Data Management Administration Guide

Supporting

Version 7.6.04 of BMC Remedy Asset Management
Version 7.6.04 of BMC Remedy Change Management
Version 7.6.04 of BMC Remedy Service Desk

January 2011

Contacting BMC Software

You can access the BMC Software website at http://www.bmc.com. From this website, you can obtain information about the company, its products, corporate offices, special events, and career opportunities.

United States and Canada

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Support website

You can obtain technical support from BMC 24 hours a day, 7 days a week at http://www.bmc.com/support. From this website, you can

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- find the most current information about BMC products
- search a database for problems similar to yours and possible solutions
- order or download product documentation
- download products and maintenance
- report a problem or ask a question
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- find worldwide BMC support center locations and contact information, including e-mail addresses, fax numbers, and telephone numbers

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In the United States and Canada, if you need technical support and do not have access to the web, call 800 537 1813 or send an e-mail message to customer_support@bmc.com. (In the subject line, enter **SupID:*yourSupportContractID***, such as SupID:12345). Outside the United States and Canada, contact your local support center for assistance.

Before contacting BMC

Have the following information available so that Customer Support can begin working on your issue immediately:

- product information
  - product name
  - product version (release number)
  - license number and password (trial or permanent)
- operating system and environment information
  - machine type
  - operating system type, version, and service pack or other maintenance level such as PUT or PTF
  - system hardware configuration
  - serial numbers
  - related software (database, application, and communication) including type, version, and service pack or maintenance level
- sequence of events leading to the problem
- commands and options that you used
- messages received (and the time and date that you received them)
  - product error messages
  - messages from the operating system, such as file system full
  - messages from related software

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- In the United States and Canada, call 1 800 537 1813. Outside the United States and Canada, contact your local support center for assistance.
- Submit a new issue at http://www.bmc.com/support_home.

Contents

About this book

The *Data Management Administration Guide* describes how to install and use the Data Management tool that is part of BMC Remedy IT Service Management (BMC Remedy ITSM).

This document is intended for application administrators and BMC Remedy Action Request System administrators.

BMC Remedy ITSM includes the following applications and solutions:

- BMC Remedy Asset Management application
- BMC Remedy Change Management application
- BMC Remedy Service Desk solution (which includes the BMC Remedy Incident Management application and the BMC Remedy Problem Management application)

BMC Remedy ITSM can be integrated with the following applications:

- BMC Service Request Management application
- BMC Service Level Management application

The applications run in conjunction with the BMC Remedy Action Request System platform (AR System) and share a common database. All five of the applications consume data from the BMC Atrium Configuration Management Database (BMC Atrium CMDB) application.

Like most BMC documentation, this book is available in printed and online formats. To request printed books or to view online books and notices (such as release notes and technical bulletins), see the Customer Support website at http://www.bmc.com/support. Most product shipments also include the books on a documentation CD.

Note

Online books are formatted as PDF or HTML files. To view, print, or copy PDF books, use the free Adobe Reader from Adobe Systems. If your product installation does not install the reader, you can obtain the reader at http://www.adobe.com.

The software also offers online Help. To access Help, press **F1** within any product or click the **Help** button in graphical user interfaces (GUIs).

About the BMC Remedy ITSM Suite

The following sections provide an overview of the following BMC Remedy ITSM products:

- BMC Atrium CMDB on page 10
- BMC Remedy Asset Management on page 10
- BMC Remedy Change Management on page 11
- BMC Remedy Incident Management on page 11
- BMC Remedy Problem Management on page 11
- BMC Service Request Management on page 12
- BMC Service Level Management on page 12

BMC Atrium CMDB

BMC Atrium CMDB is installed prior to any of the BMC Remedy ITSM applications. It stores information about configuration items (CIs) and their relationships in an inheritance-based data model, and has the ability to reconcile data from different sources. BMC Atrium CMDB provides a "single source of truth" about your IT environment, enabling other BMC applications to manage CIs, predict the impact of configuration changes, and perform other Business Service Management (BSM) functions.

For more information, see the *BMC Atrium CMDB User's Guide*.

BMC Remedy Asset Management

The BMC Remedy Asset Management application lets IT professionals track and manage enterprise configuration items (CIs)—and their changing relationships—throughout the entire asset life cycle. As part of the BMC Remedy ITSM Suite, Asset Management is integrated with BMC Remedy Service Desk (which contains the BMC Remedy Incident Management and BMC Remedy Problem Management applications), BMC Remedy Change Management, and BMC Service Level Management, and offers flexibility to support customized business processes.

For more information, see the *BMC Remedy Asset Management User Guide*.

BMC Remedy Change Management

Using best practices that are compatible with the IT Infrastructure Library (ITIL), BMC Remedy Change Management provides IT organizations with the ability to manage changes by enabling them to assess impact, risk, and resource requirements, and then create plans and automate approval functions for implementing changes. It provides scheduling and task assignment functionality, and reporting capabilities for reviewing performance and improving processes. Because BMC Remedy Change Management is integrated with the BMC Atrium CMDB, BMC Remedy Change Management lets you relate changes to other records, such as CIs (including services) and incidents.

For more information, see the *BMC Remedy Change Management User Guide.*

BMC Remedy Incident Management

BMC Remedy Incident Management is used to manage incidents. Incident management is reactive, and is typically initiated in response to a customer call or automated event. An example of an automated event might be an alert from a monitoring system, such as BMC Service Impact Management (BMC SIM). The primary goal of the incident management process, according to ITIL standards, is "to restore normal service operation as quickly as possible with minimum disruption to the business, thus ensuring that the best achievable levels of availability and service are maintained."

An incident is any event that is not part of the standard operation of a service and that causes an interruption to or a reduction in the quality of that service. Normal service operation is the operation of services within the limits specified by BMC Service Level Management (SLM).

For more information, see the *BMC Service Desk: Incident Management User Guide*.

BMC Remedy Problem Management

BMC Remedy Problem Management is used to manage problem investigations, known errors, and solution database entries. Problem management can proactively prevent the occurrence of incidents, errors, and additional problems. A problem investigation helps an IT organization get to the root cause of incidents. It initiates actions that help to improve or correct the situation, preventing the incident from recurring.

After a problem investigation identifies the cause, this information can result in either a known error or a solution database entry. A known error is a problem that has been successfully diagnosed and for which a temporary workaround or permanent solution has been identified. A solution database entry contains information that might be required to provide or restore a service.

For more information, see the *BMC Service Desk: Problem Management User Guide*.

BMC Service Request Management

BMC Service Request Management (BMC SRM) allows IT to define offered services, publish those services in a service catalog, and automate the fulfillment of those services for their users. With SRM, users have the ability to help themselves, which reduces the requests coming into the service desk. This enables IT to focus on more mission-critical activities, such as resolving incidents related to service failures and restoring critical services. BMC SRM also provides the ability to automate workflow for each service, enforcing consistency of process and faster fulfillment of the request.

For more information, see the *BMC Service Request Management Administrator's and User's Guide.*

BMC Service Level Management

BMC Service Level Management enables a service provider, such as an IT organization, a customer support group, or an external service provider, to formally document the needs of its customers or lines of business using service level agreements, and provide the correct level of service to meet those needs.

BMC Service Level Management also provides a means to review, enforce, and report on the level of service provided. It streamlines the most important task of all, which is the communication between a service provider and its customers. Multiple service targets can be defined and monitored, acting as a bridge between IT service support and IT operations. This enables costs to be controlled and helps to provide a consistent level of service in support of key business services.

For more information, see the *BMC Service Level Management User's Guide*.

Related documentation

The table that follows lists the available documentation for BMC Remedy ITSM. It also lists other documents referenced within the *Data Management Administration Guide* and within the instructions in the spreadsheets.

Unless otherwise noted, online documentation in Adobe Acrobat (PDF) format is available on the product installation distribution media, on the Customer Support website (http://www.bmc.com/support), or both. You can order printed documentation from the Customer Support website. A complete list of documents that support the BMC Remedy ITSM applications is available from the Customer Support website.

Note

To access the support website, you must have a support contract.

Table 1: Related documentation

Title	Description
BMC Remedy ITSM	
BMC Remedy IT Service Management Installation Guide	Procedures for installing the BMC Remedy IT Service Management applications and solutions (including the BMC Remedy ITSM Data Management tool, the BMC Remedy Service Desk solution, BMC Remedy Change Management, and BMC Remedy Asset Management).
BMC Remedy Asset Management User Guide	Procedures for using the BMC Remedy Asset Management application; includes new features and an overview.
BMC Remedy Change Management User Guide	Procedures for using the BMC Remedy Change Management application; includes new features and an overview.
BMC Remedy Data Import Help	Procedures for using the BMC Remedy Data Import utility.
BMC Remedy IT Service Management Administration Guide	Procedures for configuring the BMC Remedy ITSM applications.
BMC Remedy Service Desk: Incident Management User Guide	Procedures for using the BMC Remedy Service Desk: Incident Management application; includes new features and an overview.
BMC Remedy Service Desk: Problem Management User Guide	Procedures for using the BMC Remedy Service Desk: Problem Management application; includes new features and an overview.
BMC Remedy IT Service Management Concepts Guide	Provides a conceptual overview of the applications that make up the BMC Remedy IT Service Management Suite.
BMC Atrium CMDB	
BMC Atrium CMDB User's Guide	Information about using the BMC Atrium CMDB, including searching for CIs and relationships, launching federated data, reporting, and running reconciliation jobs.

