Peregrine

Connect-It

3.0.0 - Remedy Service Management - AssetCenter

This edition applies to version 3.0.0 of the licensed program

Connect-It

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Business process integration

Document Introduction

This document focuses on specific points of integration between RSM Helpdesk and AssetCenter.

There are two primary aspects to this integration.

1 The data replication between the two systems, people, assets, cost centers, request templates, etc.

2 The ability to bring the processes of Problem/Helpdesk management together with the processes of Asset Management.

Assumptions

This proposal is designed with the understanding that the prospective clients of this product will have Remedy HD 4.x or 5.x and have not purchased Remedy Asset Management as an add-on products.

> **Note:** Field support will be using AssetCenter for work orders. Helpdesk support engineers will be using RSM Helpdesk.

Technical reference

- Remedy Service Management Help Desk recorda are referenced as "RSM HD Ticket"
- Remedy Service Management Change Management records are referenced as "RSM Change Request"
- AssetCenter Requests are referenced as "AC Request"
- AssetCenter Integrated Tickets are referenced as "AC Ticket"
- AssetCenter Expenses Lines are references as "AC Expenses"

About data integration

This integration assumes an existing Remedy Help Desk implementation to which Peregrine AssetCenter is being added. Some existing data in Remedy Help Desk must be replicated in the AssetCenter database to assure synchronization and interoperability. Connect-It scenarios have been created to perform the initial propagation of data. After they have been configured to suit your environment, scheduling should be enabled to maintain replication.

Requirements

Software	Version
Action Request System	4.x or 5
Remedy Helpdesk	4.x or 5
AssetCenter	4.1
Connect-It	2.7.x or 3

Supported Development Server Operating Systems

The following is a list of all server operating systems supported by the implementation process:

- Windows NT 4
- Windows 2000 Server Addition

Supported Client Operating Systems

The following is a list of all client operating systems supported by the implementation process

- Windows 95/98
- Windows NT
- Windows 2000

Supported DBMS

The following is a list of all operating DBMS supported by the implementation process:

- Oracle 7.3 and 8
- MS SQL Server 6.5 (SP4 & SP5) and 7.0
- Sybase 11.0

Preintegration Set Up - AssetCenter

To enable the integration of AssetCenter with the RSM products, a few steps must be taken in AssetCenter prior to running the Connect-It scenarios. It is important to the success of the integration that you follow these steps precisely.

1   To aid reconciliation, a Feature must be added to amPortfolio, amAsset and amComputer. - Import the feature fv_RemedyAssetID from the file **features.zip**.

Preintegration Set Up - Remedy Service Management

A few steps must be taken in on the Action Request Server prior to running the Connect-It scenarios. It is important to the success of the integration that you follow these steps precisely.

1   Run the Remedy install program, **NAME GOES HERE**, if you would like changes to your existing Remedy server to occur automatically. We have outlined the steps here, if you would like to do them manually or are tracking changes made to your server.

2   The data for hard disk size and memory size are stored in character fields in the form **AST:Workstation**. The data needs to be stored as an integer with units associated. To correct existing data, Peregrine has provided an escalation and filters to attempt to copy over to new fields, your existing data in the proper format. This is only entended as an aid. It will not change existing data, only attempt to populate new fields.

The following fields are imported to **AST:Workstation**.

Field Type	Data or Display-Only	Database Name	Field Number	Enumerated Value	Default Value
Integer	Data	IntHardDiskSize	200000052	n/a	n/a
Integer	Data	IntMemorySize	200000053	n/a	n/a
Selection	Data	Hard Disk Size Units	200000054	(0)MB,(1)GB	MB

Selection	Data	Memory Size Units	200000055	(0)MB,(1)K	MB
Integer	hidden/ Display-Only	zTmpUnit	230000014	n/a	n/a
Character -length 30	hidden/Display-Only	zTmpUnitPos	230000015	n/a	n/a

3   To facilitate the linking of AssetCenter records with Remedy records, we've implemented the scenarios to pass ID numbers and state values. To use these scenarios these fields need to add to **CHG:Change**, **CHG:Task** and **HPD:Helpdesk**.

