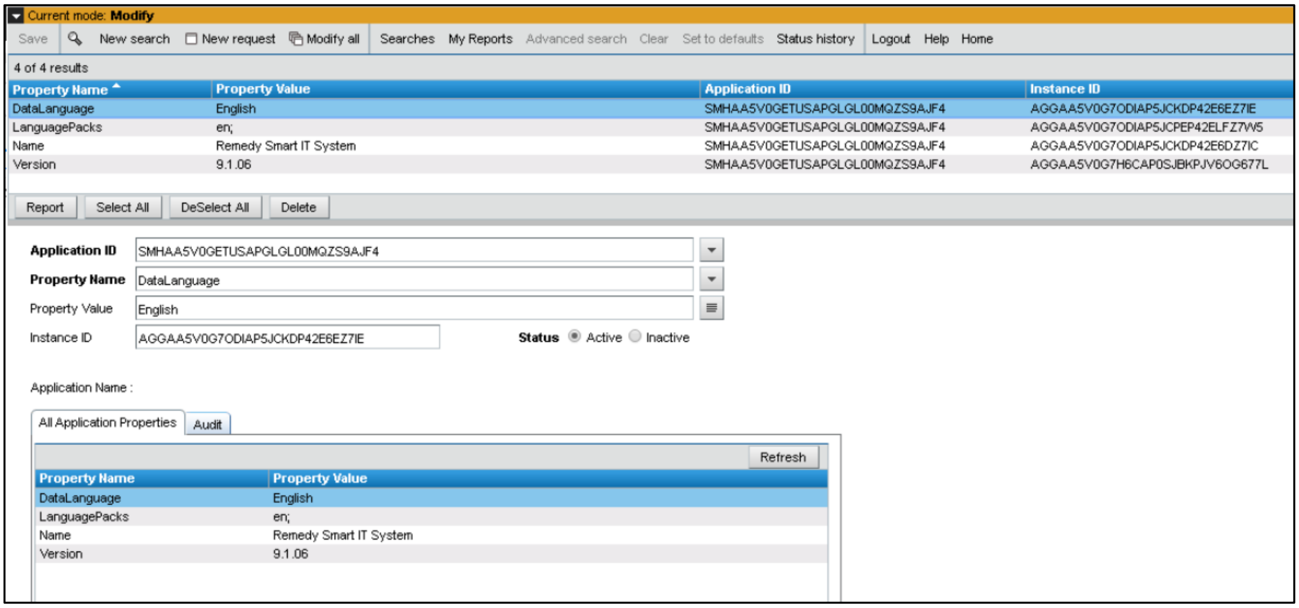
1. In the web browser address bar, enter the following URL:

   http://localhost:8080/arsys/forms/eodd-sqlexp/SHARE:Application_Properties

   Note: You can copy this text from the **TextDataInput.txt** file placed in the **Students Resources** folder on the Desktop.

2. Log in as Allen Allbrook (**Allen/password**).
3. This will display the form in search mode. Click the **Application ID** drop-down arrow.
4. From the list, select **Remedy Smart_IT System**.

5. Click **Search**. You can verify other Smart IT product version-related details.



Module 2: Using BMC Remedy with Smart IT

Objectives

- Review permissions for Smart IT Support Staff user
- Navigate the Smart IT dashboard
- Review the Console and Ticket functionality

Lab 2.1: Reviewing Smart IT Permissions

Task 1: Review Permissions for One of the Smart IT Support Staff User

Steps:

1. Using the **Remedy Mid Tier Login** bookmark in the web browser, log in as Allen Allbrook (**Allen/password**).
2. From the **Applications** tab, select **Administrator Console** > **Application Administration Console**.
3. On the **Standard Configuration** tab, verify that the **Configuration for Company** value is **Calbro Services**.
4. Click **People** > **View**.
5. Select **Mary**'s (Last Name: **Mann**) record from the list of users.
6. Click the **Login/Access Details** tab.
7. On the **Application Permission** tab, review the permissions for this user.

   Mary can access various consoles including Smart IT Incident, Problem, Asset, Knowledge, and Change consoles. This user does not have Release Management permissions.

   Note: We will validate these permissions when verifying the labs.

Task 2: Update Permission for One of the Users

Steps:

You want that **Ian Plyment**, a Support Staff user, should be able to access Release Console. Thus, you need to assign the Release Master permission to this user. Please note that at this point Mary and Ian have the same set of permissions.

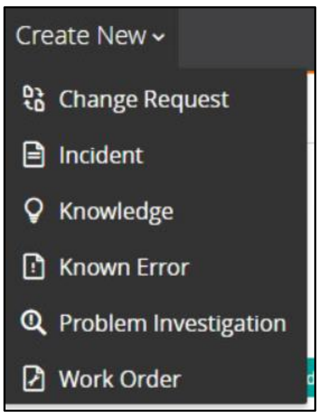
1. From the list of users, select **Ian**'s record.
2. On the **Application Permission** tab, click **Update Permission Groups**.
3. From the **Permission Group** drop-down list, select **Release** > **Release Master**.
4. Click **Add/Modify**.

5. Click **Close**.
6. Log out from Remedy Mid Tier.

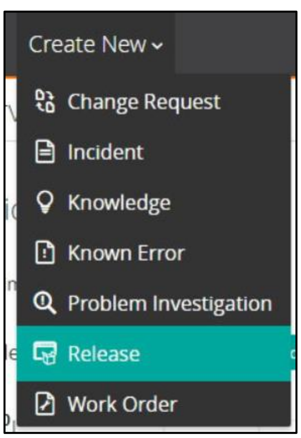
Task 3: Verify your work

Steps:

1. Click the **Smart IT Universal Client 18.08** bookmark to access BMC Remedy with Smart IT.
2. Verify that the Login screen appears.
3. Log in as Mary Mann (**Mary/password**).
4. On the Smart IT Console, click **Create New**. Notice the following options in the **Create New** menu that Mary has access to:



5. Click the down arrow in the upper-right section of the Smart IT Dashboard, next to the profile icon.
6. Logout and log in as Ian Plyment (**Ian/password**).
7. Click **Create New**. Notice the following options in the **Create New** menu that Ian has access to:



Note: Ian has Release User permission; thus, the **Release** option is visible in the **Create New** menu.

8. Click the down arrow in the upper-right section of the Smart IT Dashboard, next to the profile icon.
9. Log out from the Smart IT Console.

Lab 2.2: Navigating the Smart IT Dashboard

Smart IT functionality and elements that users can see or access depend on their user role and access permissions.

Task 1: Access the Smart IT Dashboard and Explore the Updates Feed

Steps:

1. On the Smart IT Universal Client login screen, log in as Allen Allbrook (**Allen/password**).
2. Verify that you can view **Dashboard** that is displayed by default.
3. Verify that you can view the **Updates** feed on the left side of the page. This feed displays a list of updates important to you: SLA alerts, assignments, and status changes of the tickets you are following.
4. In the **Updates** feed, scroll and verify that you can see updates.
5. In the upper-right corner of the **Updates** feed section, click the options (three vertical dots) icon.
6. The **Search** and **Filter** options appear.
7. Select the **Private Notes** check box.
8. Click **Apply**.
9. Verify that the **Updates** feed displays only the notes-related updates.

Task 2: View Service Delivery Statistics in Smart IT

Steps:

1. On the right side of **Dashboard**, verify that you can view Service Delivery statistics.

   Note: Based upon permissions, the Support Staff can view various Incidents, Work Orders, Service Requests, and Change statistics.

2. In the upper-right side of the **Service Delivery** section, click the **Company** drop-down arrow.
3. Select **Invention, Inc**. This will change the Service Delivery statistics.
4. Change the **Company** back to **Calbro Services**.
5. From the **Perspective** drop-down list, select **Backoffice Support**.

   Note: The data that you can see by selecting a group depends on the access permissions defined for you in BMC Remedy ITSM.

6. Scroll down the window to view the other available charts.

Task 3: Explore the Smart IT Consoles

Steps:

1. On the Menu bar, click the **Console** tab.
2. Verify that you see the three console options – **Asset Console**, **Knowledge Console**, and **Ticket Console**.

3. Click **Asset Console**.
4. Verify that the default list of assets is displayed by the **Hardware Managed by Me** category.
5. Verify that the **Asset Console** is displayed with records and the default filters, **Hardware**, **Computer System**, **Deployed**, and **+1 more**.
6. Click **Console** > **Knowledge Console**.
7. Verify that the **Knowledge Console** displays records filtered by **My Assigned Articles**, **All Open**, **Assignee: Me**.
8. Click the arrow next to **My Assigned Articles.**
9. From the list, select **My Groups' Assigned Articles**.
10. Click the **Show Ticket Statistics** button.
11. Click the **Published Count** tab.
12. Verify that you view only the list of grouped articles.
13. Click **Console** > **Ticket Console**.
14. Verify that the **Ticket Console** opens with all open tickets assigned to Allen Allbrook.
15. Click the arrow next to **My Assigned Tickets**.
16. Select **My Groups' Assigned Tickets**.
17. Verify that all ticket types assigned to Allen's group are now displayed.

Task 4: View the Smart Recorder Functionality

Steps:

1. On the Menu bar, click **Smart Recorder**.
2. Verify that the Smart Recorder screen appears and the cursor blinks inside the Superbox.
3. Type **@Bob**.
4. Verify that the matches appear for selection.
5. Select **Bob Baxter**.
6. Verify that the customer details are displayed.
7. Verify that the **Create Ticket** button in the lower-right corner of the screen is now enabled for Allen Allbrook to create a ticket.
8. Click the **Create Ticket** button and select **Create Incident**.
9. Verify that an incident is created with Bob Baxter as the title and a unique Incident ID.
10. Click **Cancel** to exit incident creation.
11. In the Warning dialog box, click **Yes**.

Task 5: Explore the Create New Menu

Steps:

1. On the Menu bar, click **Create New**.
2. Verify that the list for creating a new asset, broadcast, change request, incident, knowledge, known error, problem investigation, release, and work order is displayed.
3. Click **Work Order**.

4. Verify that the **Create Work Order** form opens.
5. Click **Cancel**.
6. In the Warning dialog box, click **Yes**.

Task 6: Explore the Configuration Tab

Steps:

1. Click **Configuration**.

   Note: This tab is visible to the Administrator role only.

2. Verify that the **Admin Console Configuration**, **AQI Question Set**, **Knowledge Template Styles**, and **Screen Configuration** options are displayed.
3. Click **Screen Configuration**.
4. Verify that the Screen Configuration page is displayed with **Global Menu** and other views.
5. Click the down arrow in the upper-right section of the Smart IT Dashboard, next to the profile icon.
6. Click **Log Out**.

Lab 2.3: Using the Console and Ticket Functionality

Task 1: Use Filters on Ticket and Asset Consoles

Steps:

1. Log in to the Smart IT Universal Client as Mary Mann (**Mary/password**).
2. Click **Console** > **Ticket Console**.
3. Click the **Ticket Console** menu arrow and select **My Groups Assigned Tickets**.
4. Click the **Status** column heading to sort the console table by status. The tickets get rearranged and grouped according to the status.
5. Click **Filter** to apply filters to the console table.
6. From the **Show Filters for** menu, select **Ticket Type > Change Request** to filter the list to only change requests.
7. Click **Apply**.
8. Verify that only change requests are displayed.
9. Access the Asset Console (**Console** > **Asset Console**).
10. Click + **1 more** and using the Remove icon (cross), remove the **Managed by: Me** filter.
11. Click **Filter**.
12. Select the **Business Service** check box.

    Note: Keep the other checkboxes as is.

13. Click **Apply**.

14. Verify that the list of assets is now inclusive of **Business Service** assets as well.
15. Click **Clear Filters** on the right side of the screen to remove all filters.
16. Verify that the console is clear again to apply fresh filters.

Note: You must select a minimum of two filters to search for records.

Task 2: Use Filters in Knowledge Console and Save as Preset

Steps:

1. Click **Console** > **Knowledge Console**.
2. Verify that the **My Assigned Articles** option is seen.
3. Click the **Knowledge Console** menu arrow and select **My Groups' Assigned Articles**.
4. Scroll to the right end of the screen and click the **Save as Preset** button.
5. In the **Save Preset** dialog box, in the **Preset Name** field, enter the Preset name as **My Preset**.
6. Review the details of the preset.
7. Click the **Save Preset** button to complete.
8. Verify that the Knowledge Console view is listed as **My Preset**.
9. Click the **My Preset** drop-down arrow.
10. In the list, move mouse pointer over **My Preset**. You should be able to see three options, **Set As Default**, **Edit**, and **Cancel**.
11. Select **Set As Default**. The next time that you open the Knowledge Console, this view of the Knowledge Console will be displayed.
12. Log out from the Smart IT Universal Client.

Task 3: Bulk Actions that You Can Perform on Console Contents (Universal Client only)

Steps:

1. Log in to the Smart IT Universal Client as **Allen Allbrook** (**Allen/password**) using the **Smart IT Universal Client 18.08** bookmarked in a web browser.
2. Click **Console** > **Ticket Console**.
3. Click **Filter**.
4. From the **Ticket Type** list, select **Incident** as **Ticket Type** to view all open incidents records only.
5. Click **Apply**.
6. Remove the **Assign Me** filter option.
7. Select incidents **INC000000000101** and **INC000000000102**. Note the name of the assignee.
8. Verify that the Bulk options appear on the top.
9. Click the **Assign** icon.

   The **Update Assignment** dialog box opens.
10. Select the **Assign to me** check box.

11. From the displayed list of groups that Allen is a member of, select **Calbro Services > IT Support > Service Desk**.

    You also can use the **Support Company**, **Support Organization**, and **Support Group** menus along with **Search** field to find another assignee.
12. Click **Assign**.
13. Verify that the assignment confirmation message appears on the Ticket Console.
14. Verify that the assignee of the incidents **INC000000000101** and **INC000000000102** is now Allen Allbrook.

Task 4: Open a Ticket and View its Details

Steps:

1. On the **Ticket Console**, click **Filter**.
2. Clear the **Incident** filter.
3. Select **Service Request**.
4. Click **Apply**.
5. Verify that only service requests are displayed.
6. Click to open the service request with number **REQ000000000201** (raised for Michel Dunpod).
7. Verify that the record opens displaying all the details.
8. Using the scroll bar, scroll down to view the complete details of the service request.
9. Verify that you see the requester and Request Coordinator details.
10. In the upper-right section of the record, verify that the **Share**, **Follow**, **Print**, **Refresh**, **Request Again**, and **Cancel** options are available for selection.
11. Click follow (star icon) to follow the updates of this service request.
12. Verify that the follow (star icon) is now enabled (color-filled).
13. Scroll down to the **Fulfilment** section of the service request.
14. Verify that you can see an incident corresponding to the service request.
15. On the right side of the service request, verify that you see the **Activity** pane.
16. Next to the **Activity** tab, click the options icon (three vertical dots).
17. Verify that the **Search** field and the other filters for the activities are displayed. You can use this option to narrow down the list when there are many activities.

Task 5: Open an Incident and Share its Details

Steps:

1. Click **Console** > **Ticket Console**.
2. Filter the records to view only all open incidents.
3. Click to open the **INC000000000401** incident record.
4. Use the scroll bar to view all the details of this incident.
5. In the upper-right section of the incident, click the **Share** icon.
6. Select **Email this Incident**.

7. In the **TO** field of the **Compose Email** dialog box, type the name **Mary**.
8. Select the match, **Mary Mann**.

   Note that the **SUBJ** (Subject) field is already populated with the Incident number and title.
9. In the **Email body** field, type **Incident recurring**.
10. Click **Send**. The email is now sent.
11. Verify that this action appears at the top in the **Activity** pane.

Task 6: Perform Global Search

Steps:

1. On the Menu bar, click **Dashboard**.
2. On the right side of the Menu bar, click the Search (magnifying glass) icon.
3. Click the **Tickets & Knowledge** arrow.
4. Click **All**.
5. In the Search field, type the word **login** and press the Enter key.

   The search results appear with all possible matches, such as tickets, problems, knowledge resources, and assets sections. Note that the first result is displayed on the right side.
6. Click **Filter** in the left pane.
7. Verify that the available filter options are listed for you to reduce the search results.

Module 3: Configuring Screens and Provider Settings

Objectives

- Configure screens
- Review Admin Console configuration
- Generate reports

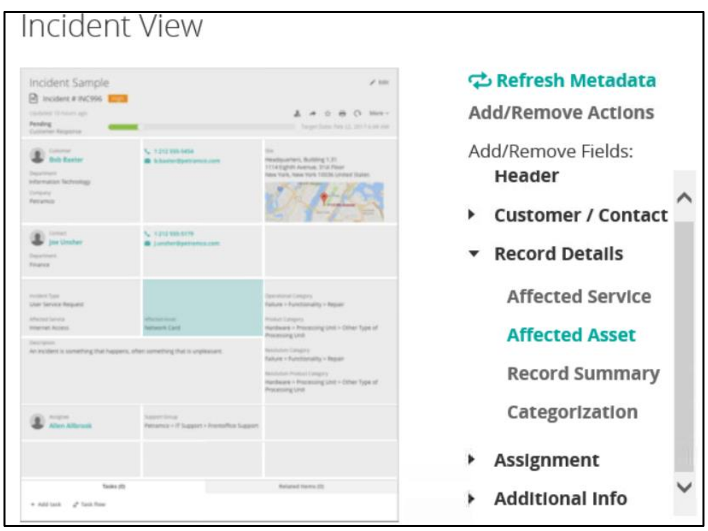
Lab 3.1: Configuring Screens

Exercise 1: Add and Move Fields and Widgets Among Sections – Update Layout of a Ticket Profile

Task 1: Remove Widgets Among Sections in a Ticket Profile

Steps:

1. Ensure that you are logged in to the Smart IT Console as Allen Allbrook (**Allen/password**).
2. On the **Dashboard**, click **Configuration** > **Screen Configuration**.
3. In the **Incident View** section, under **Add/Remove Fields**, select **Record Details** > **Affected Asset**.