Title	Description
BMC Service Level Management	
BMC Service Level Management User's Guide	Procedures for using the BMC Service Level Management application; includes new features and an overview.
BMC Service Request Management	
BMC Service Request Management Guide for Administrators and Users	Procedures for administrating and using the BMC Service Request Management application.

Conventions

This document uses the following special conventions:

- `All syntax, operating system terms, and literal examples are presented in this typeface.`
- Variable text in path names, system messages, or syntax is displayed in italic text:

  testsys/instance/*fileName*
- This document uses a symbol to show menu sequences. For example, **Actions => Create Test** instructs you to choose the **Create Test** command from the **Actions** menu.

What's new in Data Management Administration

This topic summarizes product changes and enhancements.

Prior to BMC Remedy ITSM 7.6.04, you could not promote data if errors were found during validation and all records had to be validated without errors. As of BMC Remedy ITSM 7.6.04, the processes are streamlined so you can successfully promote data that has validated without error even when there are staging forms with records that have errors. For more information, see Fixing errors on staging forms on page 84.

The `dataimport.bat` file is no longer available from BMC Remedy Developer Studio. Instead the Data Load utility now uses `dataimport.bat` from the BMC Remedy Data Import utility to import data to a staging form.

Chapter 1

Introduction

You can use the BMC Remedy IT Service Management (BMC Remedy ITSM) Data Management tool to import data into BMC Remedy ITSM and to modify existing data.

Overview of the Data Management tool

This section provides an overview of the steps that you follow to use the Data Management tool to load data into and modify existing data in your BMC Remedy ITSM system. It also provides some high-level scenarios that describe when you might want to use the Data Management tool and some examples of typical ways to use the tool.

For examples of typical ways to use the Data Management tool, see Examples showing typical uses of the tool on page 23.

For more information about loading data into your BMC Remedy ITSM system, see Importing data on page 77. For more information about changing data already loaded into the system, see Using the data wizard to modify data on page 91.

You must have AR System Administrator permissions to see the Data Management tool options in the Custom Configuration tab of the Application Administration Console.

For instructions on installing the Data Management tool, see the *BMC Remedy IT Service Management Installation Guide*.

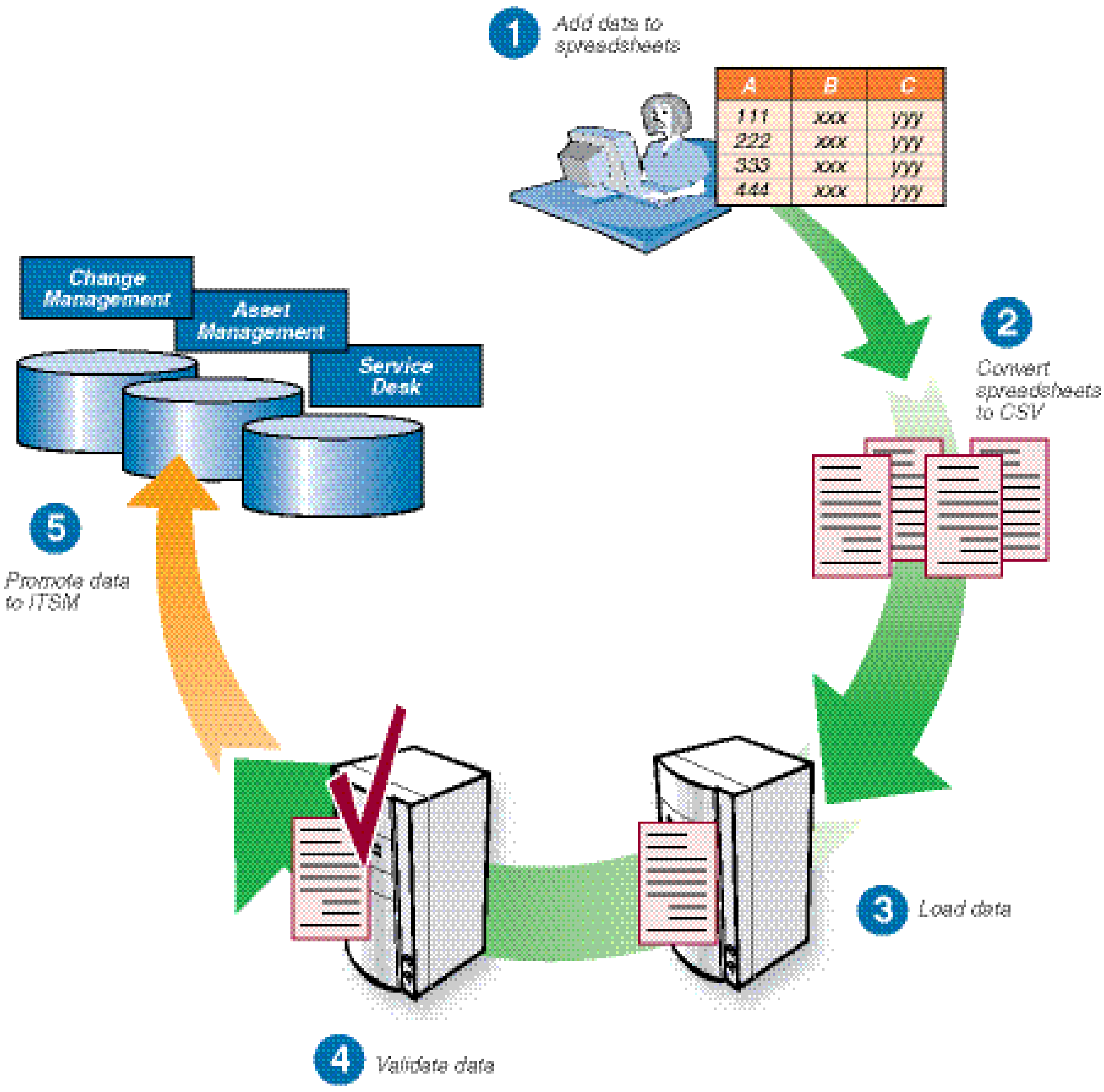
Dataload process

You can use the Data Management tool to load data from spreadsheets into your BMC Remedy ITSM system.

Figure 1 on page 16 shows the steps in the dataload process. Each step is further described in Dataload steps in more detail on page 16.

For more detailed information about the Data Load Console, see “Overview of the Data Load Console” on page 77.

Figure 1: Overview of the dataload process



Dataload steps in more detail

This section describes the dataload steps illustrated in the overview of the dataload process in more detail, providing references to chapters and sections later in the guide.

1 Add data to spreadsheets, and modify any existing data as necessary.

Note

You can manually type information into the spreadsheets or you can export it from BMC Remedy ITSM or another application and then import it into the spreadsheets.

The Data Management tool includes Microsoft Excel workbook files. Each tab in a workbook file corresponds to a form in BMC Remedy ITSM, as described in "How tabs map from spreadsheet to target form " on page 221.

For instructions on working with the spreadsheets, see Completing the spreadsheets on page 55.

2 Use the Data Load Console to convert the spreadsheet data to CSV files.

 The tool converts the spreadsheet data to the appropriate CSV files, as described in Loading data from spreadsheets on page 78.

3 Use the Data Load Console to import the data.

 You must perform specific steps to load the data. For instructions, see Loading data from spreadsheets on page 78.

4 Validate the data.

 For instructions, see Validating and promoting the data on page 81.

5 Promote the data into BMC Remedy ITSM.

 For instructions, see Validating and promoting the data on page 81.

 Note

 If you have customized BMC Remedy ITSM, see Managing customizations on page 109.

Changing data already loaded

If you have loaded data into your BMC Remedy ITSM system or you already have data in your system, you can use the data wizard to modify that data.

For more information about the data wizard, see Using the data wizard to modify data on page 91.

Performance benchmarks

BMC measured performance benchmarks for the following uses of the Data Management tool:

- Loading foundation data in bulk
- Loading transactional data in bulk
- Modifying records with the data wizard

Performance benchmarks for loading foundation data

This section shows how many records per hour were processed by the Data Management tool in the BMC Software performance lab.

Table 2: Performance benchmarks for foundation data

Task	Throughput (records per hour)
Load people data from the CSV file to staging forms	225,000
Validate people data in staging forms	1,000,000
Promote people data into BMC Remedy ITSM forms	220,000

The test data for these performance benchmarks consisted of 238,000 People records, which included 1,200 support staff.

Hardware environment

The performance benchmarks were performed on two Dell PowerEdge 1850 servers connected to a LAN with 100 MBps network interface card. Each server has two 3.8 Ghz Intel Xenon processors, 4 GB RAM and two local hard drives (10 KB rpm).

Software environment

Table 3 on page 18 indicates the software environment for the two servers.

Table 3: Software environment for performance benchmark lab during foundation data load testing

Server	Component	Version	Running on
A	Windows 2003 server	Enterprise Edition SP1	Dell PowerEdge 1850
A	BMC Remedy AR System server	7.0.1 patch 004	Windows 2003 Server
A	BMC Remedy ITSM applications	7.0.2 patch 005	Not applicable
B	Red Hat Enterprise Linux	2.6.9-55.ELsmp	Dell PowerEdge 1850
B	Oracle 10*g* R2	10.2.0.3	Red Hat Enterprise Linux

The BMC Remedy AR System server was configured for multi-threading, as described in the *BMC Remedy IT Service Management Installation Guide*.

For Oracle configuration, the initialization parameters were set as follows:

- `cursor_share=force`
- `optimizer_index_cost_adj=25`
- `optimizer_index_caching=90`
- `sga_target=800M`
- `pga_aggregate_target=200M`
- `open_cursors=300`

Data files were on one hard drive, while all the online redo log files were on another dedicated hard drive.