Field Type	Data or Display-Only	Database Name	Field Number	Enumerated Value	Default Value
Selection	Data - Read-only	AC Status	260800900	(0)Ready to Send, (1)In preparation, (2) Standard request, (3) Quoted, (4)Awaiting approval, (5) Validated, (6)Refused, (7)Reserverd, (8) Satisfied, (9)Closed, (10) Error	none
Character -length 15	Data - Read-only	AC Request ID	260100900	n/a	n/a

4   To facilitate the linking of related tickets, the scenarios use a field that must be added to **SHR:DefineAssociation**. The following field will be added to **SHR:DefineAssociation**

Field Type	Data or Display-Only	Database Name	Field Number	Enumerated Value	Default Value
Character -length 15	Data - Read-only	zTmpACRequestID	250000900	n/a	n/a

5   The following filters are including in the installation.

Filter Name	Related Form	Purpose

???	HPD:HelpDesk	Creates TCO:LineItem entry
???	TCO:LineItem	Gets rate from SHR:Person for TCO:LineItem, then calculates cost.
???	TCO:LineItem	Gets related asset information for TCO:LineItem
???	HPD:HelpDesk, CHG:Change, CHG:Task	If the AC Status is set to 'Error', sends a notification to the Remedy Administrator.

6 The following active links are including in the installation. The notation of (UPDATE) means a previous version existed and has been replaced.

Active Link Name	Related Forms	Purpose
SHRDA:INTG-PushACReqID_Adv	SHR:DefineAssociation	???
SHRDA:INTG-PushACReqID_Pre	SHR:DefineAssociation	???
SHRH:HPD-CreateRelatedHPD (UPDATE)	HPD:HelpDesk	Tied to the Create->Case menu. If the user has selected to create a related case, it runs a macro that opens the HPD:HelpDesk form in Submit mode with information from the current case passed to the submit window.
SHRH:HPD-CreateRelatedHPD_new	HPD:HelpDesk	???
SHRH:SHR-SearchViaCP1 (UPDATE)	HPD:HelpDesk	???
SHRH:SHR-SearchViaCP2 (UPDATE)	HPD:HelpDesk	???

7 The following escalations are including in the installation.

Escalation Name	Related Forms	Purpose
AST:Workstation RUN ONCE TO CLEAN UP DISK AND MEM SIZE	AST:Workstation	See step below.

8 Set the escalation **AST:Workstation RUN ONCE TO CLEAN UP DISK AND MEM SIZE** to run at a time when the production data can be updated in bulk. This escalation should be run once, then disabled. After the escalation has run, check the data to see that data

from the old Hard Disk and Memory fields has successful updated to the new fields. Once this has been done, we recommend you hide the old fields and utilize the 4 new fields. The filters that are included in this definition file will continue to set the new data fields if you have any pushfield or import operations that might be referencing the old fields.

9 Verify that data stored in the 'Phone' field on the form **SHR:People** does not exceed 20 characters. Using the Remedy Administrator tool, shorten the database length of the field to 20 characters. This is necessary because the 'Phone' field in AssetCenter is 20 characters long and phone numbers will be truncated on import if they exceed this length.

10 On the form **AST:Workstation**, the information about CPU Type needs to be standardized. In Remedy Service Management, this field is a free-format field, whereas in AssetCenter the CPU Type and CPU Speed information are stored in two different fields. If you only store the CPU Type in the corresponding Remedy Service Management field, there is no further operation that needs to be performed. If, on the contrary, you store both the CPU Type and the CPU Speed in this field, you will have to create an additional field, following the example developed in item 2 above.

11 Errors occuring during the execution of scenarios are stored in XML files located in the **scenario\error** folder of the Connect-It installation folder (typically **C:\Program Files\Peregrine\ConnectIt**).

You may, for example, encouter problems while propagating the department names from Remedy Service Management to AssetCenter. This particular field is limited to 50 characters in AssetCenter and names cannot be truncated to this limit to avoid reconciliation problems. Such records will not be processed and an error will be logged in the aforementioned XML file. Please, check this file after any propagation attempt to make sure that all your data has safely been transfered.

12 Errors occuring during the execution of the Helpdesk and Change scenarios additionaly send a notification of the error occurance. By default this notification will go to the user "Demo", using the default

notification method set in the AR System form, User. To modify the notification, use the AR Administrator tool and change the escalation **NAME GOES HERE.**

1 Initial Propagation of data to AssetCenter

CHAPTER

1 Launch Connect-it.

  • Open each of the following scenarios and configure it to run with your installation.
  • Right click the Action Request System connector and configure it to your server.
  • Right click the Asset Management connector and configure it to your server.

2 Run the scenarios in the following order

Classification Information

amNature

Nature data must be entered first. The Nature of an Asset is the generic classification of an item, such as Monitor, Server, Laptop, Printer, etc. Assuming the Remedy installation followed the sample data provided

in SHR:Categorization the information would be found as follows. If this mapping is incorrect, the implementor will need to adjust it.

