

CA Clarity™ PPM

CA Clarity Service Connect Product Guide - On Premise

Version 02.0.00



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CA Technologies Product References

This document references the following CA Technologies products:

- CA Technologies Clarity Service Connect

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Chapter 1: CA Technologies Clarity Service Connect Overview

This section contains the following topics:

[About CA Technologies Clarity Service Connect](#) (see page 7)

[How the Incident Process Flow Works](#) (see page 7)

[CA Clarity PPM Remedy Administrator User](#) (see page 8)

[CA Clarity PPM Remedy Administrator Access Rights](#) (see page 8)

About CA Technologies Clarity Service Connect

CA Technologies Clarity Service Connect is an add-in you can use to connect CA Clarity PPM with BMC Remedy Service Desk (Remedy). The primary objective of this add-in is to transfer cases from a Remedy server to a CA Clarity PPM server as incidents where they can be costed with effort charged back to the customer, or transformed into tasks and projects, if necessary.

Transfer cases from Remedy into CA Clarity PPM to:

- Track internal service requests. CA Clarity PPM can help you understand how those requests impact IT resources and the investments supported by those resources.
- Track and predict the incident-related costs of investments and projects managed in CA Clarity PPM.
- Monitor investment health by tracking the volume and severity of incidents.
- Manage the allocation and assignment of resources that work on unplanned incidents.
- Convert incidents into planned project work in CA Clarity PPM.
- Use one system to track the time and effort associated with IT resources, regardless if it is an incident or project work.

How the Incident Process Flow Works

The following process describes the flow of an incident through the default lifecycle:

1. The requestor submits a request in Remedy. The request becomes a Help Desk case and is routed to the appropriate assignee.

2. The assignee works on the case in Remedy and updates the record with information that is discovered during the troubleshooting process. When complete, the assignee sets the case status to "Closed".

See the BMC Remedy Service Desk documentation for more information on how to work on Remedy cases.

3. [The Execute Process job is scheduled to run.](#) (see page 19)
4. The incident manager opens and views the incidents in CA Clarity PPM, where they can be charged back to the customer, or otherwise have costs associated with them.

See the *Demand Management User Guide* for more information.

CA Clarity PPM Remedy Administrator User

The Remedy Administrator is a new CA Clarity PPM user included with and used by the CA Technologies Clarity Service Connect add-in. This user is included with the Remedy Admin User role. Any CA Clarity PPM user can be granted the appropriate rights to fill this role.

The Remedy Admin User role includes the following attributes:

First Name

The first name of the Remedy Administrator user.

Default: Remedy

Last Name

The last name of the Remedy Administrator user.

Default: Administrator

Full Name

The full name of the Remedy Administrator user.

Default: Remedy Administrator

Login Name

The login name of the Remedy Administrator user.

Default: remedyadmin

Email Address

The email address of the Remedy Admin user used by the process to send administrative messages.

CA Clarity PPM Remedy Administrator Access Rights

The CA Clarity PPM Remedy Administrator access right includes:

- Access to process administration with read/write access to the Default Remedy Clarity Integration Process.
- Access to the processes page to start new instances of the Default Remedy Clarity Integration Process.
- Access to the reports and jobs page with ability to schedule a process using the Execute Process job function.
- Access to the incidents page and the ability to work with any Incidents assigned by the process.

Chapter 2: Setup and Installation

This section contains the following topics:

[How to Set up the CA Technologies Clarity Service Connect Add-in](#) (see page 11)

[How to Set up Remedy for Connection to CA Clarity PPM](#) (see page 11)

[Install the CA Technologies Clarity Service Connect Add-in](#) (see page 15)

[The Default Remedy Clarity Integration Process](#) (see page 15)

How to Set up the CA Technologies Clarity Service Connect Add-in

The following steps describe the overall process of setting up the CA Technologies Clarity Service Connect add-in:

1. [Set up Remedy](#) (see page 11).
2. [Install the add-in](#) (see page 15).
3. [Configure the process](#) (see page 16).
4. [Run the process or schedule the process to run on a schedule](#) (see page 19).

How to Set up Remedy for Connection to CA Clarity PPM

You must install Remedy on top of the basic BMC Remedy Action Request system. CA Clarity PPM connects with Remedy using Web Services, which means that you must also install the Remedy Mid-Tier application.

See the Remedy documentation for more information on BMC Remedy Action Request and the Mid-Tier application.

Use the following process to set up Remedy for connection to CA Clarity PPM:

1. [Create a new Remedy Web Service query operation](#) (see page 11).
2. [Define the required query filter criteria](#) (see page 12).
3. [Select the data fields returned by Remedy Web Service](#) (see page 13).