Performance benchmarks for loading incident records

This section shows how many records per hour were processed by the Data Management tool in the BMC Software performance lab.

Table 4: Performance benchmarks for transactional data

Task	Throughput (records per hour)	Tips to enhance throughput
Load incident records from the CSV file to staging forms	181,000	None
Validate incident data in staging forms	186,000	Use a BMC Remedy AR System server with a more powerful CPU. Throughput is limited by the CPU capacity of the BMC Remedy AR System server.
Promote incident data into BMC Remedy ITSM forms	92,000	Improve the I/O subsystem on the database server. Throughput is limited by the disk I/O capacity on the database server.

The test data for these performance benchmarks consisted of the following records:

- 320,000 incident tickets
- 140,000 people records
- 10,000 service catalog entries

- 3,000 sites
- 462 companies

Hardware environment

The performance benchmarks were performed on two Dell PowerEdge 1850 servers connected to a LAN with 10 MBps network interface card. Each server has two 3.8 Ghz Intel Xenon processors, 4 GB RAM and two local hard drives

(10 KB rpm).

Software environment

Table 5 on page 20 indicates the software environment for the two servers.

Table 5: Software environment for performance benchmark lab during transactional data load testing

Server	Component	Version	Running on
A	Windows 2003 server	Enterprise Edition SP1	Dell PowerEdge 1850
A	BMC Remedy AR System server	7.0.1 patch 004	Windows 2003 Server
A	BMC Remedy ITSM applications	7.0.3 patch 006	Not applicable
B	Red Hat Enterprise Linux	2.6.9-55.ELsmp	Dell PowerEdge 1850
B	Oracle 10*g* R2	10.2.0.3	Red Hat Enterprise Linux

The BMC Remedy AR System server was configured for multi-threading, as described in the *BMC Remedy IT Service Management Installation Guide*.

For Oracle configuration, the initialization parameters were set as follows:

- `cursor_share=force`
- `optimizer_index_cost_adj=25`
- `optimizer_index_caching=90`
- `sga_target=800M`
- `pga_aggregate_target=200M`
- `open_cursors=300`

Data files were on one hard drive, while all the online redo log files were on another dedicated hard drive.

Performance benchmarks for modifying records with the data wizard

This section shows the length of time to process specified data by the Data Management tool in the BMC Software performance lab.

Table 6: Performance benchmarks for updating company fields on the Incident form (HPD:Help Desk form)

Total number of records	Number of affected records	Time to complete updates
500,000	250,000	41 seconds
500,000	0	17.6 seconds
1,000,000	500,000	2 minutes, 27 seconds
1,000,000	250,000	1 minute, 31 seconds
1,000,000	0	1 minute, 10 seconds

Hardware environment

The performance benchmarks were performed on one Dell PowerEdge 2950 server connected to a LAN. The server has one 1.86 Ghz Intel E5320 processor (4 cores), 8 GB RAM, and two local hard drives.

Software environment

Table 7 on page 21 indicates the software environment for the two servers.

Table 7: Software environment for performance benchmark lab during data wizard testing

Component	Version	Running on
Windows 2003 server	Enterprise Edition SP2	Dell PowerEdge 2950
BMC Remedy AR System server	7.0.1 patch 006	Windows 2003 Server
BMC Remedy ITSM applications	7.0.3 patch 006	Windows 2003 Server
Oracle 10*g* R2	10.2.0.1	Windows 2003 Server

For Oracle configuration, the initialization parameters were set as follows:

- `sga_target=1224M`
- `pga_aggregate_target=800M`

Data files were on one hard drive, while all the online redo log files were on another dedicated hard drive.

When to use the Data Management tool

You can use the Data Management tool whenever you want to import data or modify data. This section lists typical scenarios and the high-level procedures.

Note

You cannot run the Dataload tool and the data wizard at the same time.

Table 8: Scenarios for using the Data Management tool

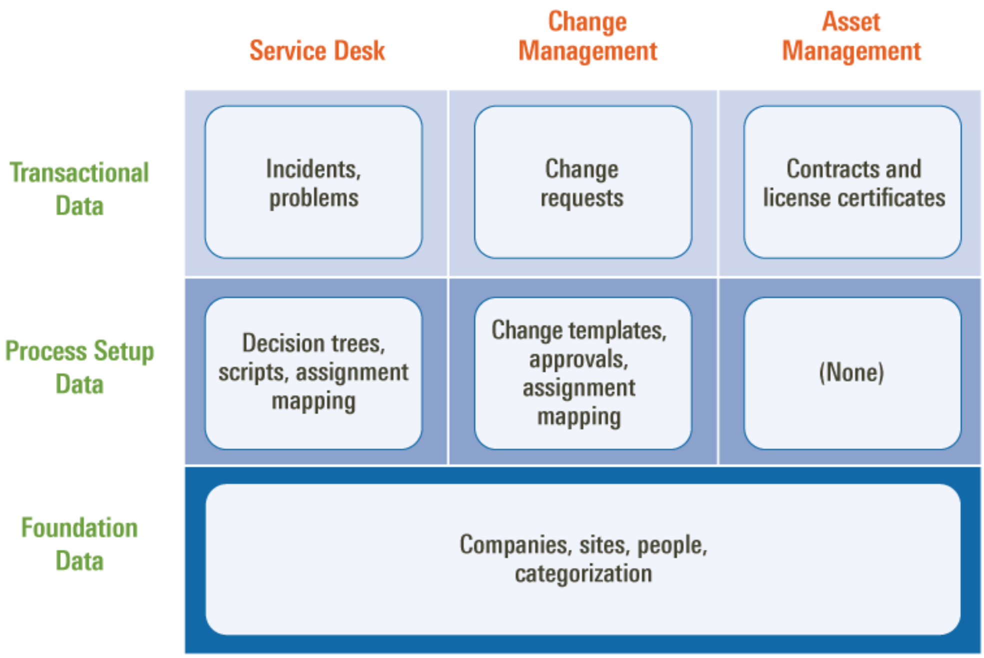
Scenario	Procedures
BMC Remedy ITSM is being installed for the first time	■ Load foundation data and process-setup data. ■ Optionally, use the data wizard to modify sample data for your environment.
A company, business unit, department, or other group is being added to an existing installation of BMC Remedy ITSM	Load foundation data and, optionally, process-setup data.
BMC Remedy ITSM is being migrated from an earlier version	■ Load foundation data, process-setup data, and transactional data. ■ Use the data wizard to modify data to be appropriate to your implementation of the current version of BMC Remedy ITSM. For information about migration tasks, see Migrating data - Data Load Console on page 24.
An acquisition, reorganization, or rebranding has occurred, resulting in changes to the names of companies, support groups, or other areas	Use the data wizard to rename data to the new values.

The three levels of data in BMC Remedy ITSM, illustrated in Figure 2 on page 23, are:

- **Foundation data** — Configuration data that applies to all of the BMC Remedy ITSM applications, such as companies, sites, people, and categorization.
- **Process setup data** — Configuration data that affects processes for a specific application. For example, decision trees can be used by BMC Remedy Service Desk.

- **Transactional data** — Records created during day-to-day use of the product, such as incidents and change requests.

Figure 2: Levels of data in BMC Remedy ITSM



Examples showing typical uses of the tool

This section provides the following examples that illustrate some typical uses of the Data Management tool.

- Migrating data from an earlier version of BMC Remedy ITSM or from a third-party tool. See Migrating data - Data Load Console on page 24.
- Adding new tasks and task group templates to a system. See Adding task groups and task group templates — Data Load Console on page 25.
- Adding another company to an existing BMC Remedy ITSM installation. See Adding another company to an existing installation of BMC Remedy ITSM — Data Load Console on page 31.
- Changing a user's login ID. See Changing a user's login ID — Data Wizard Console on page 48.
- Reorganizing a department, which requires support group names to be changed to reflect the new organization. See Reorganizing a department and changing support group names — Data Wizard Console on page 52.

Migrating data - Data Load Console

Migration scenarios for using the Data Management tool include:

- **Migrating from a version earlier than 6.0** — If you use automated migrations, you would have to run more than one migration, to first migrate to 6.0, and then to the current version. The procedure using the Data Management tool can eliminate steps.
- **Migrating in a phased approach** — You can load different portions of data at different times. For example, if you have both BMC Remedy Service Desk and BMC Remedy Change Management 6.0, you might choose to initially install BMC Remedy Service Desk, and load the appropriate data. At a later date, you could install BMC Remedy Change Management and load the appropriate data.
- **Migrating as a fresh installation** — You might want to treat migration as a fresh installation, for example if your earlier version of BMC Remedy ITSM includes many customizations, or if the existing data is of questionable quality. In this case, you can load your quality foundation data.

In each of these scenarios, you must perform the following steps. Detailed instructions are provided for most steps in following chapters.

1. Install BMC Remedy ITSM.
2. Export data from your earlier version of BMC Remedy ITSM or another tool you are using.
3. Import the data into the spreadsheets.
4. Clean up the data in the spreadsheets, which might include adding newly required information that is missing.
5. Use the Data Load Console to import (convert, load, validate, and promote) the data into BMC Remedy ITSM.
6. Optionally, use the data wizard to modify data to be appropriate to your implementation of BMC Remedy ITSM.

   Because of enhancements to BMC Remedy ITSM, you might want to modify some data. For example, now that categorizations are separate for products and operations, you might want to modify your categorizations.

Adding task groups and task group templates — Data Load Console

In this scenario, an administrator may want to add new task templates and task group templates to a system.