Table 1.1. Asset Natures

Scenario Name	SHRCategorization
Mapping Name	SHR:CategorizationSrc-amNatureDst
Source Document Type	SHR:CategorizationSrc
Destination Document Type	amNatureDst
Mapping constraint	if [Type] = "---" then pifIgnoreDocumentMapping end if

Rec. Key	**Element**	**Mapping**
	Code	[Category]
	Name	[Category]
	seBasis	if [ApplicationSchemaKeyword] = "ALL" then RetVal = 99 else RetVal = 1 end if
	seMgtConstraint	if [ApplicationSchemaKeyword] = "ASSETINSTOCK" then RetVal = 0 else RetVal = 2 end if

Table 1.2. Contract Natures

Scenario Name	SHRCategorization
Mapping Name	SHR:CategorizationSrc-amNatureDst (Contracts)
Source Document Type	SHR:CategorizationSrc
Destination Document Type	amNatureDstContracts
Mapping constraint	if [Type] <> "---" then pifIgnoreDocumentMapping end if

Rec. Key	**Element**	**Mapping**
	Code	RetVal= "Contract"
	Name	RetVal= "Contract"
	seBasis	4

Note: After the scenario has been run to propagate Nature information, you must open the Natures table and set the information on the general tab. This step must be done to assure assets are created properly. Additionally, you may choose to update the Code field to a prefix type code, an example would be Standard Asset has a code of STD_ASSET.

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amModel

Model data must be entered after Nature because a model is a specific type of a nature. An example of model data would be "Satellite Pro 490CDT" for a Brand of "Toshiba" under the Nature of "Laptop". Assuming the Remedy installation followed the sample data provided in SHR:Categorization the information would be found as follows. If this is incorrect, the mapping will need to be adjusted.

Table 1.3. Models

Scenario Name	SHRCategorization
Mapping Name	SHR:CategorizationSrc-amModelDst
Source Document Type	SHR:CategorizationSrc
Destination Document Type	amModelDst
Mapping constraint	if [Type] = "---" then pifIgnoreDocumentMapping end if

Rec. Key	Element	Mapping
🔑	Name	[Item]
🔑	Nature.Name	[Category]
🔑	Parent.Name	[Type]
🔑	Parent.Nature.Name	[Category]

Table 1.4. Contract Models

Scenario Name	SHRCategorization
Mapping Name	SHR:CategorizationSrc-amModelDst (Contracts)
Source Document Type	SHR:CategorizationSrc
Destination Document Type	amModelDstContracts
Mapping constraint	if [Type] <> "---" then pifIgnoreDocumentMapping end if

Rec. Key	Element	Mapping
🔑	Name	[Category]
🔑	Nature.Name	RetVal = "Contract"
🔑	Parent.Name	f [ApplicationSchemaKeyword] = "ASSETSOFTWARE" then RetVal = "Software License" elseif [ApplicationSchemaKeyword] = "ASSETLEASE" then RetVal = "Lease" elseif [ApplicationSchemaKeyword] = "ASSETSUPPORT" then RetVal = "Support" elseif [ApplicationSchemaKeyword] = "ASSETWARRANTY" then RetVal = "Warranty" elseif

		[ApplicationSchemaKeyword] = "ASSETMAINTENANCE" then RetVal = "Maintenance" end if
Rec. Key	**Element**	**Mapping**
🔑	Parent.Nature.Name	RetVal = "Contract"

Location Information

Location information for AssetCenter is stored in amLocation. Location information in Remedy Service Management is stored in multiple locations. To reconcile this difference in the two products, three scenarios must be run.

Table 1.5. Location - Region and Site

Scenario Name	SHRLocation
Mapping Name	SHR:LocationSrc-amLocationDst (Region, Site)
Source Document Type	SHR:LocationSrc
Destination Document Type	amLocationDst
Mapping constraint	if [Region] = "" Or [Site] = "" then pifIgnoreDocumentMapping end if

Rec. Key	**Element**	**Mapping**
🔑	Name	[Site]
🔑	Parent.Name	[Region]

Table 1.6. Location -Address

Scenario Name	SHRPeople_Location
Mapping Name	SHR:PeopleSrc-amLocationDst (Address)
Source Document Type	SHR:PeopleSrc
Destination Document Type	amLocationDst
Mapping constraint	if [Region] = "" Or [Site] = "" Or [AddrLine] = "" then pifIgnoreDocumentMapping end if

