Connect with Remedy – Smart IT 2.0: Configurability and Customization Webinar

Q&A

Presentation References

BMC Remedy with Smart IT 2.0 User Documentation: Administering
https://docs.bmc.com/docs/smartit20/administering-749669934.html

Configuring Actions in Smart IT
https://docs.bmc.com/docs/smartit20/configuring-actions-in-smart-it-749669954.html

Adding custom fields to your views using Smart IT
https://docs.bmc.com/docs/smartit20/adding-custom-fields-to-your-views-using-smart-it-749669935.html

Expressions
https://docs.bmc.com/docs/smartit20/configuration-details-of-expression-775458945.html

Q&A

Q: Will these same updates be applied to the knowledge console as well?
A: In 2.0 we addressed primarily ticket console. Knowledge and Asset console very much on the radar.

Q: Is the custom fields within filters also available within Knowledge and Asset consoles?
A: In 2.0 we addressed primarily ticket console. Knowledge and Asset console very much on the radar. Not in 2.0. That capability is focused on ticket console. But we consider adding this to other consoles later on.

Q: Filter on "Custom Text", what fields are searched in?
A: "Custom Text" is a name of one custom field which Jon has already added. So, the filter will search on that field only.

Q: is the custom field configured by end user or by admin.
A: Custom field is configured by the Admin
Q: Can we add custom fields with search menus?
A: Are you asking if you can add custom menu fields, which have a search capability in the mid-tier UI? You can add menus, but the menu behavior may be different.

Q: I would like to add missing fields but, I can't see it, because it isn't a custom field. It's a standard field like Product Categories.
A: Product Category is what we now call a Widget. If via configuration, if you remove that widget then you would see underlying fields like Cat1, Cat2 etc. available for customization.

Q: Can "incident Last modified by" be added into ticket console filter or layout?
A: it can, but this currently needs a bit of a workaround. You need to create a custom field which mirrors the data, and then add that. We are planning to extend the configurability of the console in a future release.

Q: What is plan for contract management to Smart IT?
A: It is under consideration for a future release. We are keen to talk with customers about their requirements in this area, as it is something that is evolving considerably in the multi-cloud era. Please feel free to email jon_hall@bmc.com if you'd be interested in talking about this subject.

Q: Will such separated views like Create Incident View and Incident View be introduced for other modules as well? like problem, known error, etc.
A: This is under consideration for future releases. We can go into more detail in a more formal roadmap presentation. Please contact your account team to arrange.

Q: Can we configure custom forms?
A: Currently custom forms are not supported by the Smart IT user interface.

Q: Ticket Console: Logical Operator like AND, OR possible with Brackets?
A: A verbose/typed query for consoles is under consideration for future releases. To a good extent, the current structure does support a degree of combined "AND" and "OR" logic in that you can select multiple attributes (AND) and multiple possible values for each attribute (OR).
Q: Are there any plans to integrate Virtual Chat so Incidents will open in Smart IT vs midtier?

A: Custom fields need to be enabled first, that is an admin activity. End users then can use them to add to their ticket console view or to filter. The incidents created by Virtual Chat already are visible in Smart IT. I assume you are asking about the live chat function for SD agent? We do plan to make further improvements in this area, but 2.0 does not introducing anything new here.

Q: it this custom text field a trim field?

A: No its a character field in Remedy ITSM

Q: So, even if the field has no data, it will now show up on the screen?

A: The header field for custom fields shows.

Q: Can you bring custom forms into SMART IT?

A: That’s not possible in 2.0.

Q: Adding Custom fields including tables? would the AL that refresh the table works?

A: No. Table fields are not yet available in Smart IT. ITSM based Active Links won’t work but we have a good mechanism available now in Smart IT 2.0 called Expressions.

Q: Does the configuration of the out of box fields also apply to the asset views?

A: Smart IT 2.0 address primarily deep customizability for Incident and Change request.

Q: Can you add custom fields to table in the asset console or just the ticket console?

A: Right now for 2.0, it’s for Ticket console only.