For more information about using the Data Load Console, see Importing data on page 77.

To add new task templates and task group templates using Data Load Console

1 Populate the `ProcessSetup-Task.xls` spreadsheet, using the following tabs:

- Task templates — Use the TMS-TaskTemplate tab.
- Task group templates — Use the TMS-TaskGroupTemplate tab.
- Template associations — Use the TMS-AssociationTemplate tab.
- Template flow control — Use the TMS-FlowTemplate tab.

Figure 3 on page 26 shows the TMS-TaskTemplate tab of the `ProcessSetup-Task.xls` spreadsheet filled in. Note that green fields (columns) are mandatory and orange fields must be filled in based on other fields. The rest of the fields are optional. The comment text at the top of the columns provides instructions on how to populate each field.

Figure 4 on page 26 shows the TMS-AssociationTemplate tab filled in and Figure 5 on page 27 shows the TMS-FlowTemplate tab filled in.

Figure 3: TMS-TaskTemplate tab filled in with Task Template details

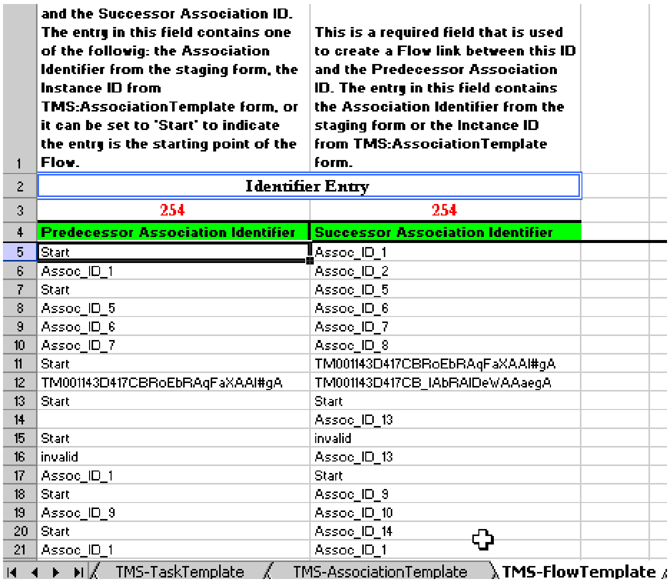
1	This is a required field that is used only as a unique refrence for data import function. The entry in this field contains the Task Template Identifier and it must be unique.	This required field contains the Task Template name.	This required field contains a brief summary of the Task Template.	This field contains the Category to catgorize this template. Values in this field can include (but are not limited to) entries in TMS:IntegrationConfiguration where Status is set Active and Use Task Template is set to "Yes" .	This field contains the Sub Category to further catgorize this Task Template.
2	Identifier Entry				
3	15	255	254	255	100
4	Task Template Identifie	Name	Summary	Category	SubCategory
5	Task_Temp_1	Task_1	Change Task 1 - Manual	Change Management System	misc menu selections
6	Task_Temp_2	Task_2	TMS Task 2 - Manual	Task Management System	misc menu selections
7	Task_Temp_3	Task_3	Change Task 3 - Manual	Change Management System	misc menu selections
8	Task_Temp_4	Task_4	Change Task 4 - Manual	Change Management System	not visible - Inactive
9	Task_Temp_5	Task_5	Change Task 5 - Manual	Change Management System	not visible - Inactive
10	Task_Temp_6	Task_6	Change Task 6 - Manual	Change Management System	not visible - Potential
11	Task_Temp_7	Task_7	Change Task 7 - Manual	Change Management System	not visible - Potential
12	Task_Temp_8	Task_8	Change Task 8 - Manual	Change Management System	misc menu selections
13	Task_Temp_9	Task_9	Change Task 9 - Manual	Change Management System	misc menu selections
14	Task_Temp_10	Task_10	Change Task 10 - Automatic	Change Management System	status - status reasons
15	Task_Temp_11	Task_11	Change Task 11 - Automatic	Change Management System	status - status reasons
16	Task_Temp_12	Task_12	Change Task 12 - Automatic	Change Management System	status - status reasons
17	Task_Temp_13	Task_13	Change Task 13 - Automatic	Change Management System	status - status reasons
18	Task_Temp_14	Task_14	Change Task 14 - Automatic	Change Management System	status - status reasons
19	Task_Temp_15	Task_15	TMS Task 15 - Automatic	Task Management System	status - status reasons

Figure 4: TMS-AssociationTemplate tab filled in with task group association details

1	This is a required field that is used only as a unique refrence for the data import function. The entry in this field contains the Association Identifier and it must be unique.	from the Staging form or the Task Group Template Instance ID from the Target form (for a template that is already loaded into the system). This is the Task Group Template ID for which the Association is being made.	being associated with the Task Group Template. The entry in this field contains the Task Group Template, Task Template Identifiers, or the Instance ID (for a template that	with one of the following numbers or words, according to the significance indicated in the following list: 0 or Task Group Template 1 or Task Template
2	Identifier Entry	Association Entry		
3	15	254	254	-
4	Association Identifier	Task Group Template Identi	Template Identifier	Template Type
5	Assoc_ID_1	Task_Grp_1	Task_Temp_1	Task Template
6	Assoc_ID_2	Task_Grp_1	Task_Temp_3	1
7	Assoc_ID_3	Task_Grp_3	Task_Temp_8	Task Template
8	Assoc_ID_4	Task_Grp_3	TM000F1F64B0456TaqQg	Task Template
9	Assoc_ID_5	Task_Grp_[illegible]	Task_Grp_1	Task Group Template
10	Assoc_ID_6	Task_Grp_4	Task_Temp_1a	Task Template
11	Assoc_ID_7	Task_Grp_4	Task_Temp_1b	Task Template
12	Assoc_ID_8	Task_Grp_4	Task_Grp_3	0
13	Assoc_ID_9	Task_Grp_5	TM000F1F64B0456TaqQg	Task Template
14	Assoc_ID_10	Task_Grp_5	TM001143D417CBACyBQ	Task Group Template
15	Assoc_ID_10a	Task_Grp_5	Task_Temp_1c	Task Template
16	Assoc_ID_11	TM001143D417CBACyBQwOG#BI	TM000F1F64B0456TaqQg	Task Template
17	Assoc_ID_12	TM001143D417CBACyBQwOG#BI	TM001143D417CBrSqBQ	Task Template
18	Assoc_ID_13	TM001143D417CBACyBQwOG#BI	Task_Temp_1d	Task Template
19	Assoc_ID_14	Task_Grp_9	Task_Temp_1a	Task Template
20	Assoc_ID_15	Task_Grp_9	Task_Temp_1b	Task Template
21	Assoc_ID_16	Task_Grp_9	Task_Temp_1c	Task Template
22	Error_ID_20	Task_Grp_1	Task_Temp_1	Task Template
23	Error_ID_20	Task_Grp_1	Task_Temp_1	Task Template
24		Task_Grp_1	Task_Temp_1	Task Template
25	Error_ID_21		Task_Temp_1	Task Template
26	Error_ID_22	Task_Grp_1		Task Template
27	Error_ID_23	Task_Grp_1	Task_Temp_1	bogus
28	Error_ID_24	Task_Grp_111111111	Task_Temp_1	Task Template
29	Error_ID_25	Task_Grp_1	Task_Temp_1111111111	Task Template
30	Error_ID_26	Task_Grp_1	Task_Temp_1	invalid
31	Error_ID_27	Task_Temp_1	Task_Grp_1	Task Group Template
32				

Instructions / TMS-TaskGroupTemplate / TMS-TaskTemplate / TMS-AssociationTemplate

Figure 5: TMS-FlowTemplate tab filled in with flow details



1	and the Successor Association ID. The entry in this field contains one of the followig: the Association Identifier from the staging form, the Instance ID from TMS:AssociationTemplate form, or it can be set to "Start" to indicate the entry is the starting point of the Flow.	This is a required field that is used to create a Flow link between this ID and the Predecessor Association ID. The entry in this field contains the Association Identifier from the staging form or the Inctance ID from TMS:AssociationTemplate form.
2	Identifier Entry	
3	254	254
4	Predecessor Association Identifier	Successor Association Identifier
5	Start	Assoc_ID_1
6	Assoc_ID_1	Assoc_ID_2
7	Start	Assoc_ID_5
8	Assoc_ID_5	Assoc_ID_6
9	Assoc_ID_6	Assoc_ID_7
10	Assoc_ID_7	Assoc_ID_8
11	Start	TM001143D417CBRoEbRAqFaXAAI#gA
12	TM001143D417CBRoEbRAqFaXAAI#gA	TM001143D417CB_IAbRAIDeWAAaegA
13	Start	Start
14		Assoc_ID_13
15	Start	invalid
16	invalid	Assoc_ID_13
17	Assoc_ID_1	Start
18	Start	Assoc_ID_9
19	Assoc_ID_9	Assoc_ID_10
20	Start	Assoc_ID_14
21	Assoc_ID_1	Assoc_ID_1