Rec. Key	**Element**	**Mapping**
	Address1	[AddrLine]
🔑	BarCode	[Site]+[AddrLine]
	City	[City Name+]
	Name	[AddrLine]
	State	[State/Prov+]
	ZIP	[Postal Code+]

Rec. Key	Element	Mapping
	Parent.Name	[Site]
	Parent.Parent.Name	[Region]

Table 1.7. Location -Office

Scenario Name	SHRPeople_Location
Mapping Name	SHR:PeopleSrc-amLocationDst (Office)
Source Document Type	SHR:PeopleSrc
Destination Document Type	amLocationDst1
Mapping constraint	if [Office] = "" Or [Site] = "" Or [AddrLine] = "" Or [Region] = "" then pifIgnoreDocumentMapping end if

Rec. Key	Element	Mapping
🔑	BarCode	[AddrLine]+ [Office]
	Name	[Office]
🔑	Parent.Name	[AddrLine]
🔑	Parent.Parent.Name	[Site]
🔑	Parent.Parent.Parent.Name	[Region]

Department Information

Department information for AssetCenter is stored in amEmplDept. The source of the information in Remedy Helpdesk and Asset Mangement is SHR:Location.

Table 1.8. Departments

Scenario Name	SHRLocation
Mapping Name	SHR:LocationSrc-amEmplDeptDst (Dept)
Source Document Type	SHR:LocationSrc
Destination Document Type	amEmplDeptDst
Mapping constraint	if [Region] = "" Or [Site] = "" Or [Department] = "" then pifIgnoreDocumentMapping end if

Rec. Key	Element	Mapping
	bDepartment	1
🔑	Name	[Site] + "(" + [Department] + ")"

Rec. Key	Element	Mapping
🔑	Location.Name	[Site]
🔑	Location.Parent.Name	[Region]
	Parent.bDepartment	1
🔑	Parent.Name	[Department]

People Information

The source of information is SHR:People. The target is amEmpDept and associated links.

✎ Note: The difference in field length of Phone in amEmplDept and SHR:People must be reconciled before running this scenario. See the preintegration setps for details.

Table 1.9. People

Scenario Name	SHRPeople
Mapping Name	SHR:PeopleSrc-amEmplDeptDst
Source Document Type	SHR:PeopleSrc
Destination Document Type	amEmplDeptDst
Mapping constraint	if ((([Region] = "")) OR ((([Site]) = "") OR ((([Department]) = "") then pifIgnoreDocumentMapping end if

Rec. Key	Element	Mapping
🔑	BarCode	[Login Name]
	bDepartment	0
	Email	[Email]
	FirstName	[First Name]
	Name	[Last Name]
	Phone	[Phone]
🔑	Location.FullName	if [Region] <> "" And [Site] <> "" And [AddrLine] <> "" And [Office] <> "" then RetVal = "/" + [Region] + "/" + [Site] + "/" + [AddrLine] +

Rec. Key	Element	Mapping
		"/" + [Office] + "/" elseif [Region] <> "" And [Site] <> "" And [AddrLine] <> "" then RetVal = "/" + [Region] + "/" + [Site] + "/" + [AddrLine] + "/" elseif [Region] <> "" And [Site] <> "" then RetVal = "/" + [Region] + "/" + [Site] + "/" elseif [Region] <> "" then RetVal = "/" + [Region] + "/" else RetVal = "" end if
	Parent.bDepartment	1
🔑	Parent.Name	[Site] + "(" + [Department] + ")"
	Parent.Parent.bDepartment	1
🔑	Parent.Parent.Name	[Department]
	Title	[Training Received]

Asset Information

The final area of the initial replication of data is to populate the asset tables in AssetCenter with known asset information from asset forms in RSM. This will include data from AST:Asset, AST:Component, and AST:Workstation. These scenarios must be run in the order listed.

The first scenario imports the data from AST:Asset.

