CA Clarity™ PPM

Service Connect Product Guide - On Premise

Release 02.0.00

CA Technologies Product References

This document references the following CA Technologies products:

- CA Technologies Clarity Service Connect

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Contents

Chapter 1: CA Clarity Service Connect Overview

This section contains the following topics:

About CA Clarity Service Connect

CA Technologies Clarity Service Connect is an add-in that connects CA Clarity PPM with BMC Remedy Service Desk (Remedy). This option transfers cases from a Remedy server to a CA Clarity PPM server as incidents where you can determine effort, costs, and customer charges. You can also achieve the following goals:

- Track internal service requests. CA Clarity PPM can help you understand how those requests impact IT resources and the investments that they support.
- Track and predict the incident-related costs of investments and projects that are 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 one or more incidents into planned work as CA Clarity PPM tasks or projects.
- Use one system for tracking the time and effort that is associated with IT resources for cases, incidents, and project work.

The CA Clarity Service Connect Incident Process

The following process describes the default incident lifecycle:

1. The requestor submits a request in Remedy.
2. The request becomes a Help Desk case and is routed to the appropriate assignee.
3. The assignee works on the case in Remedy and updates the record with information that is discovered during the troubleshooting process.
4. When complete, the assignee sets the case status to *Closed*.

   See the BMC Remedy Service Desk documentation for more information.

5. The Execute Process job is scheduled to run.
6. The incident manager reviews the incidents in CA Clarity PPM and determines their associated costs and any charges that apply to the customers.

CA Clarity Service Connect Remedy Administrator User and Privileges

The CA Clarity Service Connect add-in provides a new CA Clarity PPM user named Remedy Administrator. 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.

User attributes

The Remedy Admin User role includes the following attributes:

First Name

Default: Remedy

Last Name

Default: Administrator

Full Name

Default: Remedy Administrator

Login Name

Default: remedyadmin

Email Address

The email address of the Remedy Admin user that the process uses to send administrative messages.

User privileges

The CA Clarity PPM Remedy Administrator includes the following access privileges:

- 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: CA Clarity Service Connect Setup and Installation

This section contains the following topics:

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

These steps summarize the process of setting up the CA Technologies Clarity Service Connect add-in:

1. Set up Remedy (see page 9).
2. Install the add-in (see page 13).
3. Configure the process (see page 14).
4. Run the process or schedule the process to run on a schedule.

How to Set up Remedy for Connection to CA Clarity PPM

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 about the 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 Remedy Web Service query operation (see page 9).
2. Define the required query filter criteria (see page 10).
3. Select the data fields returned by Remedy Web Service (see page 11).

Create a Web Service for Query Operations

Remedy includes some default Web Services which you configure to include the filter criteria and data which your client application requires.

For example, CA Clarity PPM must filter using Remedy's Status field, which is not possible using stock Remedy Web Services. To be able to filter, you create a new Web Service query operation that uses a generic filter argument.

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: GetFilteredList
   - Type: 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.
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, select Cut to remove it, and click OK.
8. On the Operations List, define the following field:

   Qualification

   `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. In the right panel, under ROOT, create the following elements:

   Estimated_Total_Time

   Type: int

   Mapped to (left panel): Estimated Total Time

   Total_Time_Spent

   Type: int

   Mapped to (left panel): Total Time Spent

   Resolved_Time

   Type: dateTime

   Mapped to (left panel): Resolved Time

   Request_Impact

   Type: string

   Mapped to (left panel): Request Impact

   Modified_Time

   Type: dateTime

   Mapped to (left panel): Modified Time

3. Click Map.
4. Click OK, then save changes.

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

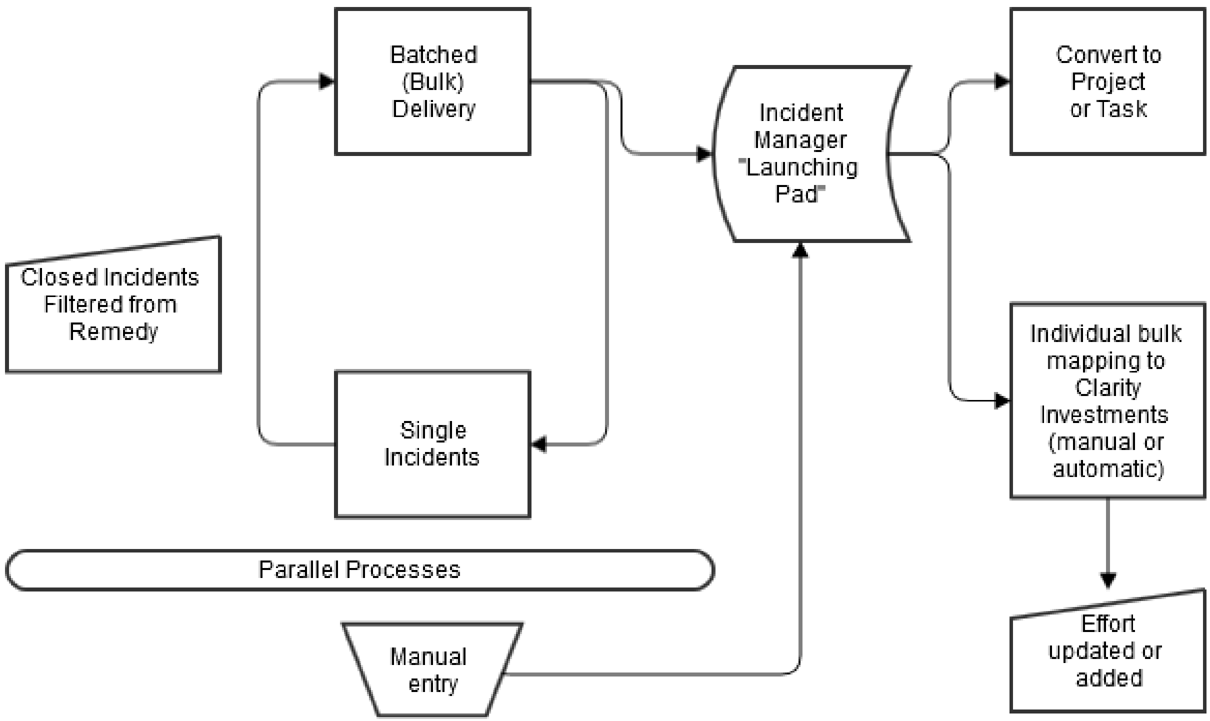
Example

```
<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 Clarity Service Connect Add-in

The Default Remedy Clarity Service Connect 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 cases is transfered to CA Clarity PPM, effort or changes you make to the case in Remedy are not tracked in CA Clarity PPM.

Fault Handling During Remedy Connection

You can incur errors during the connection and transfer of cases from Remedy to CA Clarity PPM incidents. The possible errors appear in the following list with explanations about their handling by the Default Remedy Clarity Integration Process:

- The Remedy resource that is 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 that is 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.

- The 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

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

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: Save a copy of the process before configuring it. The copy allows you to restore the process settings if necessary. Click Save As, enter a different Process Name, ID, and Description for the process copy, and then click Save.

Follow these steps:

1. Open the Administration Tool.
2. Open the Data Administration menu, and click Properties.
3. Click the name for the Default Remedy Clarity Integration Process.
4. From the Properties menu, click Steps.
5. For each step, perform the following substeps:
   a. Click the step name.
   b. In the Actions section, click Edit Custom Script.

c. Open the Properties menu, and click Custom Script Parameters.

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.
7. From the Properties menu, click Validation.
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.

Chapter 3: Import Case Data into CA Clarity PPM

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.
2. Open the Personal menu, and click Organizer.
3. Click Processes, and then click Available.
4. Select the check box next to Default Remedy Clarity Integration Process, and click Start.

Appendix A: CA Service Connect Field Mapping

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: ■ 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: ■ 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	Mappings from Remedy to CA Clarity PPM are: ■ Low == 1 ■ Medium == 2 ■ High == 3 ■ Urgent == 3
Request_Impact	string	impactCode	Mappings from Remedy to CA Clarity PPM are: ■ Low == 1 ■ Medium == 2 ■ High == 3
Request_Urgency	string	urgencyCode	Mappings from Remedy to CA Clarity PPM are: ■ 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	Mappings from Remedy to CA Clarity PPM are: ■ 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