Q: Do you can create groups, widgets, sections, etc. that are hidden/visible based on certain criteria being met like through workflow?

A: We have ability to show/hide fields based on criteria using what we now call as Expressions.

Q: Can widgets be customized? Can custom widgets be created?

A: Widgets themselves can't be customized. Also, right now one can't build a Widget.
Q: We have a customization in the legacy blue incident form that allows us to change a template after incident creation. We could not do this in prior versions of Smart IT so we cannot use this product at our Help Desk. Has this been addressed in 2.0?

A: It's not an ootb function in 2.0 (for the same reasons why do don't support it in the mid-tier ITSM UI ootb), but you may be able to leverage provider actions to implement this as customization. The UX may be different to the mid-tier UI.

Q: Can you create custom widgets?

A: Smart IT 2.0 doesn’t allow creation of custom widgets.

Q: Are widget creations possible for admins?

A: If you meant registering your own widgets, then that’s not yet possible with Smart IT 2.0.

Q: Can I restore the View layout back to original OOTB after experimenting?

A: Yes you would be able to do that using step by step approach. But if you are looking for a single click restore then we don't have that yet.

Q: How do you handle custom fields on a per-company basis when you have a multi-tenancy configuration?

A: Expressions should allow you to show/hide fields based on Company criteria.

Q: Will there be an option to add custom fields to the smart recorder customer info?

A: It is possible. You have to add the custom field to the person profile view, and then it will also show in customer info of Smart Recorder.

Q: I'm asking if we can add a custom field to Smart IT that uses a dynamic search menu. Sort of like how the Product Name field works.

A: If the field has Menu associated with it then it should show you a type-ahead type driven menu for that field.

Q: We have custom tabs on CRQ and INC requests, can custom sections be added to Smart IT 2.0?

A: Though we have underlying design in place, the configuration UI in 2.0 won’t allow you to add new sections. But you can rearrange the fields from OOTB sections and possibly free up a section to position your custom fields.
Q: Any idea when custom forms would be possible?

A: We are considering different options for extending customizability to custom objects. Smart IT's interface is not rendered on the basis of data definition in the same way that Mid-Tier is. This gives it usability advantages which are aimed to improve both user satisfaction and productivity.

Q: I would love to see the ability to add a custom field to the widget. i.e. a similar to VIP, a flag field for a person

A: Thanks for the suggestion. We plan to further enhance the UI configurability.

Q: Will the APIs be updated automatically when new custom fields are added?

A: The APIs are themselves not publicly documented but just for your information that they have a generic section to handle custom fields.

Q: Is it possible to filter tickets by categories in 2.0?

A: Not in 2.0.

Q: He briefly showed the mobile application which included a resources tab. Will this tab utilize knowledge?

A: It already does in previous versions of Smart IT and continues to do so.

Q: Can you update the dashboards on the homepage within 2.0 with custom criteria?

A: No, this hasn't changed in 2.0

Q: in regards to your answer regarding templates "for the same reasons " as not in mid tier... can you point me to what those reasons are, we are looking to customize mid tier to allow this, but would like to avoid any potential pit falls

A: To make a complex topic short: when a user selects a template, you can (potentially) run all kinds of workflow that makes various changes to the ticket. It's very, very hard to "undo" workflow like this. -

A: Alternatively, you have to think about creating a new incident (to start clean) with the different template and close out the old one. You then can still copy fields over, but from a workflow perspective, it's cleaner.

Q: Can you set value from a back-end form?

A: Any filter workflow will continue to run on server. In addition, the provider action concept has been enhanced to triggers server workflow. The latter can bring back info to the UI.
Q: Does Set Value works only with static strings or the values of other fields could be used as well?

A: The value of other field values can be used, including in the if/then/else construct which was demonstrated.

Q: For clarity on response to adding custom fields on Smart Recorder. Adding the field to the person profile view. Is that starting with 2.0, or is that for earlier versions?

A: This worked even in earlier Smart IT versions, prior to 2.0.

Q: How these UI's get integrated with automations, BAO let's say?