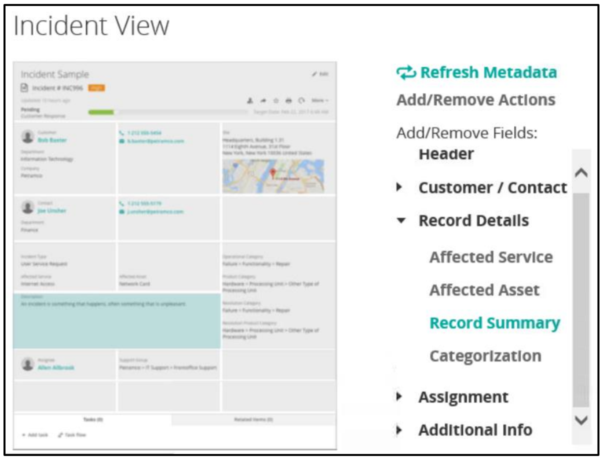


4. In the panel on the right, click close (X) to remove the **Affected Asset** widget from the **Affected Asset** section.
5. Click **Save**.

Task 2: Add Widget Among Sections in a Ticket Profile

Steps:

1. In the **Incident View** section, under **Add/Remove Fields**, select **Record Details** > **Record Summary**.

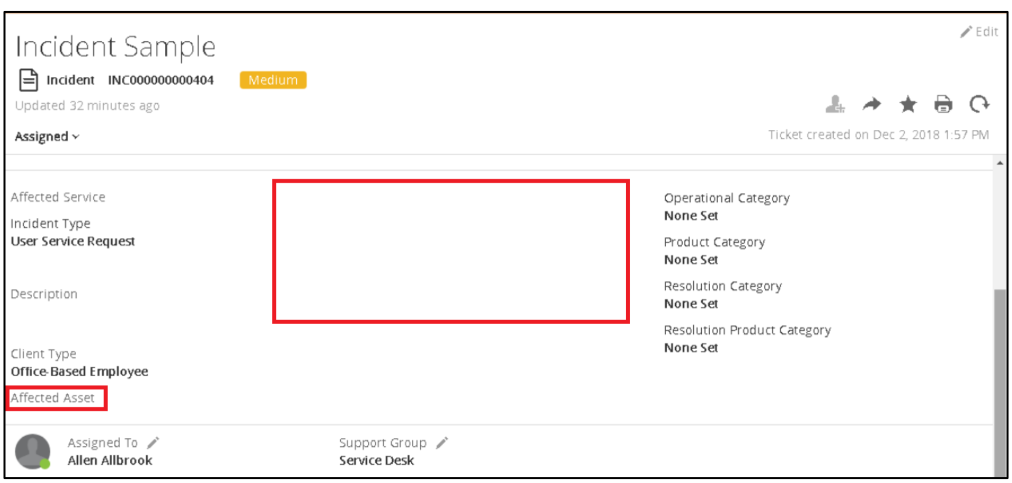


2. In the panel on the left, click plus [+] for the **Affected Asset Widget** field. The field appears in the **Selected Fields** panel on the right.
3. Click **Save**.
4. Click **Refresh Metadata**.

Task 3: Verify Your Work

Steps:

1. Click **Console** > **Ticket Console**.
2. Select any Incident ticket.
3. Scroll down to the **Record Summary** area. You can see that **Affected Asset** is available. This widget is not available in the **Affected Asset** section.



4. Minimize the browser window.

Task 4: Reset the Configuration

Steps:

1. Click **Configuration** > **Screen Configuration**.
2. In the **Incident View** section, under **Add/Remove Fields**, select **Record Details** > **Record Summary**.
3. In the panel on the right, click the close icon for the **Affected Asset Widget** field.
4. The field now appears in the **Available Fields** panel on the left.
5. Click **Save**.
6. In the **Incident View** section, under **Add/Remove Fields**, select **Record Details** > **Affected Asset**.
7. In the panel on the left, click (+) for the **Affected Asset** widget under the **Available Fields** section.
8. Click **Save**.

Note: This is an important task as this would be required for later labs.

Exercise 2: Add Expression to Fields – Update the Property of Fields

For this lab, you will make the **Contact** field mandatory when **Customer Last Name** is **Allbrook**.

Task 1: Build Expression to Make Fields Required

Steps:

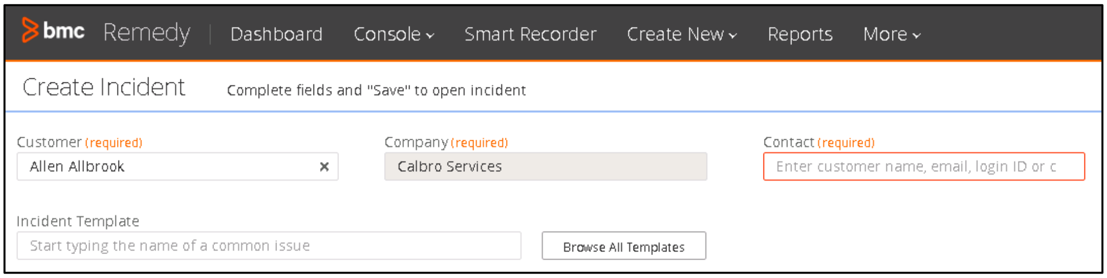
1. On the **Dashboard**, select **Configuration** > **Screen Configuration**.
2. In the **Create Incident View** section, under **Add/Remove Fields**, select **Customer Card** > **Contact Name**.
3. In the **Selected Fields** area, for the **Contact** widget, click the right arrow 
4. Select **Required**.
5. From the drop-down list, select **Meet a Condition**.
6. In the please enter a valid expression, type **$lastName =="Allbrook"**
7. Click **Save**.
8. Click **Refresh Metadata**.

Task 2: Verify Your Work

Steps:

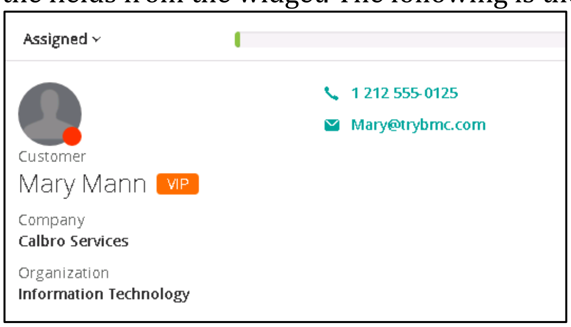
1. Click **Create New** > **Incident**.
2. In the **Customer** field, type **Mary**.
3. From the suggested list, select **Mary Mann**.
4. You will notice that **Contact** field is not set to mandatory.
5. In the **Customer** field, click **x** to delete the name selection.

6. In the **Customer Name**, type **Allen**.
7. From the suggested list, select **Allen Allbrook**.
8. You will notice that **Contact** field is now set to mandatory/required.



Exercise 3: Configuring Widgets

Widgets are a collection of fields and concatenates into one single object. In this lab, you will work on the Customer widget as you do not want the full Customer Name, you only want to view a few of the fields from the widget. The following is the Customer widget before changes.



Task 1: Modify Customer Widget

Steps:

1. Select **Configuration** > **Screen Configuration**.
2. Click **Yes** for the message prompt.
3. In the **Incident View** section, under **Add/Remove Fields**, select **Customer/Contact** > **Customer Name**.
4. In the **Selected fields** area, for the **Customer** widget, click the right arrow .

   You can see that this widget is a combination of First Name, Last Name, VIP, Customer Login ID, and Personal ID.

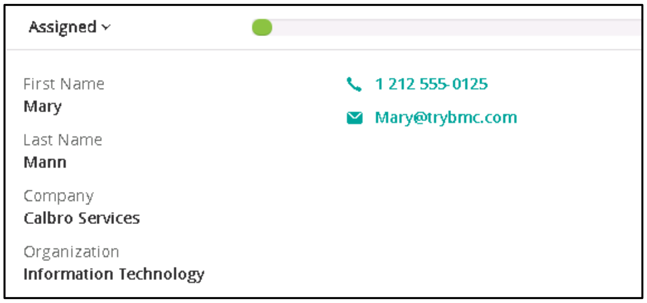
   In the **Available fields** area, all the **Customer** widget fields, such as First Name, etc. appear grey and can't be added to the form.
5. In the **Selected fields** area, click close (**x**) to delete the **Customer** widget.
6. In the **Available fields** area, all the **Customer** widget fields are now available for selection.
7. Add **First Name** and **Last Name** to the **Selected fields** area.
8. In the **Selected fields** area, move **First Name** and **Last Name** as the first and second entries respectively.
9. Click **Save**.

10. Click **Refresh metadata**.

Task 2: Verify Your Work

Steps:

1. Click **Console** > **Ticket Console.**
2. Open an Incident.
3. Verify that the widget is no longer visible and the new fields appear.



4. For **Customer/Contact** > **Customer Name**, remove **First Name** and **Last Name** from the **Selected fields** area. Add the **Customer** widget back to **Selected fields** area.

Exercise 4: Update Dynamic Expressions

Before working on the below lab, ensure that you add the **Customer** widget back to the Incident view. Delete **First Name** and **Last Name** and then add **Customer** widget.

The objectives of this lab are as follows:

- Custom field (**Test Notes**) is set to read only when incident **Status** is **In Progress**.
- Custom field (**Test Notes**) value is set to **Support Staff Working** when incident **Status** is **In Progress,** else the value is set to **Work Awaited.**
- Custom field (**Test Notes**) is set to required when **Priority** is set to **High** and user role is **Administrator**.

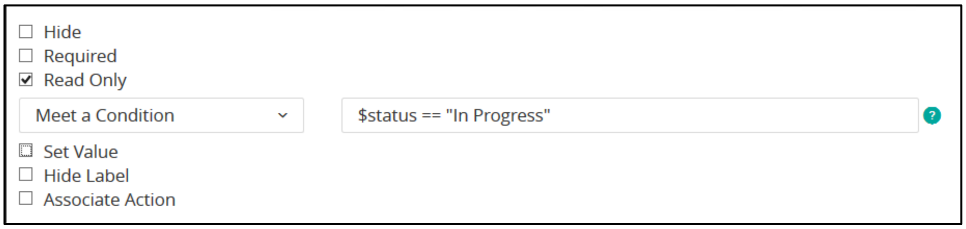
Task 1: Make the Custom Field Read Only

Steps:

1. Select **Configuration** > **Screen Configuration**.
2. In the **Incident View** section, under **Add/Remove Fields**, select **Record Details** > **Record Summary**.
3. For this lab we have added one custom field, **Test Notes**.
4. In the **Selected fields** area, for the **Test Notes** field, click the right arrow . You can see various options.
5. Click the **Read Only** check box.
6. Click the **Always** drop-down arrow and select **Meet a Condition**.
7. In the **Please enter a valid expression** field, enter the following condition:

   $status == "In Progress"

Note: Please type $ and first few characters of the field and select from the suggested list.

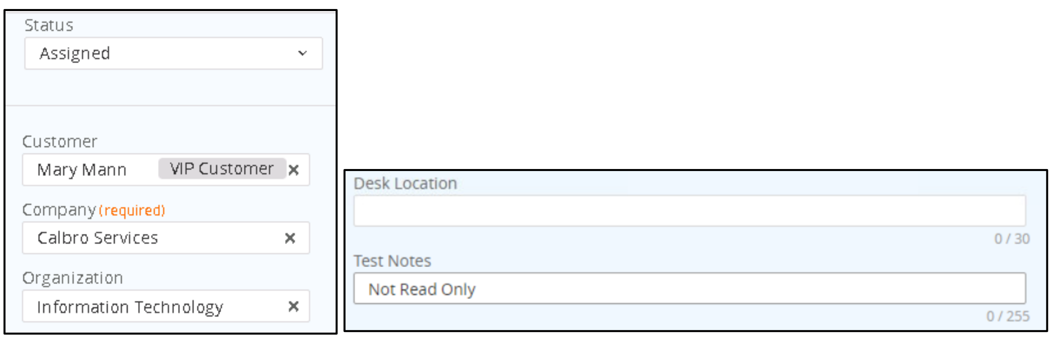


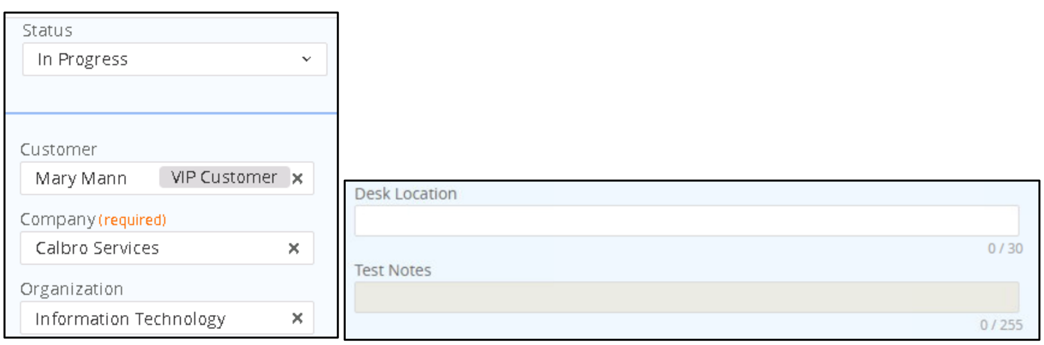
8. Save the changes.
9. Click **Refresh metadata**.

Task 2: Verify Your Work

Steps:

1. Click **Console** > **Ticket Console**.
2. Open an **Incident** with **Assigned** status.
3. Click **Edit**.
4. Try to add some text to the **Test Notes** field. You should be able to enter text.
5. Change the **Status** value from **Assigned** to **In Progress**.
6. The **Test Notes** field changes to **Read only**.





7. Click **Cancel**.

Task 3: Set Client Values for the Field

For this lab, we will use the custom field to practice this concept.

Steps:

1. Select **Configuration** > **Screen Configuration**.
2. In the **Incident View** section, under **Add/Remove Fields**, select **Record Details** > **Record Summary**.
3. In the **Selected fields** area, for the **Test Notes** field, click the right arrow . You can see various options.
4. Click the **Set Value** check box.
5. In the **Please enter a valid expression** field, enter the following "if then else" condition.

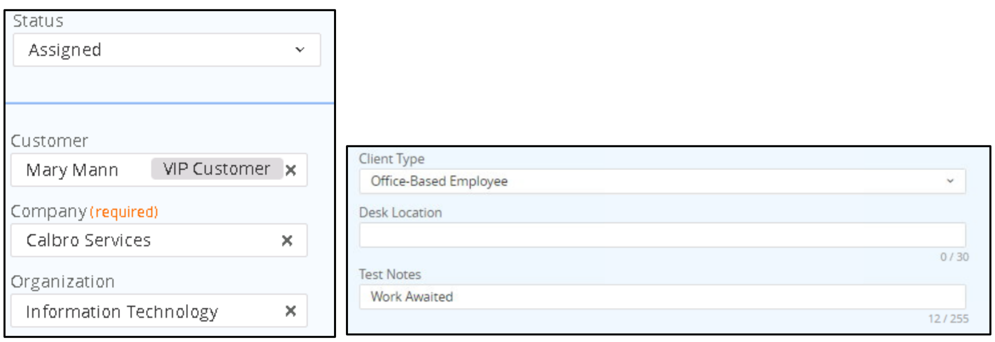
   $status == "In Progress"?"Support Staff Working":"Work Awaited"

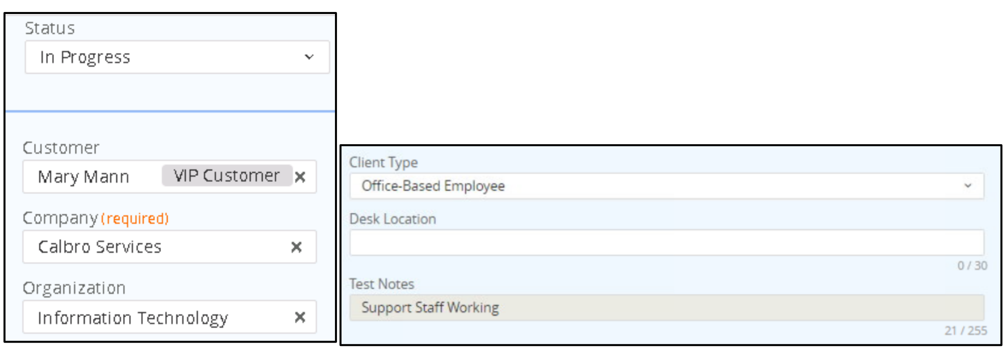
   Note: Please type first few characters of the field and select from the suggested list.
6. Click **Save**.

Task 4: Verify your work

Steps:

1. Click **Console** > **Ticket Console**.
2. Open an Incident with **Assigned** status.
3. Click **Edit**.
4. Change the **Status** value from **Assigned** to **In Progress**.
5. The **Test Notes** value changes and this field becomes **Read only**.





6. Click **Cancel**.

Task 5: Make Custom Field Required When Priority is High and User Role is Administrator

Steps:

1. Ensure that you are logged into the Smart IT Console as Allen. Navigate to the Dashboard.

2. On the same Smart IT Console page, navigate to following path:
   http://localhost:9000/smartit/restapi/person/supportgroupperson/Allen

   Note: This text can be copied from the **TextDataInput.txt** file located in the Student Resources folder on the desktop.