Create New Remedy Web Service Query Operations

Remedy includes some default Web Services. However, these are basic services meant to be configured to include the filter criteria and data required by the client application.

For example, CA Clarity PPM must filter using Remedy's Status field, which is not possible using stock Remedy Web Services. To accomplish the task of filtering, create a new Web Service query operation that can take a generic filter argument, and output all the fields required by CA Clarity PPM.

Follow these steps:

1. Open the Remedy Administrator.
2. In the object tree, click the Web Services node.
3. Double-click HelpDesk_Query_Service.
4. Under Operations, click New.
5. Complete the following fields:

Name

Enter GetFilteredList.

Type

Select Get.

6. When prompted to map object changes, select Replace current mappings.

Define the Web Service Query Filter Criteria

Follow these steps:

1. Open the Remedy Administrator.
2. Click Input Mapping.
3. On the right panel, click on the root node, select New, and then Element.
A new node called element appears.
4. Click the element node.
The node opens.
5. In the Name field, enter Filter.
6. Look in the Object Properties window to make sure that the data type for this element is string (the default value).
7. Right-click the Case_ID element and select Cut to remove it.
8. Click OK.

The input mapping window opens.

9. On the Operations List, define the following field:

Qualification

Enter XPATH(/ROOT/Filter), where XPATH(/ROOT/Filter) is a fully dynamic qualification filter that allows the service client (CA Clarity PPM) to filter on any field.

Select the Data Fields Returned by Remedy Web Service

Follow these steps:

1. In the Remedy Administrator, click Output Mapping.
2. On the right panel, under ROOT, create the following elements:

Estimated_Total_Time

Type: int

Mapped to (left panel): Estimated Total Time

3. Continue to create the following additional elements:

Total_Time_Spent

The element on right panel.

Type: int

Mapped to (left panel): Total Time Spent

Resolved_Time

The element on right panel.

Type: dateTime

Mapped to (left panel): Resolved Time

Request_Impact

The element on right panel.

Type: string

Mapped to (left panel): Request Impact

Modified_Time

The element on right panel.

Type: dateTime

Mapped to (left panel): Modified Time

4. Click Map.

The elements are linked.

5. Click OK.
6. Save the changes.

The Web Service is now ready for CA Clarity PPM.

rem:timestamp - Generating Remedy Web Service Time Values

Remedy Web Service takes some data in its own format; use the rem:timestamp tag to simplify date conversions.

mode

Required. This can be "DATE_TO_LONG" or "FORMAT_TIMEZONE".

In Remedy, when a date, including time, is to be used as a query condition, instead of: `date > to_date("2005-01-2 12:23:12")`

Remedy uses: `date > 10234420304`

This provides the number of seconds since midnight of Jan. 1st, 1970. Use `mode="DATE_TO_LONG"` to get a number that is based upon a date.

In Remedy, when a date is obtained from a web service, it exists in the following format: 2005-04-01T13:44:12-08:00, where "-08:00" at the end specifies the time zone and can only be understood by SimpleDateFormat (which is used in the `<gel:parseDate>` tag). Use `mode="FORMAT_TIMEZONE"` to generate a date string that is understandable by `<gel:parseDate>`.

Type: String

var

Required. The variable referred by this name contains the result:

- If `mode="DATE_TO_LONG"`, it is a Long.
- If `mode="FORMAT_TIMEZONE"`, it is a string.

Type: String

value

Required. The value to be converted:

- If `mode="DATE_TO_LONG"`, it is a date.
- If `mode="FORMAT_TIMEZONE"`, it is a string.

Type: Expression

Example

```

<rem:timestamp var="LastRemedyIncidentTime1" value="{LastRemedyIncidentTime}"
mode="FORMAT_TIMEZONE"/>
    <gel:parseDate dateVar="RDate" stringVar="LastRemedyIncidentTime1"
format="yyyy-MM-dd'T'HH:mm:ssZ"/>
    <rem:timestamp var="RemedyTime" value="{RDate}" mode="DATE_TO_LONG"/>