A: Depends on your use case. You can have UI integration (launch). You can trigger AO processes based on certain ticket properties (this would be triggered on the server). Note that we also have an ootb integration ("Change Automation").

Q: Is it possible to group other fields to widgets, to e.g. populate mobile phone number for the selected customer?

A: The Provider Action can be built to update any fields, not just the one it is triggered from.

Q: Is smart it2.0 available in EPD for download?

A: At the moment, the bits are in controlled availability, i.e. you need a password. But we plan to make this GA very soon, and there's also a plan to deliver a patch on top of 2.0 very soon.

Q: I saw in the field editing section there was a create group button, does that allow you to create custom groupings of fields, similar to a widget?

A: The Create Group option is used when implementing menu fields which depend on other menu fields. See https://docs.bmc.com/docs/smartit20/adding-dynamic-menu-fields-to-smart-it-views-749669943.html for more information.

Q: Can we set a value from a different form?

A: You can do with with Provider Actions.

Q: These expressions are in line to which scripting or language?

A: In line with Innovation Suite, it uses the JSEP parser (JavaScript Expression Parser)
Q: Is there a way to change the behavior of any non-custom field? For example, the Product Catalog, instead of showing all of them, filter by prefix or other field?

A: Those fields can be removed and replaced as desired. It may be possible to achieve what you are looking for using dynamic menus and/or custom fields though we’d need a little more detail.

Q: With next upgrade will it overwrite what you have customized?

A: No, we will have to ensure that your customizations are preserved. We are working on how to inform you if any reconciliation is needed.

Q: Can you pull in a value from another field if a condition is met?

A: Provider Actions allow you to pull values from any form to a field. Expression would allow you to set value of a screen field based on another screen field.

Q: Could the provider actions be used to replicate the ITSM Copy Change functionality?

A: We have starting to explore that. Should be possible. See e.g. https://communities.bmc.com/thread/175867-

Q: If a provider action modifies the values of one or more fields in the incident, will the new values be shown right away after the provider action is completed, or, as it is in older versions, the user will have to manually refresh the incident in order to

A: If the action is defined as Synchronous, the behavior is as before (in the background, requiring a refresh). If run as an asynchronous action, it updates as soon as the action is processed, with no refresh needed.

Q: Is Active link supported with Smart IT 2.0 version?

A: No, as Jon mentioned earlier, we don’t support it in 2.0, and we have no plans at this time to support ActiveLinks for Smart IT. We are looking for easy-to-maintain ways to implement UI logic w/o coding. That’s why we are using expression concept

Q: Is there any option in Smart IT to convert current Active Link to Smart IT UI Configuration-Provider action?

A: Not everything would translate to Provider Actions. Many ActiveLink use cases should be covered by expressions.

Q: In regards to field customization, can you apply multiple conditions such as visible and required, each with their own qualifications?

A: Yes.
Q: With next upgrade will it overwrite what you have customized or will it use overlay type capability?

A: We have built an overlay like capability in Smart IT. So, we will ensure that your customizations are not overwritten.

Q: In provider actions can we add more fields in input and output mapping

A: Provider actions are based on Remedy Service Filter. The developer is supposed to provide a "specification" of the Service Filter he/she implemented and that drives the list of inputs and output fields.

Q: Is the Customer field also available in Asset form? Will the Custom field be created in AR system, too? We are using API to insert the data to Asset records in AR and we would like the data be able to be displayed in Smart IT UI.

A: Yes, you have an option to add custom fields to Asset View, but that capability does not yet support the new concepts we support for 2.0 (expressions, enhanced provider actions).

Q: Can Provider Action be triggered to update Menu type fields, or only free text?

A: Yes, they can be.

Q: Can the custom fields in Smart IT be view in standard console?

A: By standard console do you mean Smart IT ticket console or ITS M console? Custom Fields can be added to the ticket console in Smart IT.

Q: Clarifying my question...If a value is entered in a field will it dynamically set other fields based on that entry on the form once entered? Perform a lookup of data.