3. Scroll through the page and look for the following highlighted value:


```
    "jobTitle": "Supervisor",
    "isSupportStaff": true,
    "instanceId": "AG26DE20524153HAfzSwB_GkBQ7fQA",
    "title": "Mr.",
    "profileStatus": "Enabled",
    "clientType": "Home-Based Employee",
    "clientSensitivity": "Standard",
    "managerName": "Mary Mann",
    "managerLoginId": "Mary",
    "isUnRestrictedAccess": true,
    "groups": [
      {
        "name": "Request Catalog Manager Computed",
        "id": 20224
      },
      {
        "name": "AI UDM Admin",
        "id": 21504
      },
      {
        "name": "Administrator",
        "id": 1
      },
      {
        "name": "Release Master",
        "id": 20501
      },
      {
        "name": "ROI Viewer",
        "id": 20505
      },
```


4. Note down the **Administrator** role id which is numeral one (**1**). Similarly, you can identify values for other roles.
5. In another web browser, Firefox or IE, open the Smart IT Console and log in as Allen (**Allen/password**).
6. In the **Incident View** section, under **Add/Remove Fields**, select **Record Details** > **Record Summary**.
7. For this lab we will use the **Test Notes** custom field.
8. In the **Selected fields** area, for the **Test Notes** field, click the right arrow. You can see the various options.
9. Clear the **Ready Only** and **Set Value** check boxes.
10. Click the **Required** check box.
11. Click **Always** drop-down arrow and select **Meet a Condition**.
12. In the **Please enter a valid expression** field, enter the following condition.

    $priority == 'High'&&INGROUP(1)

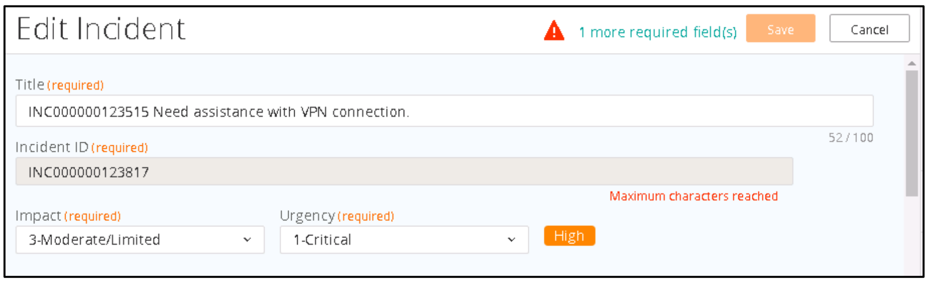
    Note: Please type $ and first few characters of the field and select from the suggested list.

13. Click **Save**.

Task 6: Verify Your Work

Steps:

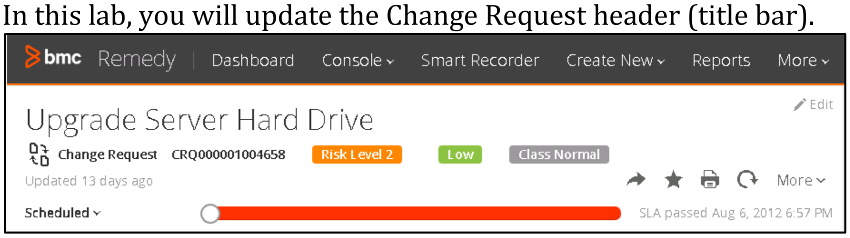
1. Ensure that you are logged in to Smart IT Console as an Administrator (**Allen/password**). Click **Console** > **Ticket Console**.
2. Open an Incident.
3. Click **Edit**.
4. Change **Priority** value to **High** by updating the **Impact** and **Urgency** to **2-Significant** and **2-High** respectively.
5. You can see an alert prompting that 1 required field is there.



6. Click **1more required field(s)** alert. It will take you to the required field, which is the **Test Note** field for which you defined the condition.
7. Log out and log in as Bob Baxter (**Bob/password)**. This user is not assigned Administrator role.
8. Click **Console** > **Ticket Console**. Filter for Incident records.
9. Open an Incident.
10. Click **Edit**.
11. Change **Priority** value to **High** by updating the **Impact** and **Urgency** to **2-Significant** and **2-High** respectively. The alert for the required field will not be displayed.
12. Scroll down and check that you can type text in the **Test Notes** field.
13. Sign out of the Smart IT Console.

Exercise 5: Configuring the Title Bar of the Tickets

In this lab, you will update the Change Request header (title bar).



Task 1: Modify the Change Request Header View

Steps:

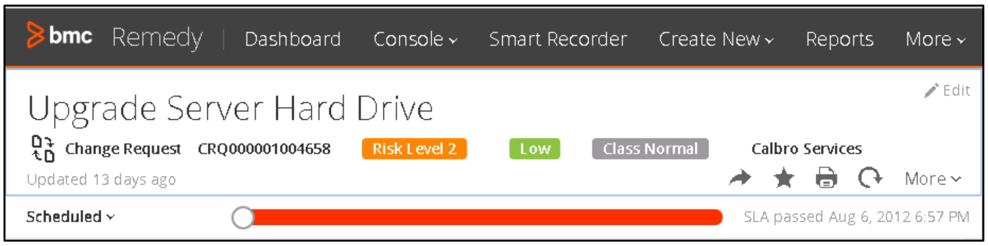
1. Log in to the Smart IT Console as Allen Allbrook (**Allen/password**).
2. On the **Dashboard**, select **Configuration** > **Screen Configuration**.
3. Go to the **Change View** and click **Header**.
4. From the **Available Fields** section, search for and select **Customer Company.**

5. Click **Save**.

Task 2: Verify the Changes

Steps:

1. Click **Console** > **Ticket Console**.
2. Filter the records to view **All Open** change requests.
3. Open a Change record with any status.
4. You will notice that Company Name now appears in the header section.



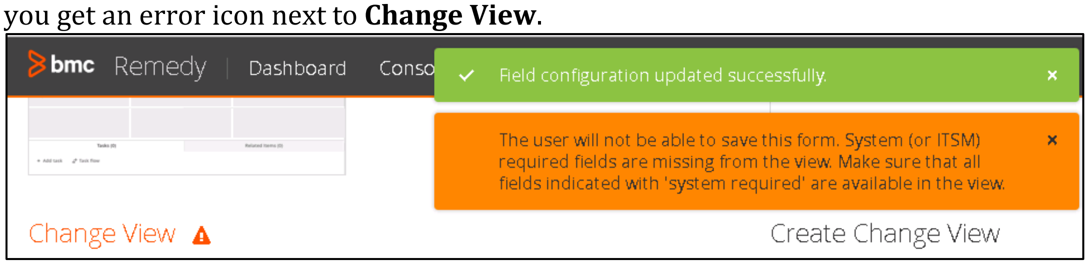
5. Minimize the browser window.

Exercise 6: Validate the Alert Message When ITSM (System Required) Fields are Removed from the Smart IT Views

Task 1: View the ITSM Alert Message

Steps:

1. On the **Dashboard**, select **Configuration** > **Screen Configuration**.
2. Go to the **Change View** and click **Header**.
3. From the **Selected Fields** area, remove the **Change ID** field. This is a system required field.
4. Click **Yes**.
5. Click **Save**. A message appears informing that the user will not be able to save this form. Also, you get an error icon next to **Change View**.



6. Add the deleted **Change ID** field back to **Change View**.

Lab 3.2: Configuring the Admin Console

Task 1: Pre-Verification of the Provider Details and Settings in Database

Steps:

1. Launch the SQL server from the taskbar.
2. Click **Connect**, if not already logged in.

   If prompted, in the **Password** field, enter **Passw0rd**.
3. Navigate to the following table location **eodd-sqlexp** > **Databases** > **Smart IT > Tables**.
4. Navigate to **[SmartIT_System].[PROVIDER_PUBLISHED_SERVICE]** and verify the available provider services.
5. Right-click the table and **Select top 1000 rows to** verify the available provider services.
6. Navigate to **[SmartIT_System].[PROVIDER]** and ensure that **Multi-Cloud Management pluggable provider** is available.
7. Right-click the table and **Select top 1000 rows** and verify that the that **Multi-Cloud Management pluggable provider** is available
8. Navigate to **[SmartIT_System].[PROVIDER_SETTINGS]** and ensure that the following **Multi-Cloud Management pluggable provider** keys are blank. We will validate these values after we set the provider settings from Smart IT.
   - mcsm.password
   - mcsm.host
   - mcsm.protocol
   - mcsm.username
   - mcsm.port
9. Minimize the SQL server window.

Task 2: Configure the Multi-Cloud Management Pluggable Provider Settings

Steps:

1. On the **Dashboard**, select **Configuration** > **Admin Console Configuration**.
2. Click the more icon()and select **Configuration**. You will notice that total 21 providers are available.
3. In the **Providers** table, navigate to the last page **<3>**.
4. Select check box for the **Multi-Cloud Management pluggable** provider.
5. Click the **Multi-Cloud Management pluggable** provider to view the settings section.
6. In the provider settings section, update:

   - mcsm.password = password
   - mcsm.host = customurl-dsmis.trybmc.com
   - mcsm.protocol = http
   - mcsm.username = Hannah@petramco.com
   - mcsm.port = 80

   Note:

   This text can be copied from the **TextDataInput.txt** file located in the **Student Resources** folder on the Lab Image desktop.

   The **mcsm.password** value will be encrypted once you reload the provider.

   ---
7. Click **Update Settings.**

8. Click **Reload Providers**.
9. You will be logged out of the Admin console automatically, this is as per application design.

Task 3: Post Verification of the Provider Details and Settings in Database

Steps:

1. Launch the SQL server from the taskbar.
2. Navigate to **[SmartIT_System].[PROVIDER_SETTINGS]** and ensure that the following **Multi-Cloud Management pluggable provider** keys are now populated with the values you provided in Smart IT.
    - mcsm.password = GPt%2B8bD9rG3t6VmOsqcCxw%3D%3D
      (**Note**: This value would be different for every update as it's an encrypted value.)
    - mcsm.host = customurl-dsmis.trybmc.com
    - mcsm.protocol = http
    - mcsm.username = Hannah@petramco.com
    - mcsm.port = 80
3. Minimize the SQL server window.

Lab 3.3: Generating Reports

Task 1: View Smart IT Active Users Report

Steps:

1. Log in to the **Smart IT Console** as Allen (**Allen/password**).
2. Click **Configuration** > **Admin Console Configuration**.
3. Click the **more**  icon.
4. From the list, select **Reports**.
5. Verify that the Reports Console is displayed and the dashboard displays the active users' details and the count of users on various devices.
6. In the **Date Range** field, enter a 30-day period ending with today's date.
7. Click **Submit Date**.
8. Verify that the report is displayed for the specified period.
9. Click **Clear** to revert to the current active users' report.

Note: You can export this report to CSV format by clicking **Export to CSV**.

Module 4: Configuration Parameters - Centralized Configuration and Server Group Configuration

Objectives

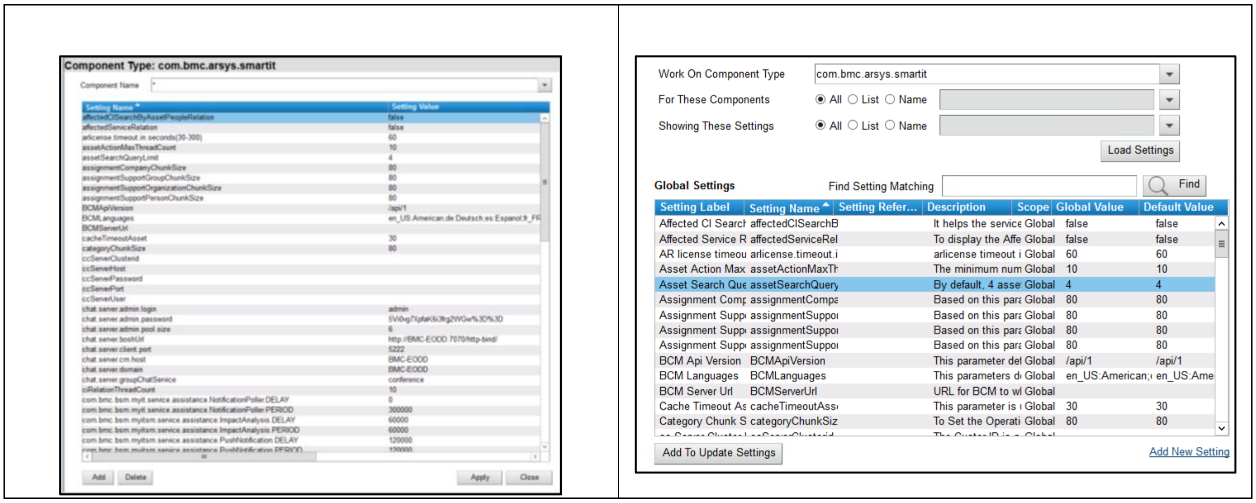
- Update the Centralized Configuration
- Modify the showNameInSmartRecorderCreateTicket property to exclude Customer Name and Contact Details
- Disable application modules
- Modify date and time format
- Enable Google Maps license

Lab 4.1: Updating the Centralized Configuration

Before starting the labs for this module, please go through the following steps to understand the AR System Configuration Generic UI and AR System Server Group Console forms.

Note: This is a verification/review step only.

AR System Configuration Generic UI	AR System Server Group Console
1. Click **Applications** > **AR System Administration** > **AR System Administration Console**. 2. Click **System** > **General** > **Centralized Configuration**. 3. Select **Component Name** as **com.bmc.arsys.smartit > *.**	1. Click **Applications** > **Remedy Management Console** > **AR System Server Group Console**. 2. Click **Server Group Configuration**. 3. Select **Work on Component Types** as **com.bmc.arsys.smartit** and click **Load Settings.**



Notice that the settings in both the forms are same. If you change settings in either of the forms, the other is automatically updated. In this lab, we will practice the tasks using either of these two. This image is a Single Server setup; thus, you will not be able to validate the Global settings, which are primarily true for a Server Group setup.

Task 1: Configuring Search - AR System Configuration Generic UI

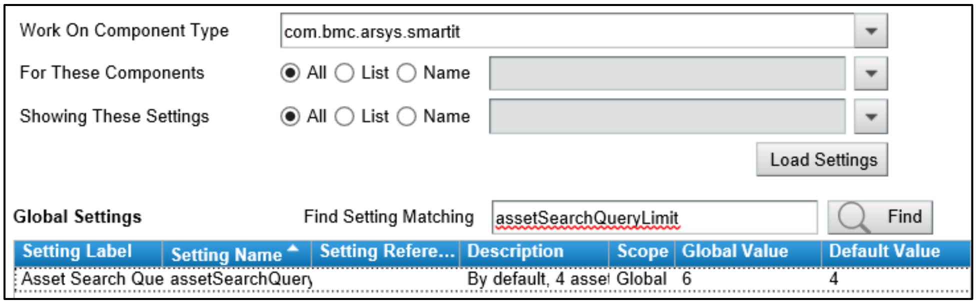
Steps:

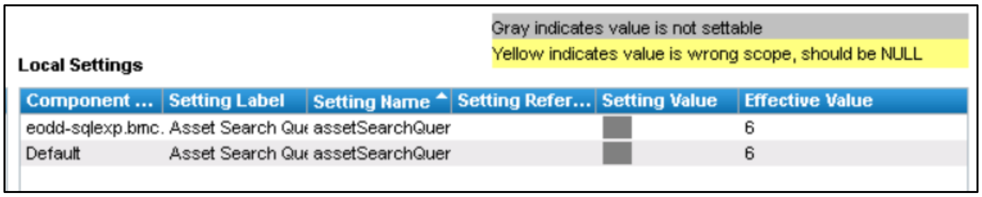
1. Log in to Remedy Mid Tier as Allen Allbrook (**Allen/password**).
2. Click **Applications** > **AR System Administration** > **AR System Administration Console**.
3. Click **System** > **General** > **Centralized Configuration**.
4. Select **Component Name** as **com.bmc.arsys.smartit > *.**The **AR System Configuration Generic UI** form is displayed.
5. Navigate to the **assetSearchQueryLimit Setting Name**.
6. Click in the **Setting Value** cell.
7. Replace **4** with **6**.
8. Click **Apply**.
9. Click **Close**.
10. Click **Home**.

Task 2: Verify Your Work in AR System Server Group Console and Smart IT Dashboard

Steps:

1. Click **Applications** > **Remedy Management Console** > **AR System Server Group Console**.
2. Click **Server Group Configuration**.
3. Select **Work on Component Types** as **com.bmc.arsys.smartit** and click **Load Settings.**
4. In the **Find Matching** setting field, type **assetSearchQueryLimit** and click **Find**. You will notice that the **Global Value** in the **Global Setting** and **Local Settings** area is now updated to **6**. The Default Value will remain **4**.





5. Log out from Remedy Mid Tier.
6. Log in to the Smart IT Console as Bob Baxter (**Bob/password**).
7. On the Smart IT Console page, click **Smart Recorder**.
8. Type **@Mary** and from the list of users, select **Mary Mann**.
9. In Smart Recorder**,** next to Mary Mann, type **@MAC**. Ensure that there is a space between **Mary Mann** and **@MAC**.
10. You will notice that the search result list displays 6 asset records.
11. Log out of the Smart IT Console.

Task 3: Configuring Affected Asset and Service on Incident Ticket - AR System Server Group Console

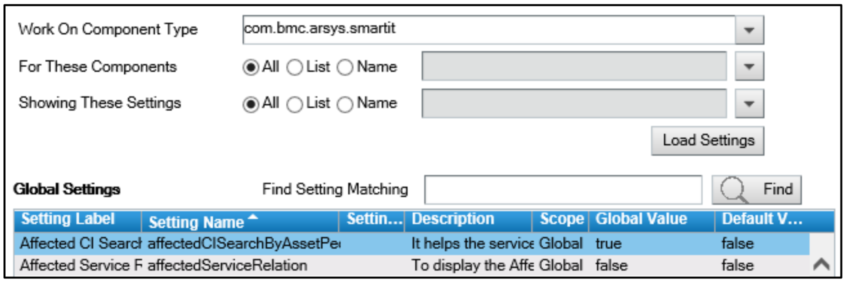
Steps:

1. Log in to Remedy Mid Tier as Allen.
2. Click **Applications** > **Remedy Management Console** > **AR System Server Group Console**.
3. Click **Server Group Configuration**.

Note: If you can't see the **Server Group Configuration** option, click the **Admin Console** tab.