Table 1.10. Main Asset Information

Scenario Name	ASTAsset2Portfolio
Mapping Name	AST:AssetSrc1-amPortfolioDst
Source Document Type	AST:AssetSrc1
Destination Document Type	amPortfolioDst
Mapping constraint	

Rec. Key	Element	Mapping
🔑	Asset Tag	[Asset ID+]
🔑	Code	[Asset ID+]
	fv_RemedyAssetID	[Entry-Id]
	seAssignment	if [Status] = 0 then RetVal = 3 elseif [Status] = 1 then RetVal = 1 elseif [Status] = 2 then RetVal = 1 elseif [Status] = 3 then RetVal = 0 elseif [Status] = 4 then RetVal = 4 elseif [Status] = 5 then RetVal = 4 elseif [Status] =

Rec. Key	Element	Mapping
		6 then RetVal = 2 elseif [Status] = 7 then RetVal = 1 elseif [Status] = 8 then RetVal = 2 end if
🔑	Asset.AssetTag	[Asset ID+]
🔑	Asset.BarCode	[Asset ID+]
	Asset.dAcquistion	[Installation Date]
	Asset.SerialNo	[Serial Number]
	Asset.SharingName	[Name]
🔑	Asset.Model.Name	[Item]
🔑	Asset.Model.Nature.Name	[Category]
🔑	Asset.Model.Parent.Name	[Type]
🔑	Asset.Model.Parent.Nature.Name	[Category]
🔑	Location.Name	[Site]
🔑	Location.Parent.Name	[Region]
🔑	Model.Name	[Item]
🔑	Model.Nature.Name	[Category]
🔑	Model.Parent.Name	[Type]
🔑	Model.Parent.Nature.Name	[Category]

The second scenario imports the data from AST:Component. Components in a Remedy implementation are assumed to be children of a specific asset. The parent would have been imported by running the previous scenario. This scenario will find that parent asset and link the components.

Table 1.11. Component Asset Information

Scenario Name	ASTComponent2Portfolio
Mapping Name	AST:ComponentSrc-amPortfolioDst
Source Document Type	AST:ComponentSrc
Destination Document Type	amPortfolioDst
Mapping constraint	

Rec. Key	Element	Mapping
🔑	Asset Tag	[Component ID+]+[Main Asset ID]
	fv_RemedyAssetID	[Entry-Id]
	seAssignment	if [Status] = 0 then RetVal = 0 elseif [Status] = 1 then RetVal = 4 elseif [Status] = 2 then RetVal = 1 elseif [Status] = 3 then RetVal = 3 elseif [Status] = 4 then RetVal = 1 end if
🔑	Asset.AssetTag	[Component ID+]+[Main Asset ID]
🔑	Asset.BarCode	[Serial Number]
	Asset.dAcquistion	[Installation Date]

Rec. Key	Element	Mapping
🔑	Asset.Model.Name	[Item]
🔑	Asset.Model.Nature.Name	[Category]
🔑	Asset.Model.Parent.Name	[Type]
🔑	Location.Name	[Site]
🔑	Location.Parent.Name	[Region]
🔑	Model.Name	[Item]
🔑	Model.Nature.Name	[Category]
🔑	Model.Parent.Name	[Type]
🔑	Model.Parent.Nature.Name	[Category]
🔑	Parent.fv_RemedyAssetID	[Main Asset Eid]

The third scenario imports the data from AST:Workstation. In a Remedy implementation the additional information about workstation assets is stored in a separate table, AST:Workstation. This is similar to the date structure and relationship between amAsset and amComputer. This scenario will find the computer asset and link this additional information which will be stored in the amComputer table.

Note: The preintegration work to correct the storage of Hard Disk and RAM data must be done before running this scenario. See the preintegration setps for details.

Table 1.12. Workstation/Computer Asset Information

Scenario Name	ASTWorkstation
Mapping Name	AST:WorkstationSrc-amPortfolioDst
Source Document Type	AST:WorkstationSrc2
Destination Document Type	amPortfolioDst
Mapping constraint	

Rec. Key	Element	Mapping
🔑	Asset Tag	[Asset ID+]
🔑	Code	[Asset ID+]
🔑	Asset.AssetTag	[Asset ID+]
	Asset.Computer.CPUType	[Processor]
	Asset.Computer.IMemTotalMb	[Total RAM]
	Asset.Computer.IpxSpxAddress	[IPX Address]
	Asset.Computer.TCPIP	[IP Address]

Asset.Computer.IDiskSizeMb	[Total Hard Disk]
Asset.Computer.IMemorySizeMb	[Total RAM]
Asset.Computer.Name	[Node Name]
Asset.Computer.OperatingSystem	[Operating System]
Asset.Computer.OSBuildNumber	[Operating System Version]
Asset.Computer.PhysicalAdress	[MacAddress]
Asset.Computer.Workgroup	[Work Group]

This completes the initial phase of the data propagation between Remedy Service Management and AssetCenter. In the next phase of the project, we will be providing scenarios to integrate business processes between Helpdesk and AssetCenter workorders, and Change Request and Workorders.