```

Install the CA Technologies Clarity Service Connect Add-in

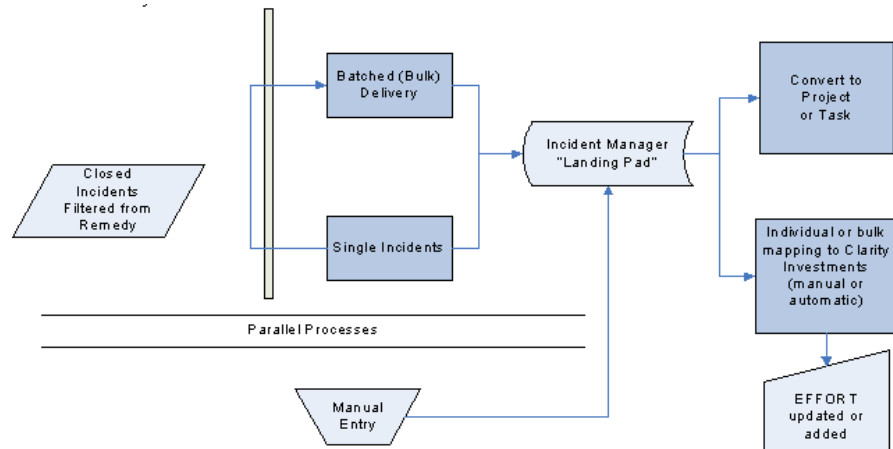
Prerequisites

- New must have CA Technologies Clarity r8.1.0 or CA Clarity PPM v12.0.0 installed before installing the add-in.
- Existing CA Clarity PPM customers must have CA Clarity PPM r8.1.0 installed. If not, you must upgrade to CA Clarity r8.1.0 or CA Clarity PPM v12.0.0 before you download and install the add-in.

For instructions on how to install an add-in, see the *Installation Guide*.

The Default Remedy Clarity Integration Process

The Default Remedy Clarity Integration Process is included with this add-in. This process is built on the philosophy that you do your work in one place (that is, Remedy) and cost it in another (that is, CA Clarity PPM).



This process transfers cases from Remedy into CA Clarity PPM as incidents only after the assignee changes the case status to "Closed". If the assignee subsequently changes the case, you can run the process to transfer cases to CA Clarity PPM again. However, once a case is transferred to CA Clarity PPM, effort or changes you make to the case in Remedy are not tracked in CA Clarity PPM.

Fault Handling During Connection

You can incur errors during the connection and transfer of cases from Remedy to CA Clarity PPM incidents. The following is a list of possible errors and how the Default Remedy Clarity Integration Process process handles them:

- The Remedy resource attached to the incoming case does not exist in CA Clarity PPM.

Handling: The incident is created and assigned to the Remedy Admin user. A message is logged in the process context. All such messages are mailed in a single batch to the Remedy Administrator.

- The Remedy category attached to the incoming case does not exist in CA Clarity PPM.

Handling: A new incident category is created with the specified name. A warning message is logged that states that the new category was created.

- Generic incident XOG error.

Handling: The error is logged and the CA Clarity PPM incident is not created or updated.

Configure the Default Remedy Clarity Integration Process

This Default Remedy Clarity Integration Process is designed to be useful and appeal to the widest possible audience. However, your company likely has unique requirements. You can configure this process to meet your company's needs.

You must configure the Default Remedy Clarity Integration Process to operate in your environment. To facilitate custom action process development, you can modify custom action scripts while the process is in Active mode or running.

Note: It is recommended that you save a copy of the process before configuring it so that you can later restore the process settings. To do this, click Save As, enter a different Process Name, ID, and Description for the process copy, and then click Save.

Contact your CA Clarity PPM administrator for more information.

Follow these steps:

1. Open the Administration Tool.
The administration home page appears.
2. Open the Data Administration menu, and click Properties.
The available processes page appears.

3. Click the name for the Default Remedy Clarity Integration Process.
The properties page of process definition appears.
4. From the Properties menu, click Steps.
The process definition page of steps appears.
5. For each step, do the following:
 - a. Click the step name.
The step details page of process definition page appears.
 - b. In the Actions section, click Edit Custom Script.
 - c. Open the Properties menu, and click Custom Script Parameters.
The custom script parameters page appears.
 - d. Enter the appropriate values:

Step 1: Get Remedy Cases

RemedyMidTierURL

Defines the URL of the Remedy Mid-Tier application (including protocol, host address and port).

Example: http://remedyweb.bigcorp.com:8080

RemedyHost

Defines the Remedy Action Request System server host address. This is not necessarily the same host used in the Mid-Tier URL.

Example: remedy.bigcorp.com

RemedyUsername

Defines the username used to invoke the Remedy web service for reading Help Desk cases.

RemedyPassword

Defines the password for the Remedy user.

Step 2: Create Incidents

XOGURL

Defines the application URL (including protocol, host address and port).

Example: http://myApp.bigcorp.com

XOGUsername

Defines the user name for invoking the XOG web service for creating incidents.

XOGPassword

Defines the password for the XOG user.

RemedyAdmin

Defines the username of the user performing the Remedy Administrator role.

Example: remedyadmin

Step 3: Send Email

EmailFrom

Defines the email address from which notifications from in the process are sent.

EmailFromName

Defines the name associated with the email address above.

EmailTo

Defines the email address to which notifications from the process are sent.

e. Click Save and Exit.