4. Select **Work on Component Type** as **com.bmc.arsys.smartit.**
5. Click **Load Settings**.
6. In the **Find Settings Matching** field, type **affectedCISearchByAssetPeopleRelation**.
7. Click **Find**.
8. The **Global Settings** table reflects one record. Select this record.
9. Click **Add to Update Settings**.
10. The row is added to the **Settings Pending Update** table. Notice '*' in the **Component** column. This means that this setting is applicable to all the servers in this group.
11. In the **Update Selected Rows With Value** field, which is at the bottom of the table, type **true**.
12. Click **Update**.
13. Click **Save All Rows**.

14. The row is removed from the **Settings Pending Update** table, and the changes now reflect in the **Global Settings** table. Notice the change in the **Global Value** column.



15. Click **Logout**.

Task 4: Verify Your Work in AR System Server Group Console and Smart IT Dashboard

Before you verify the configuration settings, let's first verify company name for the asset that will display in the results, even though the asset is from a different company. Mary belongs to Calbro Services. However, because of the setting updates on the Ticket form, assets from other Companies are also available for selection.

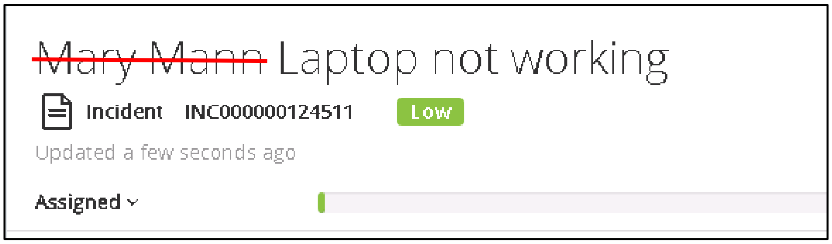
- Access the **Asset Console** in **Smart IT**.
- Add a filter for Company Name as **AnyCompany** and search the assets.
- From the Results list, select **MacBook Air a15555** – this is the asset that we are validating.

Steps:

1. Log in to the Smart IT Console as Mary Mann (**Mary/password**).
2. Access the **Ticket Console**. Filter for All Open Incident records.
3. View any already submitted open Incident record.
4. Click **Edit**.
5. Scroll down to the **Affected Asset** field.
6. Type **Mac**. A list of records appears. Notice the **MacBook Air a15555** record on the list. This is the record from AnyCompany.
7. Select **MacBook Air a15555** and save the record.
8. Click **Logout**.

Lab 4.2: Modifying the showNameInSmartRecorderCreateTicket Property to Exclude Customer Name and Contact Details

In this lab, you will configure the Smart Recorder to exclude the customer names from the title and description.



Task 1: Exclude Customer Name and Contact Details - AR System Configuration Generic UI

Steps:

1. Log in to Remedy Mid Tier as Allen Allbrook (**Allen/password**).
2. Click **Applications** > **AR System Administration** > **AR System Administration Console**.
3. Click **System** > **General** > **Centralized Configuration**.
4. Select **Component Name** as **com.bmc.arsys.smartit > *.** The **AR System Configuration Generic UI** form is displayed.
5. Navigate to the **showNameInSmartRecorderCreateTicket** setting.
6. Click in the **Setting Value** cell.
7. Replace **true** with **false**.
8. Click **Apply**.
9. Click **Close**.
10. Click **Logout**.

Task 2: Verify Your Work in the Smart IT Dashboard

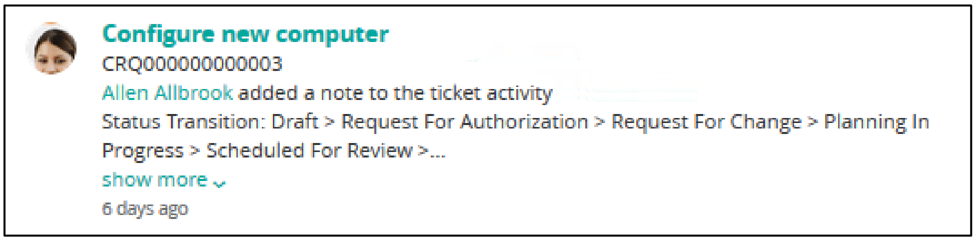
Steps:

1. Log in to Smart IT Universal Client as Allen Allbrook (**Allen/password)**.
2. Click **Smart Recorder**.
3. Type **@Mary** and from the list of users, select **Mary Mann**.
4. In the Smart Recorder, type **Laptop Not working**.
5. Click **Create Ticket**.
6. From the options, select **Create Incident**.
7. Click **Confirm + Save**.
8. You will notice that instead of user name, the description that you added for the ticket appears at the top of the ticket page.

Lab 4.3: Disable Application Module and Modify Date and Time Format

Before you start the lab, verify the following:

1. Ensure that you are accessing the Smart IT Universal Client as Allen.
2. On the Smart IT Dashboard, in the **Updates** feed, verify that the date and time is in the relative format, for example, 6 days ago.



3. Search for a Release record.
4. Log out of the Smart IT Console.

Task 1: Disable an Application Module - AR System Configuration Generic UI

Steps:

1. Log in to Remedy Mid Tier as Allen Allbrook (**Allen/password**).
2. Click **Applications** > **AR System Administration** > **AR System Administration Console**.
3. Click **System** > **General** > **Centralized Configuration**.
4. Select **Component Name** as **com.bmc.arsys.smartit > *.**The **AR System Configuration Generic UI** form is displayed.
5. Navigate to the Setting Name: **disabledSmartITApplications**.
6. Click in the **Setting Value** cell.
7. Verify that the **Property Value** field has **none** as the value. This indicates that none of the application modules is disabled.
8. In the **Property Value** field, enter the application that you want to disable. For this exercise, enter **workorder, release**.
9. Click **Apply**.

Task 2: View/Modify the Date and Time Display Format

Steps:

1. Now, navigate to the **dateTimeStyleProperty** Setting Name.
2. Click in the **Setting Value** cell.
3. Verify that the **Property Value** of **datetimeStyleProperty** is **relative**.
4. In the **Property Value** field, type and change the **Property Value** to **absolute**.
5. Click **Apply**.

6. Click **Close** and logout.
7. Restart the **BMC Remedy Action Request System** and **Smart IT Application** services**.**

Note: Restarting the services will take some time (approx. 5-10 mins).

Task 3: Verify that the Work Order and Release Applications are Disabled

Steps:

1. Access the Smart IT Universal Client as Allen Allbrook **(Allen/password)**.
2. Verify the following:
    - Ticket Creation: The **Create New** menu will not have the Work Order and Release options.
    - Ticket Console/Filter: Tickets and related filters for the Work Order and Release applications do not appear.
    - Global search: Tickets for the disabled applications do not appear in global search results. Search for a release record, type “Release” as the search keyword.

Task 4: Verify the Date and Time Display Change in Smart IT

Steps:

1. Click the **Dashboard** tab.
2. In the **Updates** feed, verify that you now see the date and time in the absolute format, such as 10 Aug, 11:00 A.M.

Lab 4.4: Enabling Google Maps License

Task 1: Enable Google Maps API Key

Steps:

1. Log in to Remedy Mid Tier as Allen Allbrook (**Allen/password**).
2. From the **Applications** tab, navigate to **AR System Administrator** > **AR System Administrator Console**.
3. Click **System** > **General** > **Centralized configuration**.
4. On the **AR System Configuration Generic UI** form, click the **Component Name** drop-down arrow.
5. From the list, select **com.bmc.arsys.smartit** > *****.

    Note: "*" is a global level configuration and is applicable to all the servers in the server group.

6. Scroll down in the list till you find **googleMapsApiKey**.
7. For **googleMapsApiKey**, click in the **Setting Value** cell.
8. Paste the following key: **AIzaSyDwtlQJ4ymtFy4AzgsxzQB3KKHh6EmXk5U**.

    IMPORTANT: This key is to be USED only for this training.

Note: This text can be copied from the **TextDataInput.txt** file located in the Student Resources folder on the desktop.

9. Click **Apply**.

Task 2: Verify the Google Map Widget in Incident View

Steps:

1. Log in to the Smart IT Console as Allen Allbrook (**Allen**/**password**).
2. On the **Dashboard**, select **Configuration** > **Screen Configuration**.
3. Go to the **Incident View** and click **Customer/Contact**.
4. Select **Customer Site**.
5. In the **Selected Fields**, ensure that the **Location Map** widget is added.
6. Click **Cancel**.
7. Click **Console** > **Ticket Console**.
8. Filter the records to view **All Open** Incident requests.
9. Open an Incident record with any status.
10. You will notice that Google Map is available in the Customer details section.

Note: This takes time to get displayed. You can check after performing the labs for Module 5.

Module 5: Configuring Actions and Adding Custom Fields

Objectives

- Configure URL Actions
- Add a Custom Field to Incident Smart IT View
- Configure Provider Actions in Smart IT
- Add a custom field to an Asset view
- Add Actions to Asset View
- Add custom selection option to the OOTB selection fields

Lab 5.1: Configuring URL Actions

Task 1: Configure a URL Action for Global Menu

Steps:

1. Log in the Smart IT Universal Client as Allen Allbrook (**Allen/password**).
2. Click **Configuration** > **Screen Configuration**.
3. Under **Global Menu**, click **Add/Remove Menu Items**. The **Add/Remove Menu Items** dialog box opens.

   Note: You can use the **Alphabetical Order** and **Custom Order** tabs to sort the list as per your preference.

4. Click **Add Menu Item**.
5. In the **Basic Information** section that appears, select the **Desktop Web (UC)** check box, if not already selected.
6. In the **URL/URI** field, enter the URL, **https://www.google.com**.
7. From the **Open Behavior** options, select **New Browser Window**, if not already selected.
8. Under the **Localized Labels to Show** section, in the **Label Text** field, type **Google Search**.
9. Click **Save**.
10. Refresh the browser window.
11. A new tab named **More** appears. Click **More**.
12. Verify that the **More** menu now contains the label, **Google Search**.

    Note: For Allen, the Knowledge option is now available under the **More** menu.

13. Click **Google Search**. The page should open in a new Browser window.
14. Log out of Smart IT Universal Client.

Task 2: Verify the Configured URL Launches Successfully with Other User Credentials

Steps:

1. Log in to the Smart IT as Mary Mann (**Mary/password**).
2. Click **More**.
3. Verify that the **Google Search** is listed in the **More** menu.
4. Click **Google Search**.
5. Verify that the page, **google.com**, launches in a new tab or a new window.

Lab 5.2: Adding Custom Field to Incident Smart IT View

In this lab, for the Incident view, you will verify the custom field to the following forms:

- HPD:HelpDesk
- HPD:IncidentInterface
- HPD:IncidentInterface_Create
- INT:HPDSLM:HelpDesk_SLM_Join_Outer

Note: For this lab, we have already added the Custom Fields to the respective forms. You just need to verify and validate the fields.

Task 1: Verify the Custom Field added to the HPD:Help Desk Incident Request Form

Steps:

1. From the Windows task bar, click the **BMC Remedy Developer Studio** icon .
2. In the **Workspace Launcher** dialog box, click **OK**.
3. Log in with the AR System Administrator credentials (User name: **Demo**, no password required).

   If you need the AR server name, use **eodd-sqlexp**.
4. Verify that the AR application is running in the correct mode by looking in the lower-right corner of the application window and verifying that it says **Best Practice Customization Mode**.

   Note: Best Practice Customization Mode enforces the use of Overlay objects so your customizations are preserved during an upgrade.
5. From the **AR System Navigator** panel, expand the options by clicking the arrow next to **eodd-sqlexp**.
6. Similarly, expand **All Objects** options.
7. Double-click **Forms**. The **Forms** panel will open.

8. From the **Forms** panel, click the arrow next to expand **Filtering options**.
9. In the open window, type **HPD:Help** in the **Display Item Where** field and press **Enter**.

   This executes a search for all forms on the server where the Name contains HPD:Help.
10. Locate the **HPD:Help Desk** (Regular type) form. Verify that the **Customization Type** column displays **Overlay**.

Note: To create an overlay, you right-click this form and click **Create Overlay**. For this lab, we have already created an overlay for you.

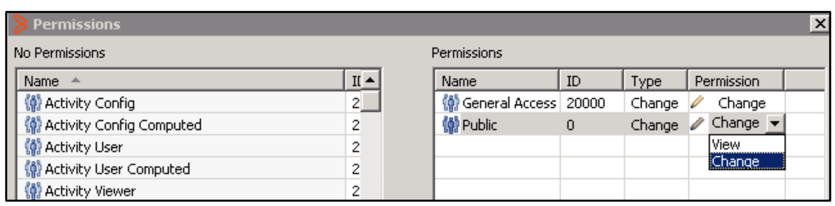
---

11. Double-click the **HPD:Help Desk** form to open it.
12. Maximize the form.

Note: To create view overlay, in the Menu bar, click the **Form** tab. From the displayed options, click **Create View Overlay**. For this lab, we have already created an overlay for you.

---

13. On the form, click the **Additional Search** tab. You will find that some custom fields are added, which you will use during this and other labs.
14. Double-click the **New Custom** field to open the **Properties** pane.
15. Verify the following properties for the field.

Field Property	Value
Display > Label	**New Custom**
Database > Name	**New Custom**
Database > ID	Note down the database ID. *The field ID and database name for custom fields must be exactly the same on all forms.*
Set Permissions	Public (Permission Level – Change) General Access (Permission Level – Change) 

16. No changes are required on this form.
17. Close the form.

Task 2: Verify the Custom Field on the HPD:IncidentInterface_Create form

In order to add the custom field to the Smart IT interface, it will also need to be added to the INT:HPDSLM:HelpDesk_SLM_Join_Outer (if you have BMC Service Level Management installed), HPD:IncidentInterface, and HPD:IncidentInterface_Create.

Steps:

1. On the **Forms** tab, search for **HPD:Incident**. (This will execute a search for all forms on the server where the Name contains HPD:Incident)
2. In the results, double-click the **HPD:IncidentInterface_Create** form.

Note: For this lab the overlay is created for you.

3. Maximize the window.
4. The custom field is already added for you. Double-click the **New Custom** field and verify that the properties match the values in this table (make changes to the field in Developer Studio as necessary).

Field Property	Value
Display > Label	**New Custom**
Database > Name	**New Custom**
Database > ID	This ID should be the same as the one noted during Task 1.
Set Permissions	Verify that the permission is set to Public (Permission Level – Change) General Access (Permission Level – Change)

5. No changes are required in this form.
6. Close the **HPD:IncidentInterface_Create** form.

Task 3: Verify the Custom Field on the Remaining Join Forms

Steps:

1. In the Forms search results, you can see the **HPD:IncidentInterface** form. Double-click this form to open it.

Note: Form overlay and view overlay are already created for this form.

2. Double-click the **New Custom** field and verify that the properties match the values in this table (make changes to the field in Developer Studio as necessary).

Field Property	Value
Display > Label	**New Custom**
Database > Name	**New Custom**
Database > ID	This ID should be the same as the one noted during Task 1.
Set Permissions	Verify that the permission is set to Public (Permission Level – Change) General Access (Permission Level – Change)

No changes are required on this form.

3. Close the **HPD:IncidentInterface** form.
4. Repeat steps 1 and 2 to verify the custom field on the **INT:HPDSLM:HelpDesk_SLM_Join_Outer** form.

No changes are required on this form.

5. Close the form.

Task 4: Verify the Mapping of the Custom Field on the HPD:HII:CreateIncident_100`! Filter

Steps:

1. In the AR System Navigator Panel, double-click **Filters** (under **All Objects**).
2. In the **Filters** panel, click the arrow next to **Filtering options**.
3. In the open window, type **HPD:HII**. (This will execute a search for all filters on the server where the Name contains HPD:HII)
4. Locate the **HPD:HII:CreateIncident_100`!** filter and double-click to open it.

Note: An overlay has already been created for this filter.

5. Maximize the filter window by double-clicking it.
6. In the **Other Definitions** panel, verify that the **Overlay Type** value is **Overwrite.** This has been already updated for this lab.
7. Click **If Actions** > **Push Fields**.
7. Verify the custom field (that you created) appears in the table under the **Automap** button.
8. Click **File** > **Exit**.

Task 5: Add the Custom Field to Incident View in Smart IT

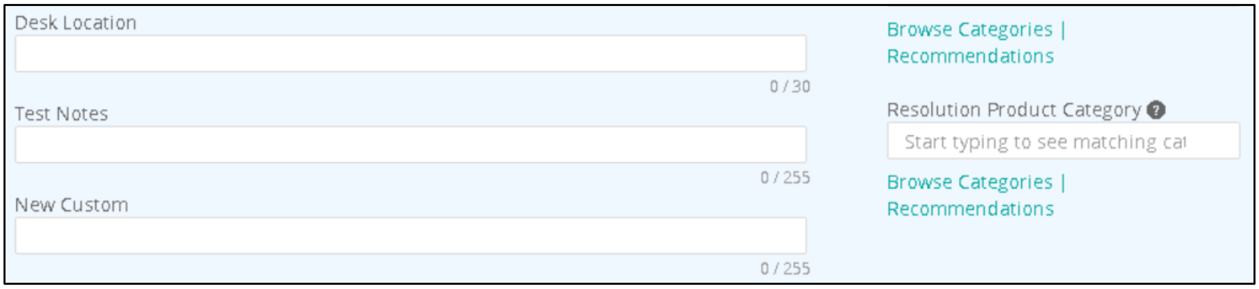
Steps:

1. Log in to the Smart IT Universal Client as Allen Allbrook (**Allen/password**).
2. Access **Configuration** > **Screen Configuration**.
3. In the **Incident View** panel, click **Refresh Metadata**.
4. In the **Incident View** panel, click **Record Details – Record Summary**.
5. In the **Incident View** > **Record Details** panel, search for the **New Custom** you verified.
6. Click the (**+**) icon next to the field name to move the Custom Field over to the **Selected Fields** list.
7. Click **Save**.
8. Click **Refresh Metadata**.