2 Convert, import, validate, and promote the data into the system.

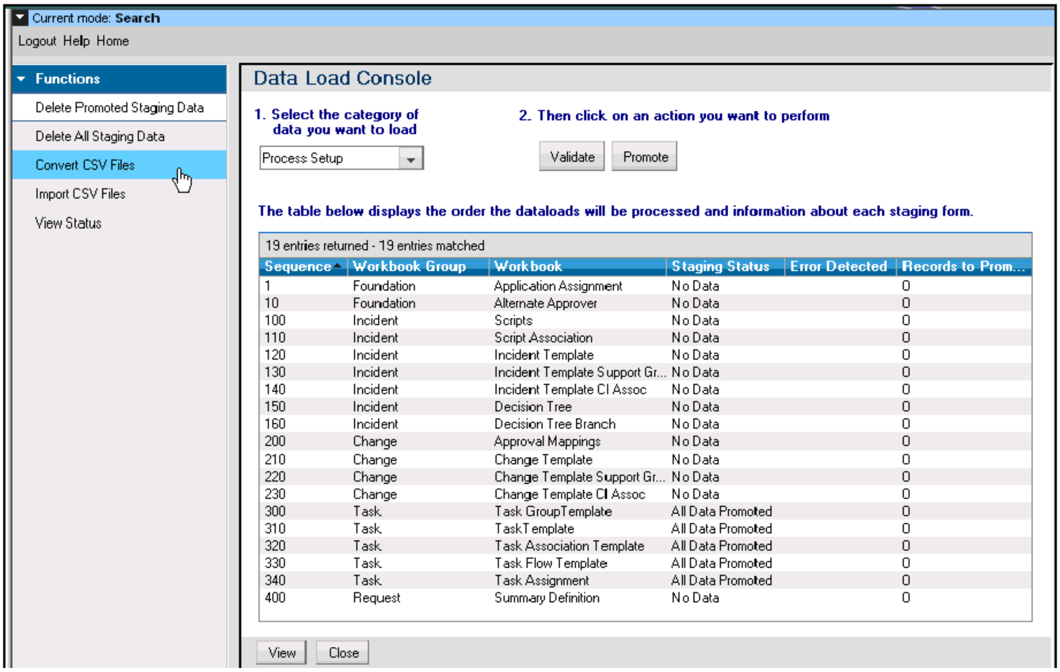
a From the Data Load Console, select Process Setup as the category of data and click **Convert CSV Files**.

Note

The security for macros in Excel must not be set to "Very High."

Figure 6 on page 28 shows the Process Setup data selected and **Convert CSV Files** being clicked.

Figure 6: Data Load Console with Process Setup data selected for loading



b In the Input Parameters window, enter the MS Excel Path and the Data Management Client install path, and click **Start**.

Note

If you browse to the directory on your system, make sure the path points to a directory and not a filename.

The CSV files are created in the ***ITSMDataManagementInstallDir*\7.6\CSVs \ProcessSetup** directory.

c Click **Import CSV Files**.

d In the Import Parameters window, enter the parameters, as required. For more information about entering the parameters, see Loading data from spreadsheets on page 78.

e Click **Start** to import the CSV files.

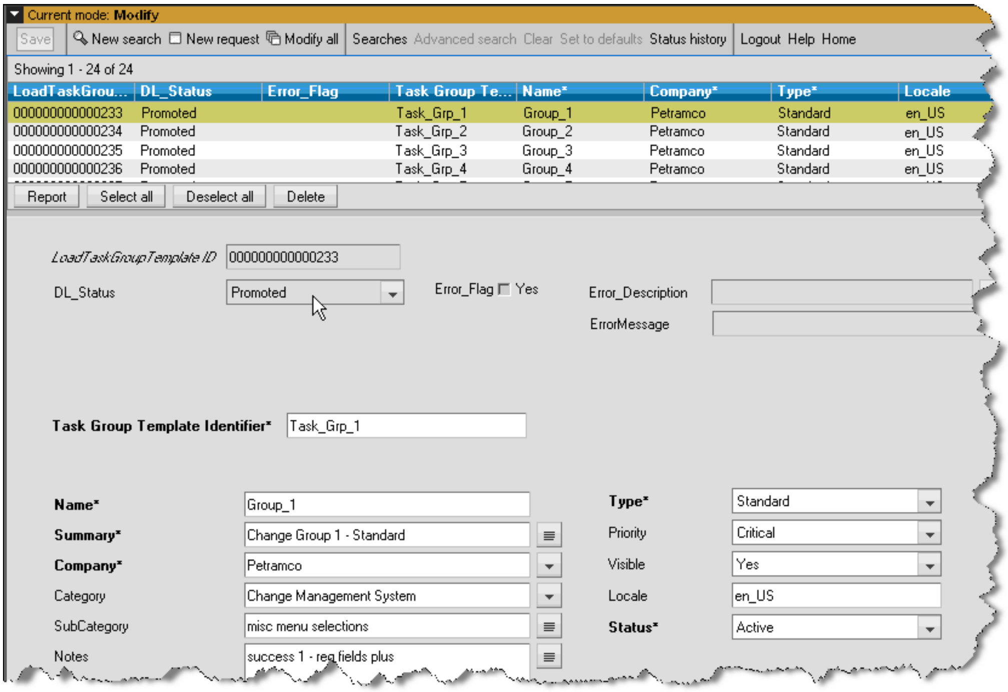
f From the Data Load Console, select Process Setup as the data category and click **Validate**.

g Click **View Status** to see the progress of the validation step. If errors occur, see Fixing validation errors on page 83 for information about how to fix the errors.

h After the validation step has completed, click **Promote**. When the status of all of the forms listed changes to Complete, the promotion step is complete.

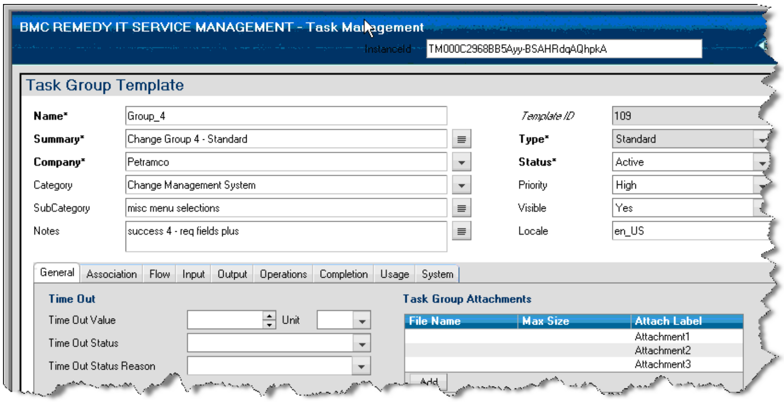
Figure 7 on page 29 shows the promoted task group data that you can access when you click **View Status**.

Figure 7: Promoted Task Group data



The System Administrator can then use the tasks and task group templates available in the Application Administration Console. Figure 8 on page 29 shows a task group template being accessed.

Figure 8: Task Group Template window accessing loaded task groups and tasks

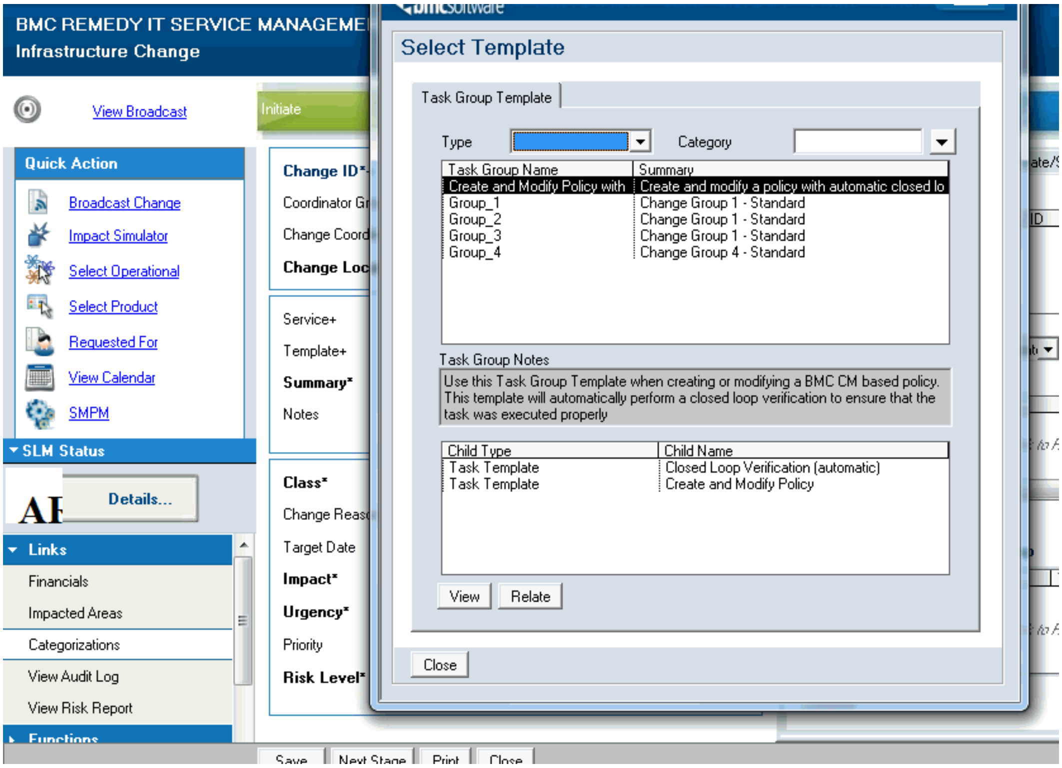


Once they are in the system:

- The Task Administrator can modify the tasks and task groups as applicable.
- The Support Staff can make change requests using these tasks and task groups.

