



# NetIQ® Aegis Adapter for BMC Remedy Installation Guide

September 2011

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This document describes how to install and configure the NetIQ Aegis Adapter for BMC Remedy.

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## Overview

The NetIQ Aegis Adapter for BMC Remedy (Remedy adapter) allows the automation of run books and broader processes in BMC Remedy from your NetIQ Aegis Console.

The Remedy adapter includes a library of workflow activities specific to BMC Remedy that Process Authors can use in the Workflow Designer.

For more information about activities or activities libraries, see the *Process Authoring Guide for Aegis*.

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## Product Requirements

The Remedy adapter requires the following software versions:

- Aegis 2.2
- BMC Remedy 7.6.04
- Microsoft .NET Framework 2.0

One of the following operating systems:

- Windows Server 2003 Service Pack 2 or later (32-bit)
- Windows Server 2008 Service Pack 2 or later (32- and 64-bit)
- Windows Server 2008 R2

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## Implementation Overview

The following table provides an overview of tasks to configure the Remedy adapter.

	Steps	For more information, see...
<input type="checkbox"/>	1. Configure the minimum rights and privileges for installing the Remedy adapter.	<a href="#">"Ensuring Minimum Rights and Privileges"</a> on page 2
<input type="checkbox"/>	2. Install the Remedy adapter.	<a href="#">"Installing the Remedy adapter"</a> on page 2
<input type="checkbox"/>	3. Install the event renderer on the Web Server computer.	<a href="#">"Installing the Event Renderer"</a> on page 3
<input type="checkbox"/>	4. Run the Form and Fields Mapping Tool for the Remedy adapter.	<a href="#">"Using the Form and Fields Mapping Tool"</a> on page 3
<input type="checkbox"/>	5. Verify the installation was successful.	<a href="#">"Verifying a Successful Installation"</a> on page 4

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## Ensuring Minimum Rights and Privileges

Before installing the Remedy adapter, ensure the user who installs the adapter has the following minimum rights and privileges:

- Privileges to view all the forms they would like to run activities.
- Privileges to change/create the values of the files they want to update or create.

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## Installing the Remedy adapter

The Remedy adapter allows Aegis to communicate with BMC Remedy, and allows Process Authors to add Remedy activities to an Aegis workflow. You must install the Remedy adapter on the Aegis Server computer. For more information about installing Aegis, see the *Administrator Guide for Aegis*.

If your Aegis server computer is part of a cluster, you must install the Remedy adapter on each node in the cluster. The installation program automatically detects whether the node is active or passive. The Remedy adapter needs to be installed with the same feature set selected, on both the Aegis active node and all the Aegis passive nodes.

### To install the Remedy adapter on the Aegis Server computer:

1. Log on to the Aegis Server computer with a local administrator account.
2. Run the setup program from the folder where you downloaded the Remedy adapter.
3. Click **Next**.
4. Accept the license agreement, and then click **Next**.
5. *If the Aegis Server and Web Server are on the same computer in your Aegis environment*, on the Select Components window, select the following options:
  - Remedy Adapter
  - Event Renderer and Parsers
6. *If the Aegis Server and Web Server are on separate computers in your Aegis environment*, on the Select Components window, select **Remedy Adapter**.

For more information about installing the event renderer on a separate Web Server computer, see [“Installing the Event Renderer”](#) on page 3.

7. On the Logon Information page of the installation wizard, complete the following steps:
  - a. *If the Aegis Server computer is not part of a cluster environment*, verify the Aegis Server computer name or IP address and the server port.
  - b. *If the Aegis Server computer is part of a cluster environment in the active node*, verify the cluster name or IP address and the server port.
  - c. Specify the logon credentials for the Aegis service account. If you do not know the logon credentials for the Aegis service account, contact your Aegis administrator.
  - d. *If the Aegis Server computer belongs to a domain*, ensure you specify the correct domain.
  - e. Click **Next**.

8. Click **Next**.
9. Follow the remaining instructions in the NetIQ Aegis Adapter for BMC Remedy Setup wizard, and then click **Finish**.

#### **To upgrade the Remedy adapter from version 1.0 to version 1.1:**

In order for the installer to upgrade from version 1.0 to version 1.1 the setup program retrieves the adapter configuration and fills the forms in the installer UI. Information on the Remedy Server host name, port, RPC, user and password are displayed and all the files generated by the Mapping Tool are preserved.

The user must provide the user password that authorizes the connection with the Mapping Tool since this is not retrieved by the installer.

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## Installing the Event Renderer

The event renderer for the Remedy adapter provides rendering functionality for the layout of Remedy event details in the Operations Console.

If your Web Server computer is part of a cluster, you must install the event renderer on the active node first, and then on each passive node.

#### **To install the event renderer on the Web Server computer:**

1. Log on to the Web Server computer with a local administrator account.
2. Run the setup program from the folder where you downloaded the Remedy adapter.
3. Click **Next**
4. Accept the license agreement, and then click **Next**.
5. On the select components window, select **Event Renderer**, and then click **Next**.
6. Follow the remaining instructions in the NetIQ Aegis Adapter for BMC Remedy Setup wizard, and then click **Finish**.

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## Using the Form and Fields Mapping Tool

Once your installation is complete, the Form and Fields Mapping Tool for the Remedy adapter allows you to create a configuration file with the required fields to:

- Create, update and find Remedy form entries
- Subscribe to Remedy update/create entry events

The server browser displays a hierarchical structure of the form and field component definition in the Remedy server. This view shows only the information to which you have access at the form and field level.

The field colors in this view provide the following information:

- Red: required
- Violet: system

- Yellow: display only
- Green: optional

You must select the forms to use them when configuring activities. You can add or remove forms or fields in the following ways:

- Use the context menu of the form or field in the server browser.
- Use the buttons to the right of the server browser to select the forms and fields you want to subscribe to in order for detecting changes.

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## Verifying a Successful Installation

After completing the installation process of the Remedy Adapter successfully, please launch the Form and Fields Mapping Tool for the Remedy Adapter from the application menu under the adapter folder.

Verify that the Form and Fields Mapping Tool for the Remedy Adapter connects to the Remedy server and that the tool recovers and displays the forms and fields for the Remedy database.

After verifying a successful installation, NetIQ recommends you build a simple workflow with one of the activities in the BMC Remedy Adapter Library. For more information about building workflows, see the *Process Authoring Guide for Aegis*.

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## Workflow Activities Overview

The activities in the Remedy Adapter library allow NetIQ Aegis to perform the following types of tasks:

- **Create Form Entry:** this activity allows you to configure the form and assign the values in the input fields. The values you assign determine the input of the form entry created by the activity.
- **Find Form Entry:** this activity allows you to configure the form and assign the values in the input fields. The files you choose and the values you assign determine the criteria that will be used to search for a specific form entry.
- **Get Field Value:** this activity allow you to configure the form entry id locator and the file id. The activity obtains the value from the selected field.
- **Update Entry:** this activity allow you to configure the form, form entry id locator, and assign the values in the input fields. The fields you choose and the values you assign determine which fields of the form entry should be updated by the activity.

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## Uninstalling the Remedy Adapter

You can uninstall the Remedy adapter using Add/Remove Programs in Windows Control Panel.

If you are uninstalling from a cluster environment, ensure the following:

- Uninstall the adapter from all passive nodes first.
- Remove the node from the cluster before you uninstall the adapter.