6. Open the Default Remedy Clarity Integration Process.

The properties page of process definition appears.

7. From the Properties menu, click Validation.

The process validation page appears.

8. Click Validate All and Activate to check for errors and activate the process.

Note: There should be no validation errors in the default process. For any validation errors, address them prior to continuing.

Your changes are saved.

Chapter 3: Import Case Data into CA Clarity PPM

This section contains the following topics:

[Import Case Data](#) (see page 19)

Import Case Data

You can import case data into CA Clarity PPM by scheduling the Default Remedy Clarity Integration Process to run at regular intervals. You can do this manually or by running the *Execute a Process* job in CA Clarity PPM. This job is scheduled in CA Clarity PPM and runs at regular intervals. It downloads and transfers case data from Remedy that have a change in case status to "Closed" since the last transfer and inserts them as incidents into CA Clarity PPM.

Follow these steps:

1. Click the Home icon to return to CA Clarity PPM.
The general page appears.
2. Open the Personal menu, and click Organizer.
The action items page of organizer appears.
3. Click Processes, and then click Available.
The available processes page of organizer appears.
4. Select the check box next to Default Remedy Clarity Integration Process, and click Start.
The process starts.

Appendix A: Field Mappings

The following table show how the fields in Remedy map to CA Clarity PPM using CA Technologies Clarity Service Connect add-in:

Remedy Field	Type	CA Clarity PPM Field	Notes
"REMEDY"	string	sourceCode	The external source for the incident; "REMEDY" in this case.
Assignee_Login_Name	string	assignedTo effort/resourceCode	Mapped to user login name.
Case_ID	string	externalId incidentCode	Use the "RMD_" prefix.
Case_Type	string	typeCode	Mappings from Remedy to CA Clarity PPM are: <ul style="list-style-type: none">■ Incident == INCIDENT■ Question == SERVICE_REQUEST■ Request == SERVICE_REQUEST■ Problem == INCIDENT
Category	string	categoryCode	
Create_Time	dateTime	startDate	
Description	string	description	
Estimated_Total_Time	int	estimatedEffort	Expressed in minutes.
Request_Impact	string	impactCode	Mappings from Remedy to CA Clarity PPM are: <ul style="list-style-type: none">■ Low == 1■ Medium == 2■ High == 3
Modified_Time	dateTime	effort/transactionDate	This is also used by the integration script.

Remedy Field	Type	CA Clarity PPM Field	Notes
Priority	string	priorityCode	<p>Mappings from Remedy to CA Clarity PPM are:</p> <ul style="list-style-type: none"> ■ Low == 1 ■ Medium == 2 ■ High == 3 ■ Urgent == 3
Request_Impact	string	impactCode	<p>Mappings from Remedy to CA Clarity PPM are:</p> <ul style="list-style-type: none"> ■ Low == 1 ■ Medium == 2 ■ High == 3
Request_Urgency	string	urgencyCode	<p>Mappings from Remedy to CA Clarity PPM are:</p> <ul style="list-style-type: none"> ■ Low == 1 ■ Medium == 2 ■ High == 3 ■ Urgent == 3
Requester_Login_Name	string	reportedBy	Mapped to user login name.
Resolved_Time	dateTime	resolution_Date	
Status	string	statusCode	<p>Mappings from Remedy to CA Clarity PPM are:</p> <ul style="list-style-type: none"> ■ New == NEW ■ Assigned == ASSIGNED ■ Work In Progress == WORK_IN_PROGRESS ■ Pending == ON_HOLD ■ Resolved == RESOLVED ■ Closed == CLOSED
Summary	string	subject	

Remedy Field	Type	CA Clarity PPM Field	Notes
Total_Time_Spent	int	effort/quantity	Quantity is expressed in hours (Total_Time_Spent / 60 = quantity) The first time that Total Time Spent is passed to CA Clarity PPM, it is sent as a financial transaction effort. When values change for that field in Remedy, they are not imported into CA Clarity PPM when this process executes again.

The following table shows the mapping between Remedy and CA Clarity PPM to the source object:

Remedy Field	CA Clarity PPM Field	Source Object
Time	Effort	Financial Transactions
Category	Category Code	Incident (references Incident Category)
Type	Type	Incident
Item	External ID	Incident
Summary	Subject /Short Description	Incident
Status	Status	Incident
Priority	Priority	Incident
Resolution	Note	Notes
Contact	Name	Resource
Email	Email	Resource Contact
Assigned To	Assigned To	Incident (references Resource)
Elapsed Time	not applicable	not applicable
Request ID	Tracking ID	Incident
Date Opened	Start Date	Incident
Resolution Date	Resolution Date	Incident
not applicable	Expected Resolution Date	Incident