Task 6: Verify Your Work

Steps:

1. Log in to the Smart IT Universal Client as Mary Mann(**Mary/password**).
2. Click **Console** > **Ticket Console**.
3. Filter the tickets to view All Open Incidents,
4. Open any incident to view the ticket details.
5. At the top of the form, in the upper-right area, click **Edit**.
6. Scroll-down the form and just above the assignment area, verify that the **New Custom** displays.



7. Log out of the Smart IT Universal Client.

Task 7: Verify a Dynamic Menu Field (Single Menu Field) in Smart IT View

Steps:

1. Log in to the Smart IT as Allen (**Allen/password**).
2. Access **Configuration** > **Screen Configuration**.
3. In the **Configuration** window, for **Incident View**, under Add/Remove Fields, select **Assignment**.
4. Select **Assignee Group.**
5. Under **Available Fields**, click Add (**+**) **Contact Site** field.

   The field shifts under the **Selected Fields** section.
6. Click the arrow (**>**) preceding the field name.
7. Verify that you see **Hide**, **Required**, **Read Only**, **Set Value**, **Hide Label**, **Populate value with different fields**, and **Associate Action**.

   Note: You can enable the Required feature for Smart IT from here rather than doing it from the AR forms.
8. Verify that the Dependent fields have the green check marks, which signifies that the fields are added in the required AR forms.

   If the fields do not show the corresponding green check marks, they need to be added to the required AR forms first.
9. Click **Save**.

Lab 5.3: Configuring Provider Actions in Smart IT

For this lab, you will configure provide actions for Incident Ticket. Please note that the filters and qualifications are true for this lab where are adding a custom text to the Incident Ticket title. You might need to define different actions and filters to match your specific use cases/scenario. Creating and configuring a Provider Action will go through the following major tasks:

- **Task 1**: Create/verify Custom fields in in Remedy Developer to store the variables – Two custom fields **My Custom Text** and **My Custom Action** are already created for this lab.
- **Task 2**: Configure and add business logic (filter) of provider actions in Remedy Developer
- **Task 3**: Create Provider Actions template using SMT:SmartIT_Provider Action Template Configuration form

- **Task 4**: Configure provider actions in Smart IT for Incident Ticket
- **Task 5**: Validate the final Provider Actions configuration in Smart IT

Task 1: Verify the Two Custom Field in the HPD:HII:CreateIncident_100`! Filter

Steps:

1. Log in to AR Developer Studio as **Demo**/no password.
2. In the AR System Navigator panel, expand **eodd-sqlexp**.
3. Expand **All Objects**.
4. Double-click **Filters** (under **All Objects**).
5. Search for and open the **HPD:HII:CreateIncident_100`!** filter.
6. Expand **Push Fields**.
7. Verify that the following two custom fields appear in the table under the **Automap** button (scroll towards the end of the table).
    - My Custom Text
    - My Custom Action

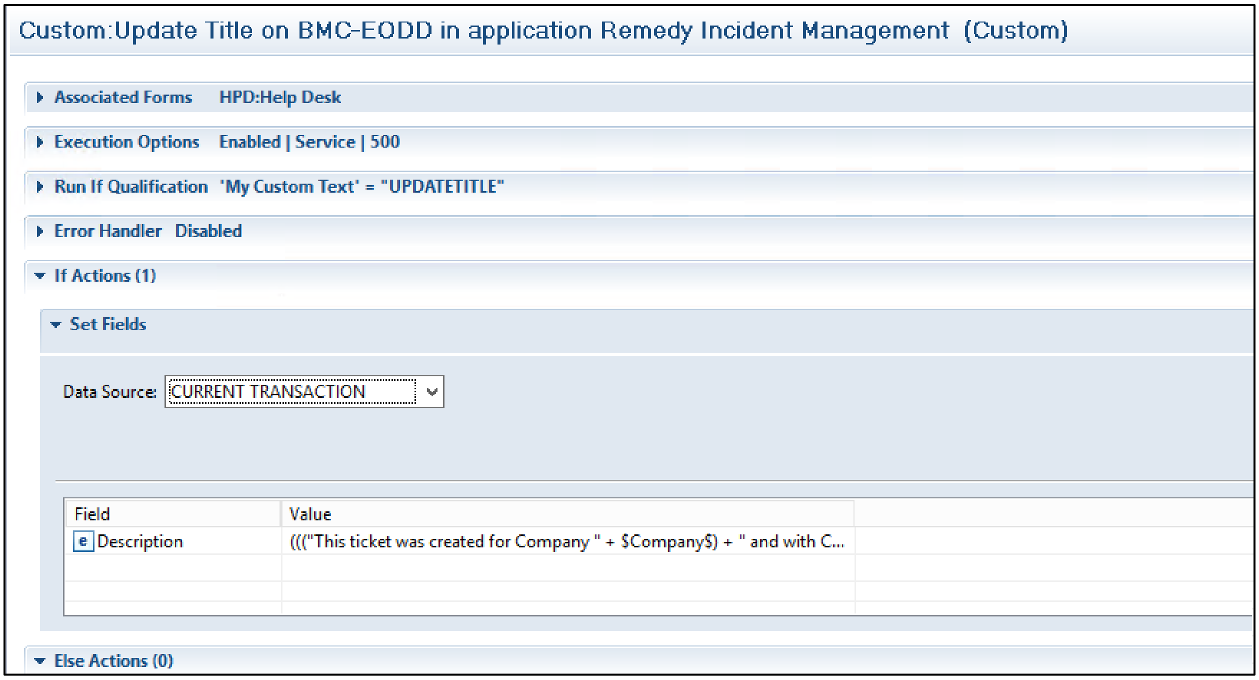
Task 2: Configure and Add Business Logic (Filter) of Provider Actions in Remedy Developer

Steps:

1. In the AR System Navigator Panel, right-click **Filters** and click **New Filter**.
2. Expand the **Filter** window.
3. In the **Associated Form** section, click **Add**.
4. In the **Form Selector** dialog box, for **Filtering Options Name** field, type **HPD:Help Desk**.
5. From the results, select the **HPD:Help Desk** form and click **OK**.
6. Under the **Execution Options** section, select the **Service** check box.
7. In the **Run if qualification** section, build the following query with the action name and the Action name=attributes.

   'My Custom Text' = "UPDATETITLE"
8. Click **OK**.
9. Right-click the **If action** section and select **Add Action > Set Fields.**
10. Set **Data Source** as **Current Transaction**.
11. Define the following mapping:

Field	Value
Description	((("This ticket was created for Company " + $Company$) + " and with Custom Text of ") + $My Custom Action$) + "." **Note**: Please use the qualification button to add the parameters.



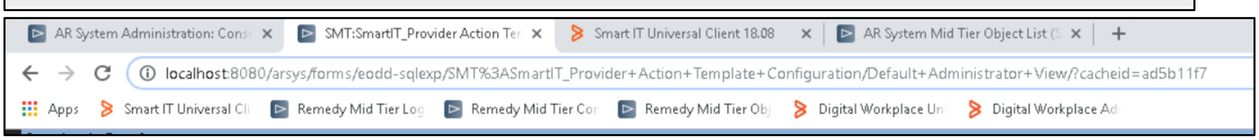
12. Save the filter and provide a filter name **Custom:Update Title**.
13. Click **OK**.
14. Exit from the Developer Studio.

Task 3: Create the Provider Action Template Using the SMT:SmartIT_Provider Action Template Configuration Form

Steps:

1. Log in to Remedy Mid Tier as Allen Allbrook (**Allen/password**).
2. Open the **SMT:SmartIT_Provider Action Template Configuration** form.

   Append the form name in URL.



   The form opens in **Search** mode.

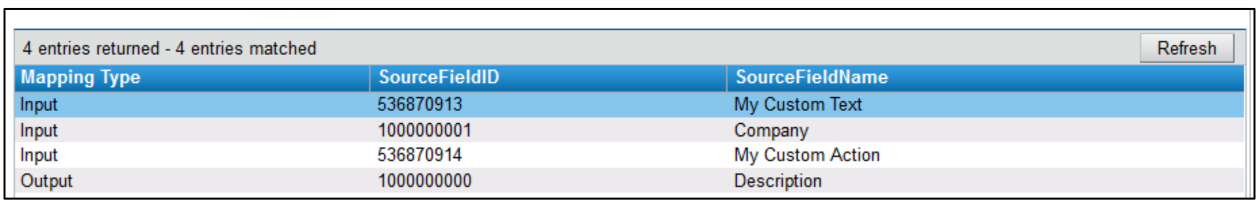
3. Click **New**.

   Note that the **New Mapping** button becomes active.

4. In the **Provider Action Template Name** field, type **New Title** as the Sample Provider Action Template name.
5. Next, click the **Source Form** drop-down arrow.
6. From the list, select **HPD: Help Desk**.
7. From the **Data Source** field, select **incident** ticket type.
8. Set the **Status** to **Online**.

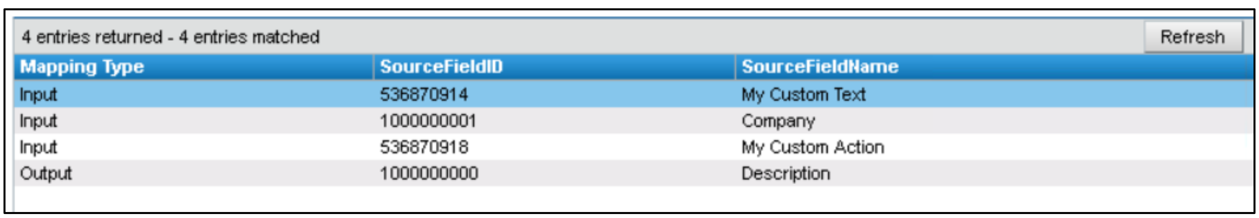
9. Select **Input** from the **Mapping Type** drop-down list.
10. From the **Select Source Field** drop-down list, select the **My Custom Text** source field. After selection, the selected source field is displayed in **Source DB Field Name**.
11. Set **Sequence** for this field as **1**.
12. Click **Save**. The **New Mapping** button becomes active.
13. Now, click **New Mapping**. Add the following remaining Input and Output mappings.

	Value
Mapping Type = Input	
Select Source Field	Company
Sequence	2 Click **Save.**
Select Source Field	My Custom Action
Sequence	3 Click **Save.**
Mapping Type = Output	
Select Source Field	Description
Sequence	4 Click **Save.**



4 entries returned - 4 entries matched Refresh

Mapping Type	SourceFieldID	SourceFieldName
Input	536870913	My Custom Text
Input	1000000001	Company
Input	536870914	My Custom Action
Output	1000000000	Description



4 entries returned - 4 entries matched Refresh

Mapping Type	SourceFieldID	SourceFieldName
Input	536870914	My Custom Text
Input	1000000001	Company
Input	536870918	My Custom Action
Output	1000000000	Description

14. Save the updates.

Task 4: Configure Provider Actions in Smart IT for Incident Ticket

Steps:

1. Log in to the Smart IT Console as Allen Allbrook (**Allen/password**).
2. From the **Configuration** menu, select **Screen Configuration**.
3. In the **Incident View**, click **Add/Remove Actions**.
4. In the **Incident View** > **Add/Remove Actions** dialog box, click **Custom Order**.
5. Click **Add Action**.
6. Under **Action Type**, click **Provider Action**.

7. For Selected Platforms where the action will be displayed, select Desktop Web (UC) and Mobile Platforms (iOS/Android).
8. Click the **Template Name** field. List of templates appear.
9. Select the custom template **New Title** you created earlier.
10. Under the **I/O Mapping** section, select **Available Mode** as **Both**.
11. Under the **Input Mapping** area, perform the following actions for the input mapping fields:

	Value
Company	From Ticket - *select from drop-down list*
	contactCompany - *In the second column/text box type contactCompany and select from the list.*
My Custom Action	User Prompt - *select from drop-down list*
My Custom Text	Default Value – *select from drop-down list*
	UPDATETITLE – *type in the second column/text box*

12. Under the **Output Mapping** area, for **Description**, type **summary** in the field and select from the list.
13. Select the **Synchronous Action** check box, if not selected.
14. Under **Localized Labels to Show**, keep default as is and **Update Title** as the label text for the action.

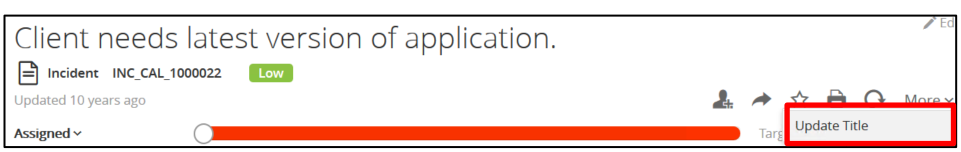
Note: This label text will be displayed under the **More** menu.

15. Click **Save** to configure the action.
16. Click **Refresh Metadata**.
17. If needed, restart the Smart IT services.

Task 5: Verify Your Work

Steps:

1. Log in to the Smart IT Universal Client as Bob Baxter (**Bob/password**).
2. Search and open the incident with ID **INC000000000403**.
3. Click **More.**
4. The newly created action **Update Title** appears. Select the action.



5. The **Complete Action Fields** dialog box appears.
6. In the **My Custom Action** field, type **Testing the Action.**
7. Click **Execute.**

8. The **Edit Incident** page appears. The title of the ticket is updated and reflects the custom provider action description.
9. Click **Save**. The title of the ticket is updated to **This ticket was created for Company Calbro Services and with Custom Text of Testing the Action.**

   This is the custom description you defined earlier.

   ((("This ticket was created for Company " + $Company$) + " and with Custom Text of ") + $My Custom Action$) + "." = This ticket was created for Company Calbro Services and with Custom Text of Testing the Action.
10. Log out of the Smart IT Universal Client.

Lab 5.4: Configuring Provider Actions at a Specific Field in Smart IT

Task 1: Configure Provider Actions at a Specific Field for Incident Ticket

Steps:

1. Log in to the Smart IT Console as Allen Allbrook (**Allen**/**password**).
2. From the **Configuration** menu, select **Screen Configuration**.
3. For **Incident View**, click **Record Details** > **Record Summary**.
4. In the **Incident View** > **Record Details** dialog box, from the **Available** Fields, add the **Specific Field Action** to Selected Field section.

   Note: If you are unable to add the action, delete the blank custom field in the right panel, and then try adding it.
5. Save the details.
6. Click **Refresh Metadata**.
7. Click **Create New** > **Incident** and enter necessary details and submit an incident for Mary Mann.
8. Click **Edit** and in the **Specific Field Action** field, type **Configure Provider**.
9. Save the ticket and note down the ticket ID.
10. Click **Configuration** > **Screen Configuration.**
11. Click **Record Details** > **Record Summary.**
12. In the **Incident View** > **Record Details** dialog box, click the right arrow for **Specific Field Action.**
13. Select **Associate Action**.
14. From the menu, select the custom provider action **- Update Title -** that you created earlier.
15. Select the tick icon to appear as the provider action button (beside the selected field in the tickets).
16. Click **Save**.

17. Click **Refresh metadata**.

Task 2: Verify Your Work

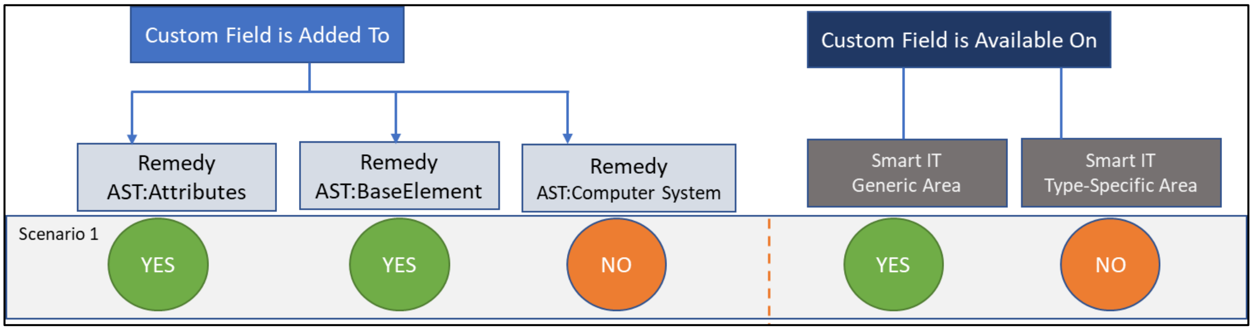
Steps:

1. Search for and open the Incident Ticket that you submitted in **Lab 5.4 - Task 1** lab.
2. Scroll to the ticket summary section.
3. The **Specific Field Action** field appears. You can also notice the icon next to it.

4. Click the tick icon  to execute the action. The **Complete Action Fields** dialog box is displayed.
5. In the **My Custom Action** field, type **Update Title**.
6. Click **Execute.**
7. The **Edit Incident** page appears.
8. Click **Save**. Notice that the ticket title is updated.

Lab 5.5: Adding a Custom Field to an Asset View

In this lab exercise, you will add a custom field to the Smart IT Asset View and will follow the given scenario:



Scenario - Adding Custom Fields in the Generic Area of the Smart IT Form.

Task 1: Add Custom Field to AST:Attributes Form

Steps:

1. Ensure that the Developer Studio is open in **Best Practice Customization** mode.
2. Expand **eodd-sqlexp** > **All Objects** options.
3. Double-click **Forms**. The Forms panel will open.
4. From the **Forms** panel, click the arrow next to expand **Filtering options**.
5. In the open window, type **AST:Attributes** in the **Display Item Where** field and press **Enter**.
6. Right-click the **AST:Attributes** form and click **Create Overlay**. An overlay of this form will open.
7. In the Menu bar, click the **Form** tab.
8. From the displayed options, click **Create View Overlay.**
9. On the form, you will add a new field. Right-click and from the options, select **Create a New Field** > **In Current View** > **Character** field.
10. Double-click the **Character_Field_c** field to open the **Properties** pane.
11. Enter the following properties for the field.

Field Property	**Value**
Display > Label	My Asset Custom
Database > Name	My Asset Custom (remove the __c)
	Note down the Database > ID *If this ID conflicts with any of the earlier Custom Field IDs, please change the system provide ID with your ID. You can change the last two digits of the ID to higher side,* **Note**: The field ID and database name for custom fields must be exactly the same on all forms.