A: It will update dynamically, yes, though there is no lookup of data from the database in client-side expressions (this requires a provider action instead).

Q: Is there an easy way to migrate provider actions between environments, i.e. from DEV to QA, QA to PROD, etc.?

A: We are supporting now the transfer of Smart IT configuration from Dev to Prod environments via Deployment Application in Remedy. You must be on 9.1.04 for the AR System platform to use this.

Q: Unlike set field which can trigger on menu choice or on focus now with providers actions we are expecting our customers to click on a More -> Action or an icon to run the actions?

A: For now, yes. Extending this is under consideration for a subsequent release.
Q: Have not seen an answer on my question yet, with next upgrade say to 2.1 will it overwrite what you have customized or will we have to reapply?

A: Sameer answered above, but there is an "overlay" capability in Smart IT.

Q: What about MyIT - will it be possible to customize it in similar way?

A: The capabilities we show here apply to Smart IT UI only. In my experience, much of what users see in BMC Digital Workplace (formerly MyIT) is configuration/content driven anyway. There are ways to tweak Digital Workplace, but not all you see here.

Q: ITSM Console

A: Every field that you see in Smart IT is coming from ITSM itself. So that means its added to ITSM first then becomes available in Smart IT. So, it should be possible to get that field in ITSM console as well.

Q: Have you removed the "Assign to me" button?

A: "Assign to me" option is still there, but we may not show this anymore, if ticket is already assigned to the login user. In the past, we always showed it.

Q: Can we add custom fields in the Smart IT ticket console filter options?

A: Yes

Q: What's new in Smart Recorder?

A: There is no additional functionality in this release for Smart Recorder. It'd be interesting to understand if you are looking for something specific.

Q: Can Smart IT show pop-ups when a ticket is unassigned or send a sound alert? Each 15 min for example

A: If you wish to build custom pop-up dialogs then in 2.0 Smart IT has not provided that ability.

Q: Ticket Console: Logical Operator like AND, OR possible with Brackets?

A: Not part of the 2.0 functionality. There is an idea for this in the BMC Community.

Q: Can the custom fields in Smart IT be view in the ITSM console?

A: The custom field in Smart IT is a custom field in ITSM. You have to add it first to ITSM to appear in Smart IT. So that’s why you can add to ITSM console as well
Q: Should D2P be used for the interface forms?

A: Interface forms don’t store any permanent data. So, would not be needed for D2P,

Q: When is this coming for RoD/RaaS customers?

A: You can request an upgrade to latest Remedy and Smart IT version via i.onbmc.com. BMC will then work with you on a schedule for you.

Q: What is your advice to customer (with customizations) having a mix of users on both Mid-tier and Smart IT regarding provider actions?

A: Provider actions are intended to make use of most of the business logic already built in ITSM, because Service Filters are perhaps the best way to package your logic even from Midtier perspective.

Q: Would you be able to configure what change type is selectable? for example, hiding (Standard Change) if it is not used in our environment?

A: In Change the main Change screen is configurable but the startup screen where you choose the change type is not yet configurable

Q: Any changes to the Asset Persona?

A: No, not in this release.

Q: We just downloaded Digital Workplace Basic 3.5. Is this Smart IT 2.0?

A: I believe the package for DWP 3.5 includes Smart IT 1.6 (latest patch)

Q: So, fields can be conditionally required such as submitter ="mark"

A: Yes

Q: Is smart reporting available on smart it 2.0?

A: Yes, it was available in earlier versions of Smart IT as well.

Q: Is Smart IT installer available now to implement in lower environment?

A: This question needs clarification.
Q: Are there going to be any patch releases soon
A: There is a Smart IT 2.0 patch planned to be released very soon.

Q: If a customer had only SRM+Work Order, but not ITSM, can Smart IT be used to access work order tickets and tasks?
A: Check the Smart IT documentation for details - https://docs.bmc.com/docs/smartit20/smart-it-permissions-749669463.html

Q: can I do a change menu? Such as assignee field
A: You could hide the out-of-box field and replace it with a custom field, with whatever menu you want to configure.