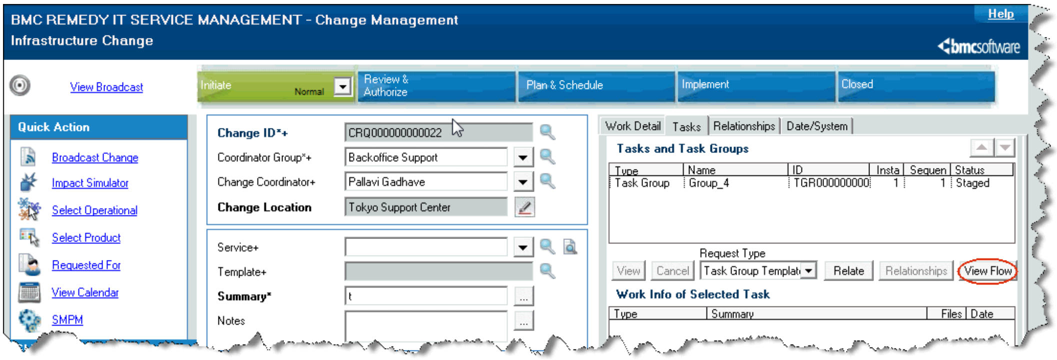
Figure 9 on page 30 shows task group templates being selected for a change request.

Figure 9: Loaded task group templates selected for a change request



- The Support Staff can also view task flow control on a change request. Figure 10 on page 30 shows the Process Flow Status window for a change request.

Figure 10: Process Flow Status for a change request



Adding another company to an existing installation of BMC Remedy ITSM — Data Load Console

In this scenario, an existing company acquires another company and wants to add it to the existing BMC Remedy ITSM system. In this case, the acquired company is added to the system keeping its original name (for legal purposes it was acquired as a separate entity). For more information about using the Data Load Console, see Importing data on page 77.

To add another company to an existing installation

1 Populate, load, and validate the new company information into the parent company's BMC Remedy ITSM system by using the Company.xls spreadsheet.

2 Migrate the company's existing ticketing information from their current system, which could be BMC Remedy ITSM or another ticketing system.

See the following procedure for detailed steps.

To populate, load, and validate the new company information

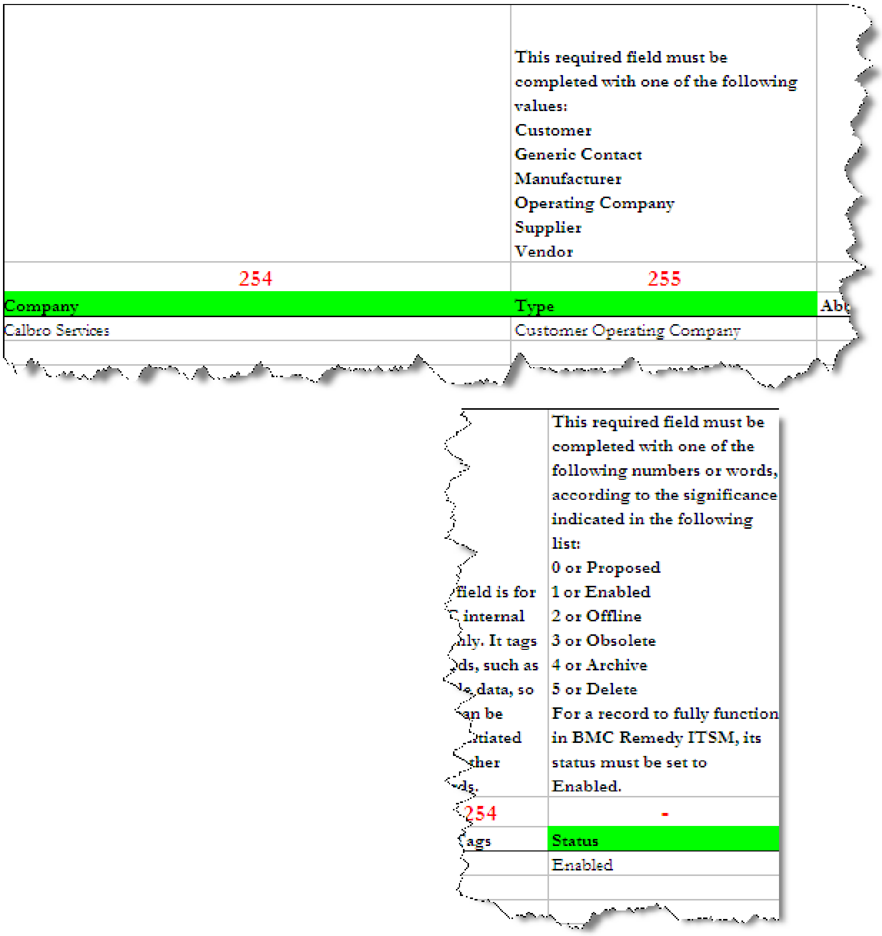
1 Populate the `Company.xls` spreadsheet, using the 01 COM-Company tab.

Figure 11 on page 32 shows the 01 COM-Company tab of the Company.xls spreadsheet populated with data. Green fields (columns) are mandatory, and orange fields must be filled in based on other fields. The rest of the fields are optional. The comment text at the top of the columns provides instructions on how to populate each field.

Note

For the base set of data, provide only the information for the required fields (highlighted in green).

Figure 11: 01 COM-Company tab with the new company's information



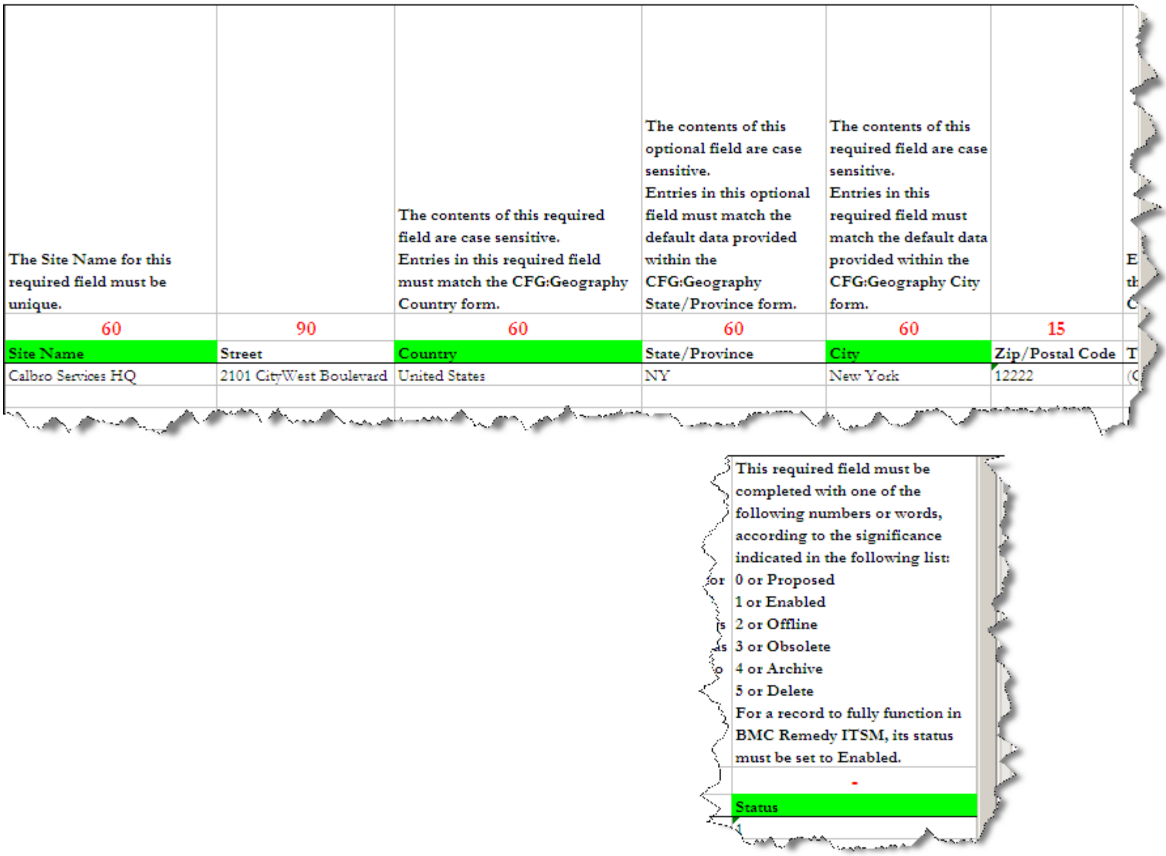
2 To load postal code information, fill in the information in the `Geography.xls` spreadsheet.

3 Fill in the site information in the 01 SIT-Site tab of the `Location.xls` spreadsheet. Figure 12 on page 33 shows the tab with data. See Table 9 on page 45 for a list of the fields, tabs, and spreadsheets used.

Note

For this example, some optional data is provided to make the information complete.