Set Permissions	Public (Permission Level – Change) General (Permission Level – Change)

12. Save the form.
13. A dialog box with warnings opens for confirmation. Click **OK**.

Task 2: Add Custom Fields to the AST:BaseElement Form

Steps:

1. This time, search for the **AST:BaseElement** form.
2. Right-click the **AST:BaseElement** form and click **Create Overlay**. An overlay of this form will open.
3. In the Menu bar, click the **Form** tab.
4. From the displayed options, click **Create View Overlay**. On the form, you will add a new field that you added earlier to the **AST:Attributes** form.
5. Right-click and from the options, select **Add Fields from AST:Attributes**.
6. From the **Add Fields** dialog box, select the **My Asset Custom** field.
7. Click **OK**.
8. Verify the following properties for the field.

Field Property	Value
Display > Label	My Asset Custom
Database > Name	My Asset Custom
	The **Database** > **ID** matches the field ID you noted during Lab 5.5 **-** Exercise 1 **-** Task 1 for the **AST:Attributes** form. Update the value if you find it incorrect.
Set Permissions	Public (Permission Level – Change) General (Permission Level – Change)

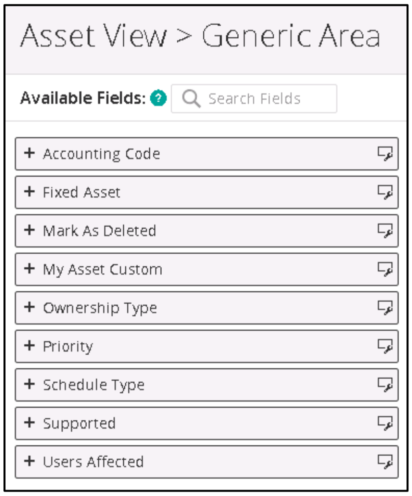
9. Save the form. A dialog box with warnings opens for confirmation. Click **OK**.
10. Restart the Smart IT Application Service.

Task 3: Verify Your Work

Steps:

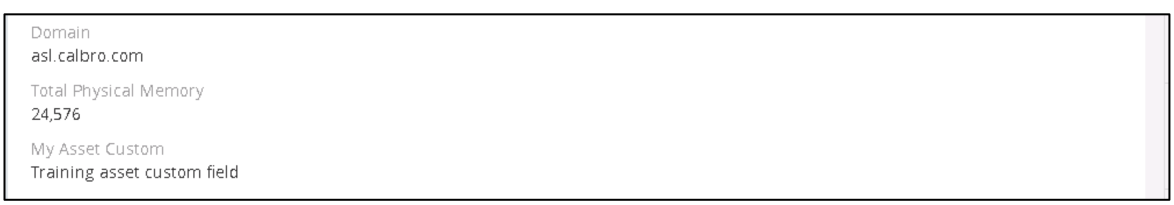
1. Log in to the Smart IT Console as Allen (User name: **Allen** and Password**: password**).
2. Access **Configuration** > **Screen Configuration**
3. In the **Configuration** window, for **Asset View**, under **Add Remove Fields**, select **Type-Specific Area.**
4. In the **Asset View** > **Type-Specific Area** panel, from the Select **Asset Type** drop-down list, select **Computer System**. Under **Available Fields,** you cannot see the custom field **My Asset Custom** you created.
5. Click **Cancel**.

6. Select **Add Remove Fields** > **Generic Area**. In the **Asset View > Generic Area** panel, under **Available Fields**, you can see the custom field **My Asset Custom** you created earlier.



7. Click add (**+**) for the **My Asset Custom** field. The field shifts under the **Selected Fields** section.
8. Click **Save**.
9. Click **Console** > **Asset Console**.
10. Add filter to view the **Computer System** assets with the **Deployed** status.
11. Select one Computer system record from the displayed results.
12. Click the **Edit** icon for the Generic area.
13. The custom field **My Asset Custom** is available for data entry. Type **Training asset custom field.**

14. Click **Save**.
15. The custom field with data entered now appears on the Computer System form.



Lab 5.6: Adding Actions to Asset View

Scenario: Calbro Services has purchased 5 assets: 2 laptops, 2 Printer and 1 Mainframe. These assets have been added to the inventory and the status of these assets is **Received**. Now, you need to create an Asset Action so that you assign (**Managed By**) these assets to Bob Baxter, the manager of the Payroll department, change the status to **Deployed**, and deployment/installation date is also added.

Note: Only read the following table, **do not perform** the table details.

Task	Values
Verify Assets	Laptop – MacBook Pro NBVXCF Laptop – MacBook Pro MXAZSD Printer - Canon Express 20D Printer - Canon Laser Printer1003X Mainframe - Cisco Mainframe – MDS
Update Status to	Deployed
Update Relationship	Managed By – Bob Baxter Owned by – Payroll
Update Installation Date	One day from today

Pre-Verify:

1. Ensure that you are logged in to Smart IT as Allen Allbrook (**Allen/password**).
2. Click **Console** > **Asset Console**.
3. Search for **Computer System** assets with status as **Received**.

   Five assets should appear.

Task 1: Configure a Custom Asset Action

Steps:

1. From the **Configuration** menu, select **Screen Configuration**.
2. On the **Configuration** page, for the **Asset View**, click **Add/Remove Actions**.
3. In the **Asset View** > **Add/Remove Actions** pane, select **Custom Order.**
4. To configure actions, click **Add Action**.
5. Under **Action Type**, click **Asset Action**.
6. To enable access to the action through desktop and mobile platforms, select the **Desktop Web (UC)** and **Mobile Platforms (iOS, Android)** check boxes.
7. Click the **Apply to Asset Types** drop-down arrow.
8. Under **Apply to Asset Types**, select an asset type – **Computer System**.

   Note: The Field type will not reflect the change. However, if you click the drop-down arrow again, you will see that the option is selected.

9. Under **Collect User Input**, select the **Create People Relationships** check box.
10. Select **Update Asset**.

11. From the list of options, select **Installation Date** and **Status**. These are the fields that you want to update in the asset profile.
12. Under the **Localized Labels to Show** section, type **Deploy and Allocate New Assets** label for the action.
13. Click **Save**.
14. Click **Refresh Metadata**.

Task 2: Run the Custom Asset Action

Steps:

1. Access the **Console** > **Asset Console**.
2. The five assets with **Received** status should appear. If not, then specify the following filters to search for assets that you want to update:
   - Asset Type = **Computer System**
   - Status = **Received**
3. Click **Apply**.
4. Select check boxes for all the five assets in the search result.
5. The **Asset Actions** option appears just above the CIs table.
6. Click the **Asset Actions** option.
7. The **Deploy and Allocate New Assets** action appears on the list. Select this action. The **Deploy and Allocate New Assets** pane is displayed.
8. You can see two custom actions, **Update Asset Records** and **Create People Relationships**.
9. For the first action **Update Asset Records**, click the **Status** drop-down arrow.
10. Select **Deployed**.
11. In the **Installation Date** field, enter tomorrow's date.
12. Click **Next Step**.
13. The **Create People Relationships** action is selected. Click the **People Type** drop-down arrow.
14. From the list select **Department** and **Filter by Company** should be **Calbro Services**.
15. From the list of Departments, select **Payroll**.
16. Click the **Role** drop-down arrow.
17. From the list, select **Owned by**.
18. Click **Save**. A message confirming the successful running of the asset action is displayed.
19. Now, to create a relationship between the selected assets and a person, you need to perform the Step 2 to Step 14 again for the five assets. This time you need search for and select the same five records with the **Deployed** status.
20. For the **Create People Relationship** action, select **Person** from the **People Type** list.
21. Search for Bob Baxter (press ENTER).
22. Select Bob's record.
23. From the **Role** drop-down list, select **Managed by**.
24. Click **Save**. A message confirming the successful running of the asset action is displayed.

25. Log out from Smart IT.

Task 3: Verify Your Work

Steps:

1. Log in to the Smart IT Universal Client as Bob Baxter (**Bob/password**).
2. Access the **Console** > **Asset Console**.
3. Specify the following filters to search for assets that you want to update:
    - Asset Type = **Computer System**
    - Status = **Deployed**
4. Click **Apply**.
5. Open the Canon Express 20D asset record.
6. In the header section, verify that the **Status** value is set to **Deployed**.
7. Now, scroll down to the **Lifecycles Dates** field and click the **Show** link. Notice that the **Installation** date is set for tomorrow.
8. Click the **People** tab and notice that:
    - **Managed by** is set to **Bob Baxter**
    - **Owned by** is set to **Payroll**
9. Click **Log out**.

Lab 5.7: Adding Custom Selection Option to the OOTB Selection Fields

Task 1: Add Custom Selection in OOTB Field

Steps:

1. In BMC Remedy Developer Studio, open the **HPD:Help Desk** form. An overlay is already created during earlier labs.
2. Select the **Status** field to which you want to add a custom option.
3. In the **Properties** dialog box, select **Overwrite** from the **Overlay Type from Permissions** and **Others** menu.
4. Under the **Property** section, click **Selections** ... in the **Attributes** options.
5. For Overlay message dialog box, click **Yes**. The **Selections** dialog box appears.
6. Click **Add**.
7. Replace the default row value with text **Updated** for **Selection Values** and **Alias**.
8. Click **OK**.
9. Save the **HPD:Help Desk** form.
10. Restart the Smart IT Application service to make the added value visible in Smart IT.

Task 2: Verify Your Work

Steps:

1. Log in to the Smart IT Universal Client as Allen Allbrook (**Allen/password**).
2. Access the **Console** > **Ticket Console**.
3. Search for an Incident record.
4. Open an Incident record.
5. Click the **Status** drop-down arrow.
6. Again, click the **Status** drop-down arrow. You can see the newly added **Updated** option on the list
7. Do not make any changes, click **Cancel**.

Module 6: BMC Remedy IT Service Management Server

Objectives

- Manage Notifications from IT Service Management
- Create categories
- Manage access to tickets and resources in Smart IT/Data Access Model
- Configure file attachments

Lab 6.1: Managing Notifications from Remedy IT Service Management

Task 1: Set the Smart IT Push Notification Locale (Mobile Clients)

For localized users, the People records need to be updated to ensure that notifications are delivered in the correct language to mobile devices.

Steps:

1. Log in to the IT Service Management Home page using the application administrator credentials (User name: **Allen** and Password: **password**) using the **Remedy Mid Tier Login** bookmark in the web browser.
2. From the **Applications** tab, navigate to the **Administrator Console** > **Application Administration Console**.
3. On the **Standard Configuration** tab, verify that the Configuration for **Company** value is **Calbro Services**.
4. Click **People** > **View**.
5. Select Michel's (Last Name: **Dupond**) record from the list of users.
6. Click the **Notifications** tab.
7. From the **Notification Language** field, select French (France).
8. Click **Save**.
9. Click **Close**.
10. Click **Logout**. The changes are saved and will get reflected for the user.

Task 2: Enable Smart IT Notification Settings by Company/Module

Steps:

1. Log in to the IT Service Management Home page with AR System Administrator credentials (User name: **Demo**; no password required).
2. Change the navigation to the following form **SMT:SmartIT_NotificationConfig** by using the URL:

   http://localhost:8080/arsys/forms/eodd-sqlexp/SMT:SmartIT_NotificationConfig
3. The form opens in the Search mode. Click **New request**.
4. For **Status**, select **Enabled**.
5. In the **Company** field, select **Calbro Services**.
6. In the **Module Name** field, select **Incident**.
7. Click **Save**.
8. Click **New request**.
9. Repeat steps 5 – 8 to create Notification record for module – **Infrastructure Change**.

   The notifications for the Incident and Infrastructure change modules are enabled, and the user will receive the respective notifications.

Lab 6.2: Creating Categories

In this lab, you will create product categories with more advance settings using the Custom Configuration tab.

Task 1: Create Product Category

Steps:

1. Log in to the BMC Remedy Mid Tier as appadmin (**appadmin/password**).

   Note: If prompted to change the password, enter the new password as **Password**. Click **OK** and then select the **don't remind me** check box.
2. From the Application Administration Console's **Custom Configuration** tab, select **Foundation** > **Products / Operational Catalogs** > **Product Catalog**. Next, you will use some of the search functionality to restrict the data shown, and also to compare using different types of searches.

   (**Hint**: *Always enter as much data as possible, when performing a search. On a production system, there may be thousands of entries to search.*)
3. On the **Product Catalog Setup** form, click the **Product Category** tab.
4. On this tab, click **Create**. The **Product Category Update** dialog box appears.
5. Create the AnyITDoc Software product, using the data in the below table.

   (**Hint**: *When creating or updating a record, always check each field's list to determine if you can select the specified value first, before typing in a new value. If the value exists in the list, select it, instead of typing it in the field.*)

Field / Area	Product Catalog Data – AnyITDoc Software
Product Type	Software

CI Type	Product
Categorization Tier 1	Software
Categorization Tier 2	Application
Categorization Tier 3	Third Party
Product Name	AnyITDoc Software (***Hint**: You may type in new information not already on the menu*).
Manufacturer	**BMC Software, Inc.**

6. Click **Save**.
7. Click **OK** and close the dialog box.
8. Now, search for your new product catalog entry by specifying detailed search criteria.
9. Select the **AnyITDoc Software** entry in the table, and continue creating the product catalog entry by entering the data specified in the below table, on the appropriate tabs and fields.

Field / Area/Tab	Product Catalog Data – AnyITDoc Software
Product Alias	ITDocsof
Product Model/Version	1808
Product Model/Version State	General Availability
General Avail Date	11/04/2019 **Note**: To update year, click in the year field and press the Delete key.
Status	Enabled
Requires Contract	No (**Hint**: *Scroll down and click **Save**.*)
Patch – Status	Enabled
Patch Last Build ID	18081

10. View the data in the **Company and Module Relationships** table. Verify that the below data has already been completed by default, and, update as necessary.

Note: Setting **Approved Product** and **Approved Version** to **Yes** ensures that the product is added to the DML (or DHL).

Field / Area/Tab	Product Catalog Data – AnyITDoc Software
(**Hint**: *On the **Product Company Association** tab, click **View**.*) **Related to (Modules)** **Approved Product**	 All Service Support Modules Yes

(**Hint**: *On the **Version Company Association** tab, click **View**.*) **Approved Version**	Yes
(**Hint**: *On the **Patch Company Association** tab, click **View**.*) **Approved Patch**	Yes

Task 2: Create Operational Category

1. From the Application Administration Console's **Custom Configuration** tab, select **Foundation** > **Products / Operational Catalogs** > **Operational Catalog**.
2. On the **Operational Catalog Setup** form, click **Create** in the **Operational Category** section.
3. Using the below table, create the following entry.

Field / Area	Operational Catalog Data
Operational Categorization Tier 1	Upgrade
Operational Categorization Tier 2	Hardware
Operational Categorization Tier 3	Scanner
Status	Enabled

4. Click **Save.**
5. Click **OK**.
6. Click **Close**.
7. Close the **Operational Catalog Setup** form.
8. Log out of BMC Remedy Mid Tier.

Task 3: Verify Your Work

Steps:

1. Log in to the Smart IT Universal Client as Bob Baxter (User name: **Bob** and Password**: password**).
2. Click **Create New** > **Incident**.
3. Fill in the following details:
   - Customer Name = **Mary Mann**
   - Summary = **Printer not working**
4. For **Product Category**, click **Browse Categories.**
5. Specify the following details:
   - First drop-down = **Software**
   - Second drop-down = **Application**
   - Third drop-down = **Third Party**

- Fourth drop-down = **AnyITDoc Software**
- Fifth drop-down = **1808**

6. For **Operational Category**, click **Browse Categories.**
7. Specify the following details:
   - First drop-down = **Upgrade**
   - Second drop-down = **Hardware**
   - Third drop-down = **Scanner**
8. Close the record without saving and log out.

Lab 6.3: Managing Access to Tickets and Resources in Smart IT/Data Access Model

Exercise 1: Impact of RLS on Access to Tickets and Resources

Note: No relationship to Application Licenses.

In BMC Remedy ITSM and Smart IT, access to ticket data is restricted only to users who are directly connected to the ticket or to a support group associated with the ticket. In this Lab, you will validate the row-level security that helps restrict the ticket access.

Role/Group	Name	Can Access Ticket
Customer	**Amy Asset**	Yes
Direct Contact	Sanjay Service	Yes
Submitter	**Sammy Support** ***This will not be validated in this lab.***	Yes
Assigned Support Group	**Systems Group**	Yes
Assignee	**Simon Systems**	Yes
Another Support Group	Facilities Group	No
Support Staff from Another Support Group	Frank Facilities	No

Task 1: Create an Incident

Steps:

1. Log in to the Smart IT Universal Client as Sammy Support (**sammysupport/password)** from **AnyITSMCompany**.
2. Click **Create New** > **Incident** with the following details:

Field / Area	Data

Customer	Amy Asset (*Type the first few letters and then select the result from the list.*)
Contact	Sanjay Service (*Type the first few letters and then select the result from the list.*)
Summary	Laptop not working
Support Group	AnyITSMCompany > IT Support > Systems Group
Assigned To	Simon Systems

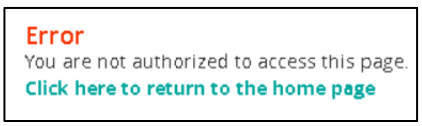
3. Click **Save Ticket**.
4. Note down the incident ID as you will need to perform the search while you validate the row-level security.