Q: Are there any changes made between SmartIT2.0 (Controlled Avail.) and GA?
A: No.

Q: Does expressions support the ability to show/hide custom fields for a multi-tenancy environment?
A: Company is one of the fields that can be used in expressions.

Q: Still waiting for an answer regarding change types. Can we decide what change types appear on the screen?
A: It's not a configuration option, as of 2.0. We've had customers who have fiddled with JavaScript to make UI tweaks, but I don't know if that would apply here and it's not a recommended approach.

Q: Are there any plans to build Smart IT and Digital Workspace / MyIT on top of Innovation Studio (analogically to Remedy ITSM applications which runs on ARS platform)?
A: There are no plans to do this. BMC Remedy is our core offering for enterprise IT Service Management.

Q: Do we have to press "edit" to change the status from assigned to In Progress?
A: You can also click directly on Status field arrow, like in earlier versions.

Q: Just to confirm, we can launch Mid-tier (custom dialog form) from a provider action in Smart IT, isn't it? This is to cover custom forms that cannot otherwise be opened directly from Smart IT.
A: You would typically use a URL action.
Q: Is the "Reports" Link in Smart IT now there by default? Does it point to Smart Reporting?

A: The link was there before 2.0 by default. Yes, it points to Smart Reporting

Q: Where can I find clear documentation on "Smart Recorder" to get customers to use this feature?

A: This should help - https://docs.bmc.com/docs/display/public/smartIT14/Smart+Recorder+-+Handling+tickets+dynamically+in+Smart+IT

Q: Is there any way to use JavaScript (or other web tech) with Smart IT, expressions, etc. For example, in one of the previous questions about an alert, can we invoke JavaScript to pop up an alert?

A: Right now we have not exposed a way to embed custom JavaScript.

Q: Currently we have 9.1.03 and smart it 1.5. is it possible to just upgrade only smart it to 2.0?

A: It is. We support all 9.1 versions with Smart IT 2.0. But you'd miss out on some capabilities (e.g. Dev-to-Prod, cognitive). So, we generally support to upgrade to 9.1.04, at least for the Remedy platform -

Q: Can you confirm this - "I believe the package for DWP 3.5 includes Smart IT 1.6 (latest patch)"

A: Smart IT 2.0 is available on a Controlled Availability basis in a package with DWP 3.5. General availability is planned shortly.

Q: Is there a way to make module not available? for example if we did not want users to be able to open an adhoc WO, can we remove the 'create' option in Smart IT?

A: There are some options to deactivate modules in Smart IT UI. see https://docs.bmc.com/docs/smartit20/disabling-application-modules-in-smart-it-749669556.html

Q: When building the Provider Actions, can we validate customer input? Generate Messages to end users

A: Yes, you can do this with filter logic.

Q: Would innovation studio work with on prem Smart IT installs? Or do we build it in the innovation studio cloud and package and deploy it on prem smart it install?

A: You can integrate an Innovation Suite developed solution with Smart IT UI on premise - e.g. via cross-launch.
Q: We would like to use Innovation studio to build application, but since it is not provided as OnPremise. Do to customer security restriction we are not able to have anything deployed in public cloud. Any plans to have innovation studio provided as OnPremise?

A: This would be best discussed in more detail in a roadmap presentation. Please contact your account team if this is required.

Q: What is the pre-requisite for Smart IT 2.0 from AR Platform perspective?

A: As documented in Smart IT compatibility doc, we support all Remedy ITSM 9.1 versions, but recommend to use 9.1.04 at least for the Remedy platform, so that you have full capabilities (e.g. Dev-to-prod).

Q: Right now in Smart IT (1.5), you can't see what template was used to create a CRQ, is that avail in 2.0?

A: It is possible to set up the Template field to be added to the views using the Screen Configuration interface.

Q: Are there any changes to the information we see on related items or tasks from the Incident or from the Change? (ex on a change in 1.6 I see on the list of related task the status, assignee, phase, ) (I miss the status reason : )

A: Not in this version. This is under consideration.