Figure 12: 01 SIT-Site tab with the new company's location information

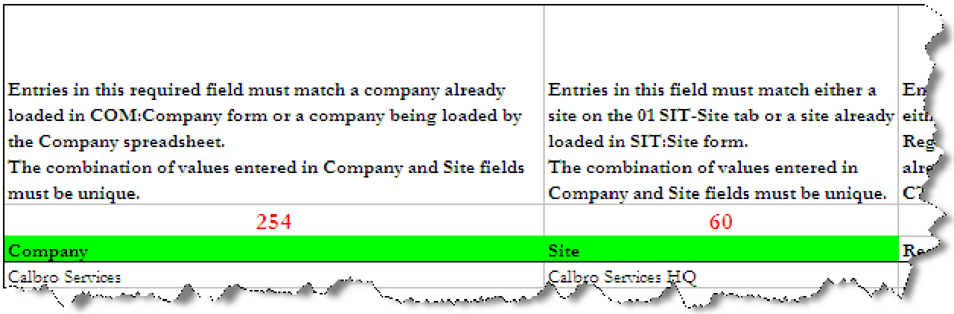


The Site Name for this required field must be unique.		The contents of this required field are case sensitive. Entries in this required field must match the CFG:Geography Country form.	The contents of this optional field are case sensitive. Entries in this optional field must match the default data provided within the CFG:Geography State/Province form.	The contents of this required field are case sensitive. Entries in this required field must match the default data provided within the CFG:Geography City form.		E th C
60	90	60	60	60	15	
Site Name	Street	Country	State/Province	City	Zip/Postal Code	T
Calbro Services HQ	2101 CityWest Boulevard	United States	NY	New York	12222	(C

This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Proposed 1 or Enabled 2 or Offline 3 or Obsolete 4 or Archive 5 or Delete For a record to fully function in BMC Remedy ITSM, its status must be set to Enabled.
-
Status
1

4 Fill in the 5 SIT-SiteCompanyAssociation tab in the `Location.xls` spreadsheet to associate company sites with the new company. These fields are shown in Figure 13 on page 33.

Figure 13: 5 SIT-SiteCompanyAssociation tab



Entries in this required field must match a company already loaded in COM:Company form or a company being loaded by the Company spreadsheet. The combination of values entered in Company and Site fields must be unique.	Entries in this field must match either a site on the 01 SIT-Site tab or a site already loaded in SIT:Site form. The combination of values entered in Company and Site fields must be unique.	En eith Reg alre C
254	60	
Company	Site	Re
Calbro Services	Calbro Services HQ	

Note

In addition to the fields shown above, you need to enter Enabled in the Status column as shown in Figure 12 on page 33.

5 Fill in the CTM-PeopleOrganization tab of the `PeopleOrg.xls` spreadsheet to define the organizations within the company. The spreadsheet is shown in Figure 14 on page 34.

In this example, one organization called Human Resources is loaded, and it has one department called Benefits. If you want to add multiple organizations, you would create a row for each organization and enter the same company name for each. If you want to add multiple departments to the Human Resources organization, you would create a row for each department and use the same company and organization names.

Note

There is no Enabled column on the CTM-PeopleOrganization tab of the `PeopleOrg.xls` spreadsheet so you do not need to fill this in.

Figure 14: CTM-PeopleOrganization tab

Entries in this required field must match a company already loaded in COM:Company form or a company being loaded by the Company.xls spreadsheet.			This field is for BMC internal use only. It tags records, such as sample data, so they can be differentiated from other records.	
254	60	255	254	60
Company	Organization	Description	DataTags	Department
Calbro Services	Human Resources			Benefits

6 Enter support group information by filling in the 01 CTM-SupportGroup tab of the `SupportGroup.xls` spreadsheet. For this example, one support organization called IT Support is loaded, and it has one support group name called Calbro Services IT Support and one support group role called Service Desk. If you wanted to add multiple support organizations, you would create a row for each support organization and enter the same company name for each.

Figure 15 on page 35 shows the `SupportGroup.xls` spreadsheet updated with the data for this example.

Figure 15: 01 CTM-SupportGroup tab

Entries in this required field must match a company already loaded in COM:Company form or a company being loaded by the Company.xls spreadsheet. The combination of Support Company, Support Organization, and Support Group Name must be unique.	The combination of Support Company, Support Organization, and Support Group Name must be unique.	The combination of Support Company, Support Organization, and Support Group Name must be unique.	This required field must be completed with one of the following values: Help Desk Tier 1 Tier 2 Tier 3 Line of Business Note: The support group role affects incident ownership. For details, see the BMC Remedy Service Desk: Incident Management User's Guide.	
254	60	60	30	
Support Company	Support Organization	Support Group Name	Support Group Role	Descrip
Calbro Services	IT Support	Calbro Services IT Support	Service Desk	

This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Yes 1 or No If you enter 0 or Yes, the support group is identified as a vendor group. Vendor support groups are available to be selected on the Vendor tab of the Incident form.	This field is for BMC internal use only. It tags records, such as sample data, so they can be differentiated from other records.	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Proposed 1 or Enabled 2 or Offline 3 or Obsolete 4 or Archive 5 or Delete For a record to fully function in BMC Remedy ITSM, its status must be set to Enabled.
-	254	-
Vendor Group	DataTags	Status
1		Enabled

Note

You would enter 0 in the Vendor Groups column to indicate that vendor groups should be used. Selecting Vendor indicates whether the support group is a vendor group that can be selected on the vendor tab of an Incident.

Note

The Support Group form has an On-Call Group selection that is not represented in the `SupportGroup.xls` spreadsheet. The Data Load utility sets this option to No by default, and if an On-Call record that is related to this Support Group is loaded, the Data Load utility sets the On-Call Group flag to Yes.

7 Fill in the following tabs in the People.xls spreadsheet to specify information such as login IDs, permissions, roles, and assignment availability:

- 01 CTM-PeopleTemplate
- 02 CTM-People
- 03 CTM-PeopleTemplatePG
- 04 CTM-PeopleTemplateSG

- 05 CTM-PeopleTemplateSFR

Tip

If you have only a few individuals for whom you need to load information, you can load people individually using different tabs in the `People.xls` spreadsheet rather than using the People templates. The tabs that you use to load people when using the templates are the same as the spreadsheet tabs listed in this step.

a To define a People template, fill out the 01 CTM-PeopleTemplate tab of the `People.xls` spreadsheet. Figure 16 on page 37 shows you the tab populated with the data being used in this example.

Note

When you load people, the purpose of this tab is only to specify the template information, such as name. The other fields, such as Company Name, are loaded from the 02 CTM-People tab. These other fields, however, are stored in the People Template (after loading), and are used when creating individual people records through the Application Administration console. The information in the 01 CTM-PeopleTemplate tab is not used at all; the information in the 02 CTM-People tab is used to load the person.

Figure 16: 01 CTM-PeopleTemplate tab

	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Proposed 1 or Enabled 2 or Offlined 3 or Obsolete 4 or Archive 5 or Delete For a record to fully function in ITSM, its status must be set to Enabled.	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 2000 or Office-Based Employee 3000 or Field-Based Employee 4000 or Home-Based Employee 5000 or Contractor 7000 or Customer 8000 or Prospect 10000 or Vendor		Entries in this required field must match a company already loaded in COM:Company form or a company being loaded by the Company spreadsheet.	Entries match loaded CTM:Pe form or loaded b spreads
255	-	-	50	254	
Template Name	Profile Status	Client Type	Job Title	Company	Organiz
Calbro-New-Company	1	2000		Calbro Services	

This required field identifies whether the person belongs to a support group. For ITSM application users, set this to 0 or Yes. For other people, set this to 1 or No.	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Yes 1 or No	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Sensitive 1 or Standard	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list. Note: This field is required if the Support Staff field is set to Yes. Setting this field to No means that the person will not show up in any assignee assignment menus, and cannot be assigned any tickets. Managers could be set up in this manner. 0 or Yes 1 or No	Entries in t match a on the SIT site being l Location s
-	-	-	-	
Support Staff	VIP	Client Sensitivity	Assignment Availability	Site
Yes	No	Standard	Yes	

This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Proposed 1 or Enabled 2 or Offline 3 or Obsolete 4 or Archive 5 or Delete For a record to fully function in ITSM, its status must be set to Enabled.
-
Template Status
1

b To define all the individuals in the new company, fill in the 02 CTM-People tab of the `People.xls` spreadsheet. Figure 17 on page 38 shows the tab populated with the data being used for this example.

Figure 17: 02 CTM-People tab

This field contains the person's last name.	This field contains the person's first name.	If this optional field is completed, it must use one of the following values: Mr. Ms. Mrs. Miss Dr.	This field contains the person's middle name.	This field is required to uniquely identify the person only if you load people attributes from any of the following tabs: 06 CTM-Login 07 CTM-PeopleWallet 08 CTM-PeopleHRAttendanceMgmt 09 CTM-PeopleHRTimemanagement 10 CTM-PeopleEducation 11 CTM-PeopleTravelProfile 12 CTM-PeopleBenefitInfo 13 CTM-PeopleITSkills 14 FIN-CostCenterUDAssociations 15 CTM-PeopleWorkLog If you do not load people attributes, you can leave this field blank.	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 2000 or Office-Based Employee 3000 or Field-Based Employee 4000 or Home-Based Employee 5000 or Contractor 7000 or Customer 8000 or Prospect 10000 or Vendor	The pers job tit
30	30	5	30	15		5
Last Name	First Name	Title	Middle Nan	Person ID	Client Type	Job
Allbrook	Allen				2000	
Mann	Mary				2000	
User	Task				2000	

rson's ID or yee	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Yes 1 or No	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Sensitive 1 or Standard	This required field identifies whether the person belongs to a support group. For ITSM application users, set this to 0 or Yes. For other people, set this to 1 or No. If you set this to 0 or Yes, you must also set the Remedy Login ID field.	1 or N Note Sup Only up in this is be as set up no a
	-	-	-	
e ID	VIP	Client Sensitivity	Support Staff	Ass
	No	Standard	Yes	
	No	Standard	Yes	
	No	Standard	Yes	

Entries in this required field must match a company already loaded in COM:Company form or a company being loaded by the Company.xls spreadsheet.
254
Company
Calbro Services
Calbro Services
Calbro Services

The eld forms umber	This required field is the Internet E-mail address.	the SI being sprea Note. Clie Emplo
	255	
s	Internet E-Mail	Site
	allen@bmc.com	
	mary@bmc.com	
	task@bmc.com	

d is for ernal tags ich as data, so ted f	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Proposed 1 or Enabled 2 or Offline 3 or Obsolete 4 or Archive 5 or Delete For a record to fully function in ITSM, its status must be set to Enabled.
	-
	Profile Status
	1
	1
	1

c To define the permission groups, fill in the 03 CTM-PeopleTemplatePG tab of the `People.xls` spreadsheet. Figure 18 on page 39 shows the tab populated with the data being used for this example.