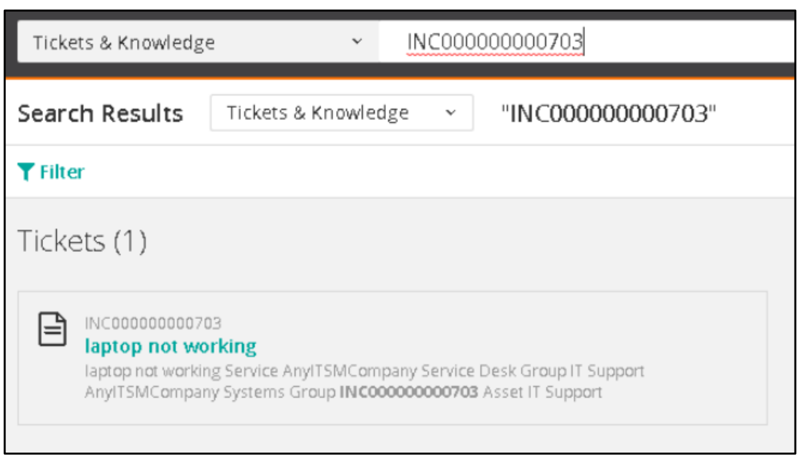
Task 2: Verify Access to the Incident

Steps:

Log in to the Smart IT Universal Client as following users and verify if they can view the newly created incident.

Note: You cannot edit the incident as that needs extra permissions. If you try to edit, you will the following error message:



<table>
<tr><th>User Name</th><th>User Name/Login ID</th><th>Password
(all in lowercase)</th><th>Can Access Ticket</th></tr>
<tr><td>Amy Asset
(Customer)</td><td>amyasset</td><td>password</td><td>Yes</td></tr>
<tr><td colspan="4">Note: Using Global Search, enter the Incident ID and search for related tickets and knowledge.


In addition, to verify this feature, try searching for any other incident, such as INC000000000701, 702, and so on, and compare the results.</td></tr>
<tr><td>Sanjay Service
(Contact)</td><td>sanjayservice</td><td>password</td><td>Yes</td></tr>
</table>

Simon Systems (Assignee)	simonsystems	password	**Yes**
Frank Facilities (From other Support Group)	frankfacilities	password	**No**

Exercise 2: Impact of Hierarchical Groups on Access to Tickets and Resources

In this lab, you will define hierarchical group to roll up or extend the data access. For this, you will configure a parent group to the existing support groups. Create and add a user and associate it to the parent group.

Task 1: Create Support Group and User

Steps:

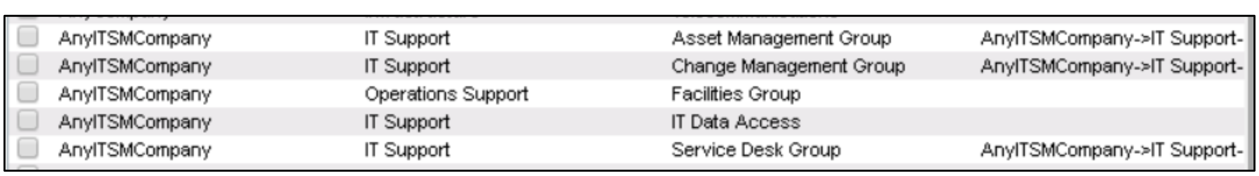
1. Log in to the BMC Remedy Mid Tier as Allen Allbrook (**Allen/password**).
2. In the **Applications** list, click **Administrator Console** > **Application Administration Console**.
3. From the **Configuration for Company** field, select **AnyITSMCompany**.
4. For **Step 3 Support Group**, click **Create**.
5. In the **Support Group** dialog box, for **Support Organization**, select **IT Support**.
6. Click in the **Support Group Name** field.
7. Type **IT Data Access**.
8. Click the **Support Group Role** drop-down arrow.
9. From the **Support Group Role** list, select **Line of Business**.
10. Click **Add**.
11. Click **OK**.
12. Click **Close**.
13. Now, to add a new user, for **Step 4 People**, click **Create**.
14. With the following required details, create the new user:
    - First Name: **Anton**
    - Last Name: **ITManager**
    - Support Staff: **Yes** (Click **OK**)
    - Company: **AnyITSMCompany**
    - Site: **England Group Services**
    - Login ID: **antonitmanager**
    - Password: **password**
    - License Type: **Fixed**
    - User Permission:
      - Incident > Incident User (Fixed license)
      - Request > Service Request User
15. Update the support group for **Anton ITManager**. Click the **Support Groups** tab.
16. Click **Update Support Groups and Roles**.

17. Select the following values on the **Support Group Update** tab:
    - Company: **AnyITSMCompany**
    - Support Organization: **IT Support**
    - Support Group: **IT Data Access**
    - Relationship Role: **Member**
18. Click **Add**.
19. Click **Close**.
20. On the **People** form, click **Add**.
21. Re-enter the password to confirm.
22. Click **OK**.
23. Again, click **OK**.
24. Click **Close**.

Task 2: Define Hierarchical Group Configuration

Steps:

1. On the **Application Administration Console** page, click the **Custom Configuration** tab.
2. In the **Application Settings** section, select **Foundation** > **Advanced Options** > **Hierarchical Group Configuration**.
3. Click **Open**.
4. As you want to define hierarchy for the support groups, for **Select Parent Group For**, click the **Support Group** option.
5. The following three **AnyITSMCompany** support groups will be child groups for **IT Data Access**. Select these groups.
    - Change Management Group
    - Asset Management Group
    - Service Desk Group
6. For **Set Parent Group Type**, scroll down and select the **Support Group** option.
7. Click the **Parent Group Name** drop-down arrow.
8. From the list select, select **AnyITSMCompany** > **IT Support** > **IT Data Access**.
9. Click **Save**.
10. Click **OK**. You can now see that for all the three selected support group records, a value appears in the **Parent Group Name** column. To view the full value, rest your mouse pointer on the entry in the **Parent Group Name** column.



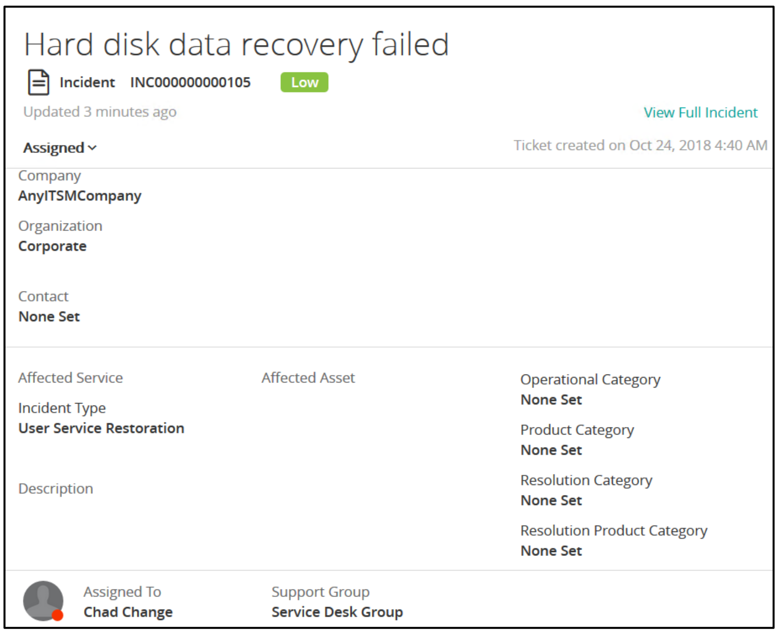
AnyITSMCompany	IT Support	Asset Management Group	AnyITSMCompany->IT Support-
AnyITSMCompany	IT Support	Change Management Group	AnyITSMCompany->IT Support-
AnyITSMCompany	Operations Support	Facilities Group	
AnyITSMCompany	IT Support	IT Data Access	
AnyITSMCompany	IT Support	Service Desk Group	AnyITSMCompany->IT Support-

11. Log out of Remedy Mid Tier.

Task 3: Verify Your Work

Steps:

1. Log in to the Smart IT Universal Client as Anton ITManager (**antonitmanager/password**).
2. Click the **Global Search** icon in the upper-right area of the screen.
3. In the Search field (for Tickets & Knowledge), type **"hard disk data recovery"** and press **ENTER**. This is a part of the summary for two incidents assigned to Service Desk Group support group.
4. Two records appear in the results area. Scroll-down the record and verify that this incident is assigned to **Service Desk Group**. As **IT Data Access** is the parent group for this assigned group, thus Anton ITManager who belongs to only IT Data Access support group is able to view this incident.



5. Log out of Smart IT Universal Client.

Lab 6.4: Configuring File Attachments

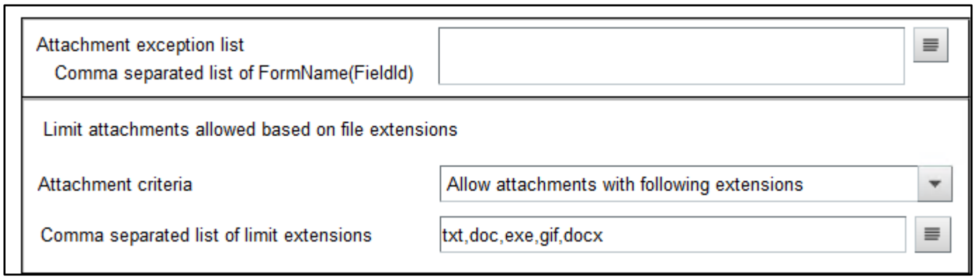
Task 1: Configuring File Types and Size

Steps:

1. Log in to Remedy Mid Tier as Allen Allbrook (**Allen/password**).
2. From the IT Home page, select **Applications** > **AR System Administration** > **AR System Administration Console.**
3. Select **System** > **General** > **Server Information**.
4. The **AR System Administration: Server Information** form is displayed.
5. On the **Attachment Security** tab, go to the **Attachment Criteria** list, and select **Allow attachments with following extensions**.

6. In the **Comma separated list of limit extensions** field, enter names of file extensions that are supported for this lab testing.

   txt,doc,exe,gif,docx



7. On the **Configuration** tab, in the **Max Attach Size** field, specify **1024** maximum file size.

   Note: File size is set to KB. So in this case a file of less or equal 1024 KB can be attached.
8. Click **Apply**.
9. Click **OK**.
10. Restart the **BMC Action Request System** and **Smart IT** services.

Task 2: Verify Your Work

Steps:

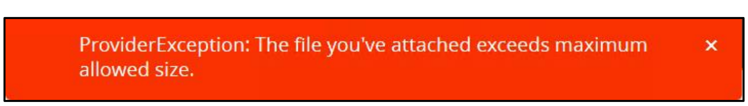
1. Log in to the Smart IT Universal Client as Allen Allbrook (**Allen/password**).
2. Open an Incident ticket.
3. In the **Activity** panel on the right, click inside the **Add a note** field.
4. Click the attachment, paper pin, icon.
5. Select and add the PDF file, **AttachmentFileTesting.pdf**, from the following path **Desktop\Student Resources\Module_6\Lab 6.5**.

   You get the message that **file type not allowed**.

6. Close the message.
7. Now add the text file, **AttachmentFileTesting2.txt,** which is placed in the same resources folder. This file will be attached and appear just below the Add a note field.
8. Again, click the attachment, paper pin, icon.
9. Select and add the **SizeMore.txt** from the following path:

   Desktop\Student Resources\Module_6\Lab 6.5.

   This file will be attached and appear just below the **Add a note** field.
10. Add a test message in the **Add a note** field.
11. Click **Post**. Error message appears informing that the attached file exceeds the maximum allowed size.



12. Delete the **SizeMore.txt**.
13. Click **Post**.
14. The **AttachmentFileTesting2.txt** file appear in the Activity panel.

Module 7: Rebranding BMC Remedy with Smart IT

Objectives

- Rebrand Smart IT for the Universal Client

Lab 7.1: Rebranding Smart IT for the Universal Client

You can rebrand the BMC Remedy with Smart IT (Smart IT) Universal Client for your IT staff. Basic CSS editing knowledge is required for this procedure.

Task 1: Create the Required Folder

Steps:

1. Navigate to the following folder location:

   C:\Program Files\Apache Software Foundation\Tomcat7.0_SmartIT\webapps

2. Create a folder named as **tenant-custom-res**.
3. In the **\tenant-custom-res** folder create a sub folder named as **000000000000001**. The folder name given here is the master tenant ID.

Task 2: Verify the Graphic Files and Customize Styling in the Smart IT Universal Client

Steps:

1. On the Windows desktop, locate the following folder location:

   \Students Resources\Module_7\Lab 7.2

2. Verify you have the following files in this folder. Open the files to look at the graphics to ensure later that these graphics appear on the Smart IT Universal client login page.

File	Purpose
custom_logo.png	Login Screen background header
header_logo.png	Application header image
login_bg_1.png login_bg_2.png login_bg_3.png login_bg_4.png	Login background that rotates

Note: All images to be used for rebranding Smart IT must be included in the tenant folder **000000000000001**.

3. Copy all the six graphic files and one **style-smart-it.css** file.
4. Navigate to the following folder location and paste all the files.

   C:\Program Files\Apache Software Foundation\Tomcat7.0_SmartIT\webapps\tenant-custom-res\000000000000001

Task 3: Rebrand the Login Screen

Steps:

1. In the **C:\Program Files\Apache Software Foundation\Tomcat7.0_SmartIT\webapps\tenant-custom-res\000000000000001** folder, right-click the **style-smart-it.css** file, and select **Edit with Notepad++.**
2. Verify that the following code is contained in the first lines of the file:

```
.login-body.bgr-1 {
background-image: url("login_bg_1.png");
}
.login-body.bgr-2 {
 background-image: url("login_bg_2.png");
}
.login-body.bgr-3 {
 background-image: url("login_bg_3.png");
}
.login-body.bgr-4 {
 background-image: url("login_bg_4.png");
}
```

Note: These lines will change the background images for your login page.

3. Verify that the following code is specified in the file:

```
 .login-form__logo-bmc {
 background: url("custom_logo.png") no-repeat;
width: auto;
}
```

Note: These lines will change the login screen background header.

Task 4: Rebrand the Application

Steps:

1. To change the color of the app name, verify that the following code is there in the file:

```
.header__app-name {
width: 240px;
```

```
margin: -1px 20px 0 0;
color: #f1b30d;
font-size: 24px;
float: left;
}
```

2. To change the header logo, verify that the following code is in the file:

```
.header__logo {
 width: 80px;
 height: 27px;
 float: left;
 margin-top: 11px;
 background: url("header__logo.png") no-repeat;
}
```

3. To change the color of the thin border line under the Menu bar, verify that the following code is in the file:

```
.header__fadeline-bottom {
 width: 100%;
 height: 2px;
 background: #0df1d2;
}
```

4. Close the file.
5. Restart the **Smart IT Application** service.

Note: The newly created css file will override the default Smart IT styling after the Tomcat service is restarted.

Task 5: Verify the rebranding

Steps:

1. Launch a browser and from the available bookmarks, click **Smart IT Universal Client 18.08**.

Note: It might take a few moments to start up after service restart.

2. Verify that one of the four background images loaded successfully. To view other images, keep refreshing the web page.
3. Verify that the new BMC logo is displayed above the **User Name** field.
4. Log in to the Smart IT Universal Client as Allen Allbrook (**Allen/password**)
5. Verify that the BMC logo, the application name, and the thin Menu bar border colors have changed.
6. Log out of the Smart IT Universal Client.
7. Close all open browser windows.

Task 6: Remove the BMC Custom Smart IT Branding Folder

Steps:

1. Using Windows File Explorer, navigate to the **C:\Program Files\Apache Software Foundation\Tomcat7.0_SmartIT\webapps** folder.
2. Right-click the **tenant-custom-res** folder, and select **Cut**.
3. Right-click your Windows desktop, and select **Paste**.
4. Verify that the folder is now located on your desktop.
5. Close Windows File Explorer.

Module 8: BMC Remedy with Smart IT Troubleshooting and Tunning

Objectives

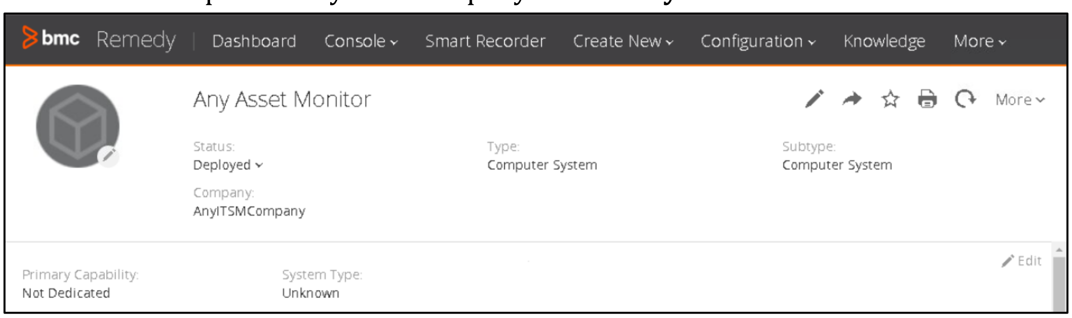
- Perform the steps to resolve the common issues faced while working with Smart IT

Lab 8.1: General Troubleshooting

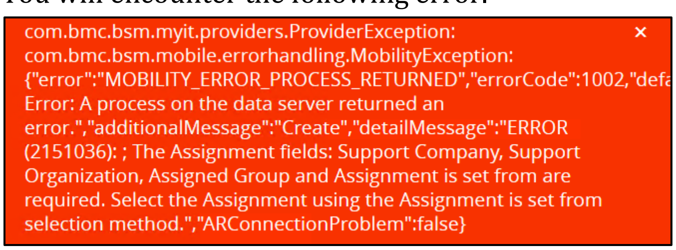
Task 1: Troubleshooting the Error When Creating an Outage in the Universal Client

As Allen, perform the validation in Smart IT before stating the lab to identify the error.

- Search for and open an AnyITSMCompany asset – **Any Asset Monitor**.



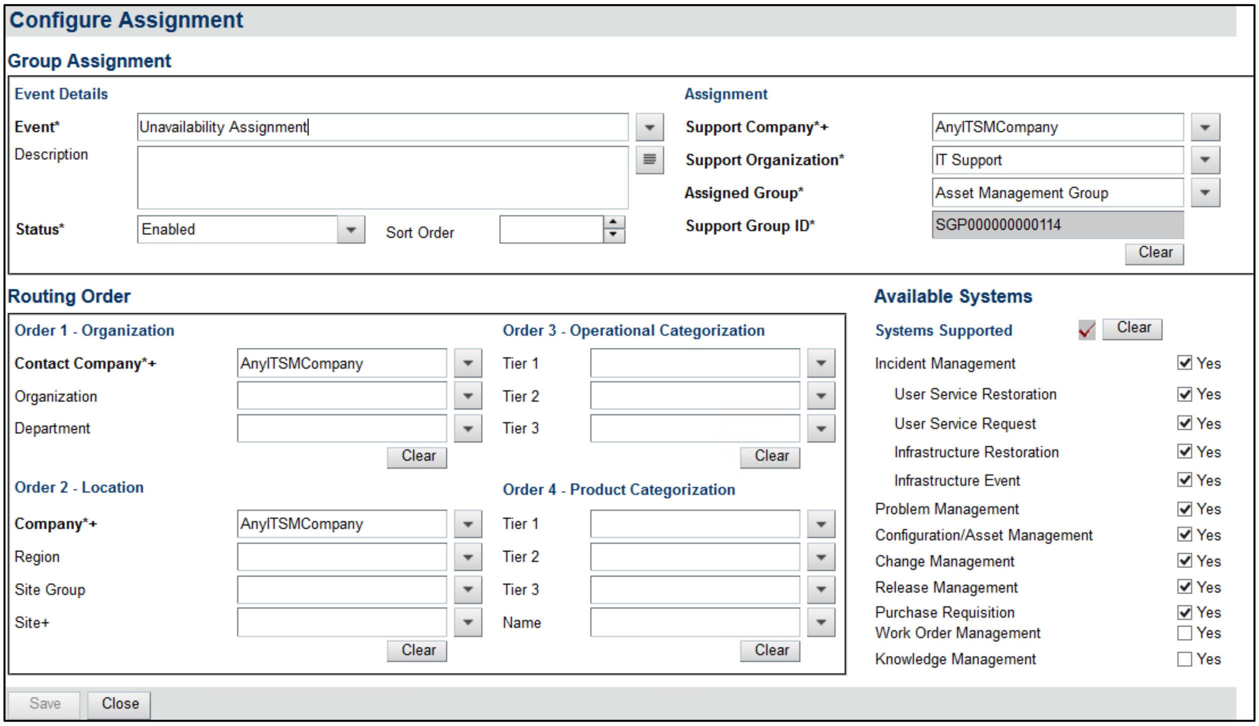
- On the **Outages** tab, add an outage to the asset.
- Save the outage.
- You will encounter the following error.



Steps:

1. Log in to BMC Remedy Mid Tier as Allen (**Allen/password**).
2. From the Application Administration Console's **Custom Configuration** tab, select **Foundation** > **Configure Assignment** > **Configure Application Assignment**.

3. Click **New Request**.
4. Define the following assignment for the **Unavailability Assignment** for AnyITSMCompany:



5. Now, in Smart IT, open the Asset that you used to verify the error.
6. On the **Outage** tab, add an outage to this Asset.
7. Save the outage. This time you should not get any error and define outage appears on the Outage tab.

Lab 8.2: Tuning Performance

Task 1: View the Recommendations for Global Search - Smart IT Database

Steps:

1. Log in to Remedy Mid Tier as Allen (User name: **Allen** and Password: **password**).
2. From the **Applications** tab, navigate to the **AR System Administrator** > **AR System Administrator Console**.
3. Click **System** > **General** > **Centralized configuration**.
4. On the **AR System Configuration Generic UI** form, click the **Component Name** drop-down arrow.
5. From the list, select **com.bmc.arsys.smartit** > *.

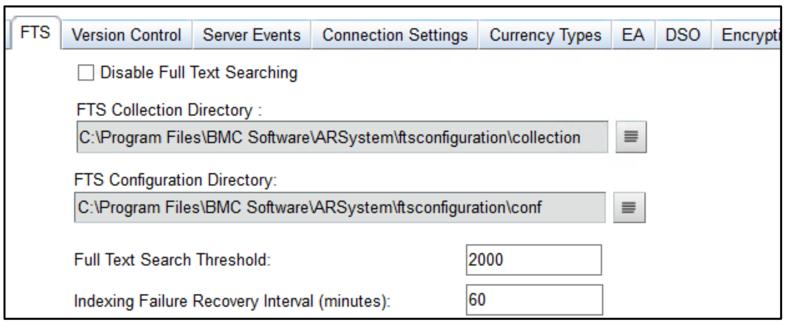
Note: "*" is a global level configuration and is applicable to all servers in the server group.

6. Scroll down in the list till you find **isExclude_TAG_and_CI_ID** and **useLeadingSearchForAsset** parameters.
7. Ensure that the value for the both the parameters is set to **true**.

Task 2: Set the FTS Threshold

Steps:

1. On the **AR System Administrator Console**, select **System** > **General** > **Server Information.**
2. Click the **FTS** tab. The **Full Text Search Threshold** field displays 10000, which is the default value.
3. Change it to **2000**.



4. Click **Apply**.

Task 3: Set BMC Remedy ITSM MSSQL Indexes to Improve Performance for Ticket Console

Steps:

1. From the Windows task bar, click the **BMC Remedy Developer Studio** icon .
2. In the **Workspace Launcher** dialog box, click **OK**.
3. Log in with the AR System Administrator credentials (User name: **Demo**, no password required).
4. Verify that the application is running in the correct mode by looking in the lower-right corner of the application window and verifying that it says **Best Practice Customization Mode**.

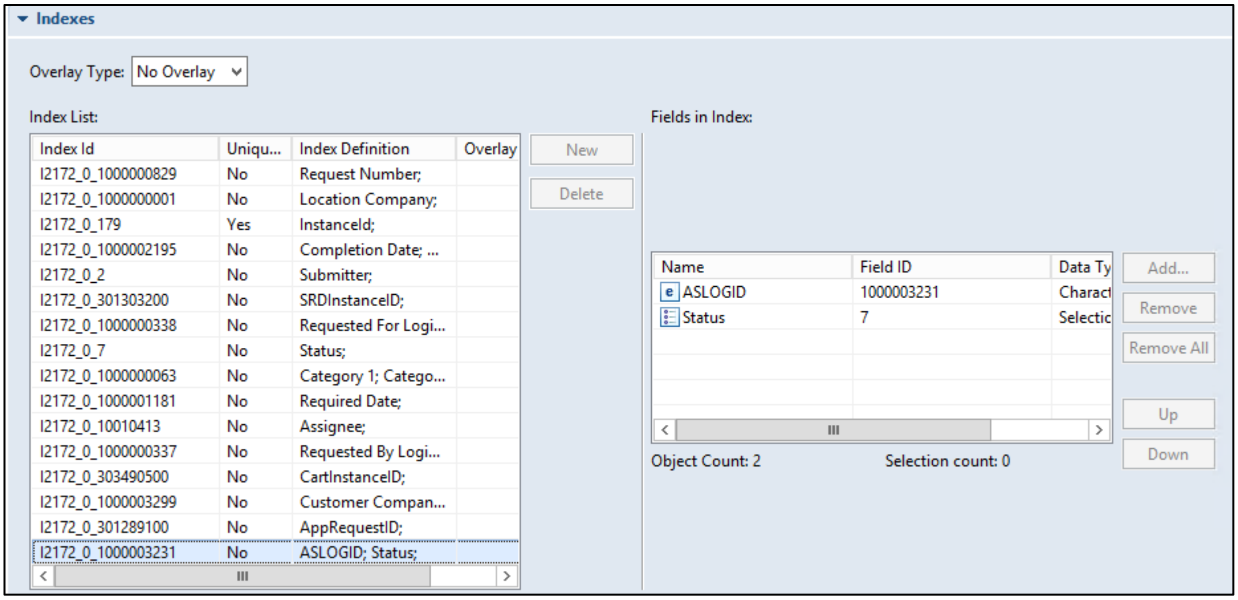
Note: Best Practice Customization Mode enforces the use of Overlay objects so your customizations are preserved during an upgrade.

5. From the **AR System Navigator** panel, expand the options by clicking the arrow next to **localhost**.
6. Similarly, expand **All Objects** options.
7. Double-click **Forms**. The Forms panel will open.
8. Search for the **SRM:Request** form and the **WOI:Workorder** form.
9. Verify that the composite index is set to composite index **1000003231_1**. (*Hint: click the Definitions tab and expand indexes as shown in the screenshot below*.)

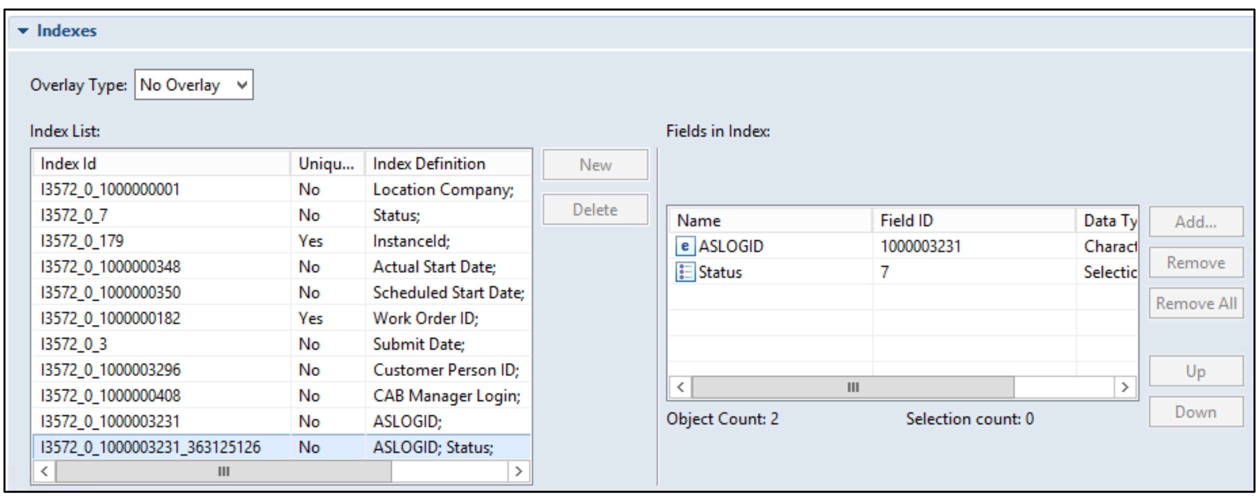
Form	Column position	Field ID	Field name
SRM:Request	1	1000003231	ASLOGID
	2	7	STATUS

WOI:Workorder	1	1000003231	ASLOGID
	2	7	STATUS

SRM:Request



WOI:Workorder

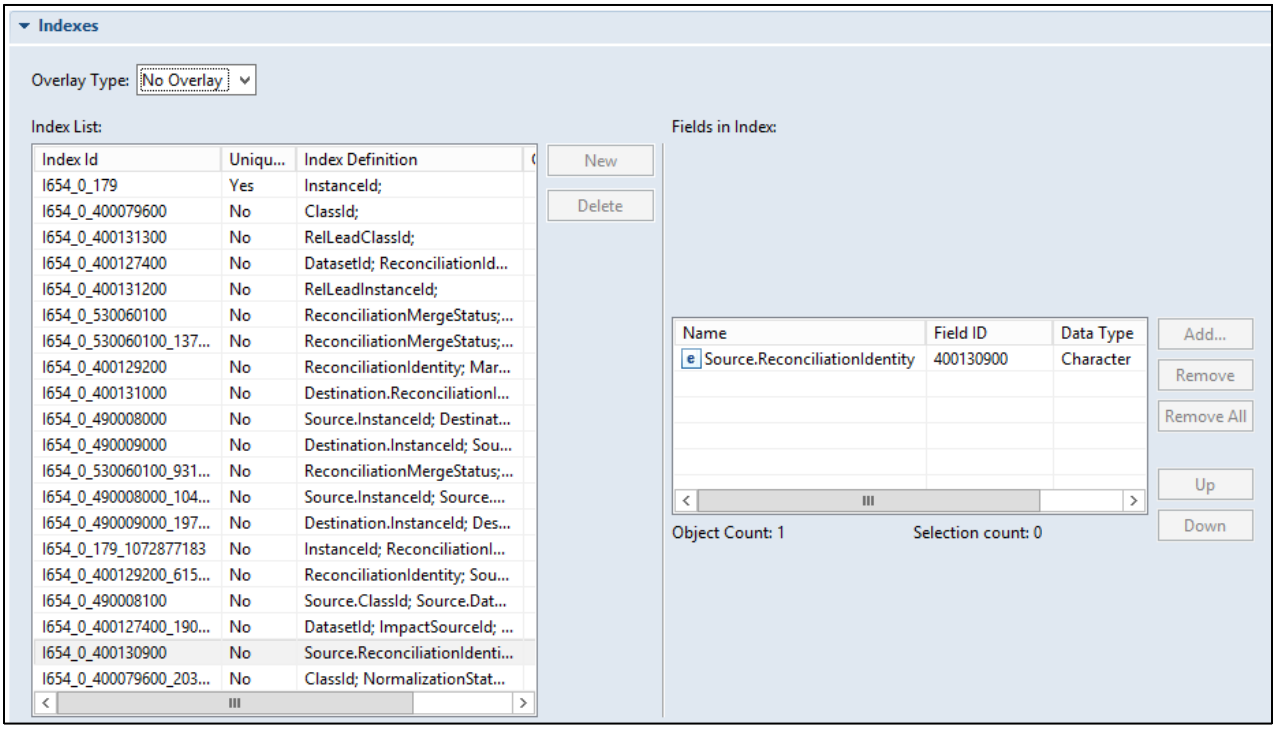


Task 4: Set BMC Remedy ITSM MSSQL Indexes to Improve Performance for Asset Details

Steps:

1. Search for the **BMC.Core:BMC_BaseRelationship** form.
2. Verify that the index is set **C400130900_1**.

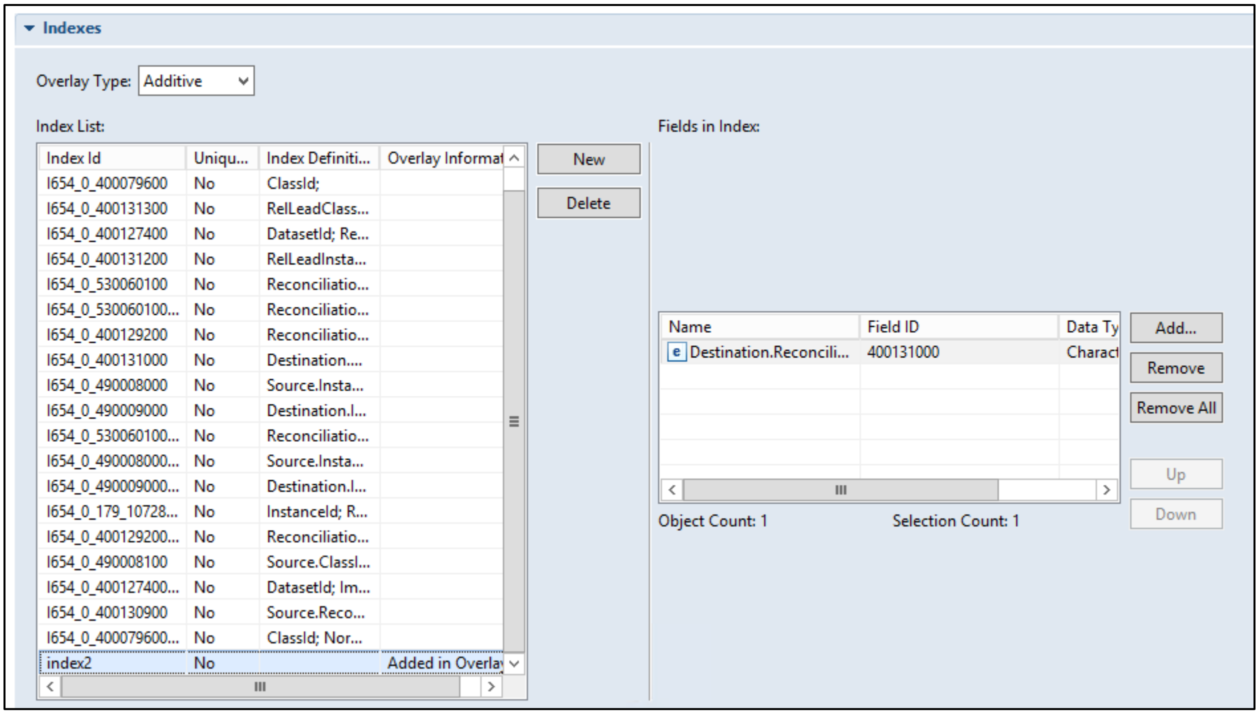
Form		**Column position**	**Field ID**	**Field name**
Verify the Index				
BMC.Core:BMC_BaseRelationship		1	400130900	Source.ReconciliationIdentity



3. Set the index for **Destination.ReconciliationIdentity**.

Form	**Column position**	**Field ID**	**Field name**
Create the Index			
BMC.Core:BMC_BaseRelationship	1	7	Destination.ReconciliationIdentity

- Create overlay of the **BMC.Core:BMC_BaseRelationship** form.
- On the Definitions tab, for Indexes, set Overlay Type to **Additive**.
- In the **Index List** area, click **New**.
- In the **Fields in Index** area, click **Add**.
- Search for and add the **Destination.ReconciliationIdentity** field.
- Save the details.



Task 5: Set BMC Remedy ITSM MSSQL Indexes to Improve Performance for Collision and Calendar Request

Steps:

1. Search for the **CHG:Infrastructure Change** form.
2. Create overlay of the **CHG:Infrastructure Change** form.
3. On the **Definitions** tab, for **Indexes**, set **Overlay Type** to **Additive**.
4. In the **Index List** area, click **New**.
5. In the **Fields in Index** area, click **Add**.
6. Search for and add the **Scheduled End Date** field.
7. Save the details.