Figure 18: 03 CTM-PeopleTemplatePG tab

This required field contains a valid permission group. For a list of valid permission groups, refer to the Data Management Administrator's Guide.	This required field must be completed with one of the following values, depending on the permission group: None Fixed Floating Read Not Applicable For a list of valid permission groups and the applicable license types, refer to the Data Management Administrator's Guide.	This field is for BMC internal use only. It tags records, such as sample data, so they can be differentiated from other records.	Entries in this required field must match a Template Name already loaded in the CTM:People_Template_SFR form or on the 01 CTM-PeopleTemplate tab. Note: The selections in a row apply to people who have the template selected.
30	30	254	255
Permission Group	License Type	DataTags	Template Name
Problem Master	Fixed		Calbro-New-Company
Purchasing User	Fixed		Calbro-New-Company
Receiving User	Not Applicable		Calbro-New-Company
Release Config	Not Applicable		Calbro-New-Company
Release Master	Not Applicable		Calbro-New-Company
Requester Console Config	Not Applicable		Calbro-New-Company
Requester Console Master	Not Applicable		Calbro-New-Company
Summary Definition Config	Not Applicable		Calbro-New-Company
Task Administrator	Not Applicable		Calbro-New-Company
Task Application Config	Not Applicable		Calbro-New-Company
Task Manager	Not Applicable		Calbro-New-Company
Task Process Config	Not Applicable		Calbro-New-Company

d To define the support groups, fill in the 04 CTM-PeopleTemplateSG tab of the `People.xls` spreadsheet. Figure 19 on page 40 shows the tab populated with the data being used for this example.

Figure 19: 04 CTM-PeopleTemplateSG tab filled in

Entries in this required field must match an organization already loaded in the CTM:SupportGroup form or an organization being loaded by the SupportGroup.xls spreadsheet.	Entries in this required field must match a support group already loaded in the CTM:SupportGroup form or support groups being loaded by the SupportGroup.xls spreadsheet.	This required field must be completed with one of the following values: Associate Member Member	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Yes 1 or No Setting this to No removes the user's name from the Assignee menu	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Yes 1 or No For each template, there must be only one support group record with the default set to Yes.
60	60	-	-	-
Support Organization	Support Group Name	Support Group Association R	Assignment Availability	Default Group
IT Support	Calbro Services IT Support	Member	Yes	Yes

Entries in this field must match a Template Name already loaded in the CTM:PeopleTemplate_SFR form or on the 01 CTM-PeopleTemplate tab. Note: The selections in a row apply to people who have the template selected.
255
Template Name
Calbro-New-Company

e To define the functional roles, fill in the 05 CTM-PeopleTemplateSFR tab of the `People.xls` spreadsheet. Figure 20 on page 41 shows the tab populated with the data being used for this example.

Figure 20: 05 CTM-PeopleTemplateSFR

Entries in this required field must match a support company already loaded in the CTM:SupportGroup form or a support company being loaded by the SupportGroup.xls spreadsheet.	Entries in this required field must match a support organization already loaded in the CTM:SupportGroup form or a support organization being loaded by the SupportGroup.xls spreadsheet.	Entries in this required field must match a support group already loaded in the CTM:SupportGroup form or a support group being loaded by the SupportGroup.xls spreadsheet.	This required field must be completed with one of the following numbers: 14000 for Availability Manager 15000 for Incident Manager 7000 for Infrastructure Change Approver 6000 for Infrastructure Change Assignee 5000 for Infrastructure Change Manager 16000 for Problem Manager 18000 for Release Manager 17000 for Service Level Manager 2000 for Support Group Admin 3000 for Support Group Lead 4000 for Support Group Manager 19000 for Broadcast Submitter	This required field must be completed with one of the following numbers or words, according to the significance indicated in the following list: 0 or Yes 1 or No Setting this to No prevents any assignment menus that are dependent on functional roles from displaying this user's name for selection. For example, the Change Manager Assignment fields will only show users with Infrastructure Change Manager role.	Entries in this field must match a Template Name already loaded in the CTM:PeopleTemplate form or on the 01 CTM-PeopleTemplate tab. Note: The selections in a row apply to people who have the template selected.
254	60	60	-	-	255
Company	Support Organization	Support Group Name	Functional Role Alias	Assignment Availability	Template Name
Calbro Services	IT Support	Calbro Services IT Support	Availability Manager	Yes	Calbro-New-Company
Calbro Services	IT Support	Calbro Services IT Support	Broadcast Submitter	Yes	Calbro-New-Company
Calbro Services	IT Support	Calbro Services IT Support	Infrastructure Change Manager	Yes	Calbro-New-Company
Calbro Services	IT Support	Calbro Services IT Support	Incident Manager	Yes	Calbro-New-Company
Calbro Services	IT Support	Calbro Services IT Support	Problem Manager	Yes	Calbro-New-Company
Calbro Services	IT Support	Calbro Services IT Support	Release Manager	Yes	Calbro-New-Company
Calbro Services	IT Support	Calbro Services IT Support	Support Group Lead	Yes	Calbro-New-Company

f To define the login information, fill in the 06 CTM-Login tab of the `People.xls` spreadsheet. Figure 21 on page 41 shows the tab populated with the data being used for this example.

Figure 21: 06 CTM-Login tab filled in

			Entries in this field must match a company already loaded in COM:Company form or a company being loaded by the Company.xls spreadsheet.	
254	40	40	254	40
Login Type	Host Name	Login ID	Company	Setu
Fixed	CALHOST1	allen	Calbro Services	
Fixed	CALHOST1	mary	Calbro Services	
Fixed	CALHOST1	task	Calbro Services	

l is for ernal It tags such as ata, so be iated er	Entries in this required field must match a person ID on the 02 CTM-People tab or a person ID already loaded in the CTM:People form. Only one record can exist per person.
54	15
s	Person ID
	PPL000000000114
	PPL000000000115
	PPL000000000159

8 Import, validate, and promote the data into the system.

a From the Data Load Console, select Foundation as the category of data and click **Convert CSV Files**.

b In the Input Parameters window, if the defaults are not correct, change the paths and click **Start**.

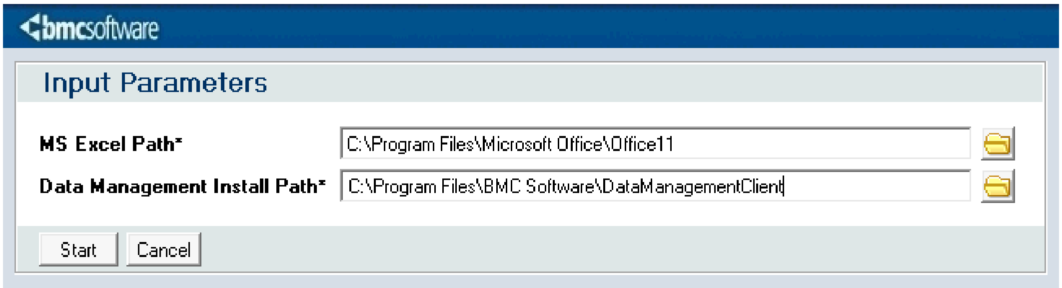
Note

If you browse to the directory on your system, make sure the path points to a directory and not a filename.

The CSV files are created in the ***ITSMDataManagementInstallDir*\7.6\CSVs\ProcessSetup** directory.

Figure 22 on page 42 shows the Input Parameters window with the default locations for Microsoft Excel and the Data Management installation path.

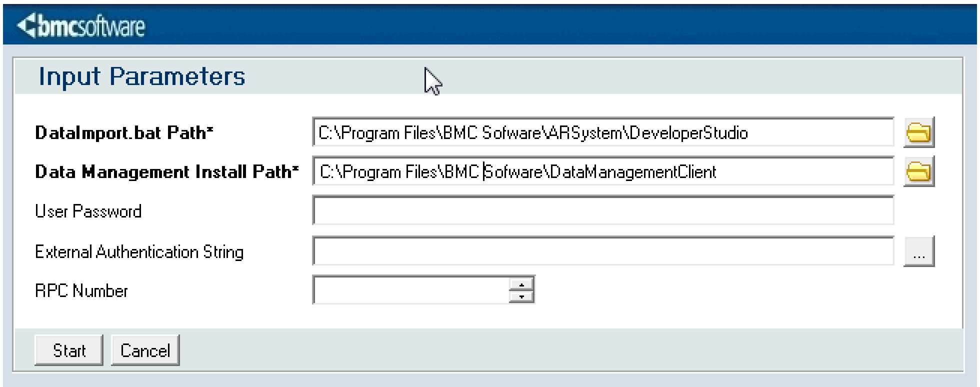
Figure 22: Input Parameters window with default paths



c Click **Import CSV Files**.

Figure 23 on page 42 shows the Input Parameters window that is displayed when you click **Import CSV Files**.

Figure 23: Input Parameters window displayed after clicking Import CSV Files



d In the Import Parameters window, enter the parameters, as required. For more information about entering these parameters, see Loading data from spreadsheets on page 78.

Note

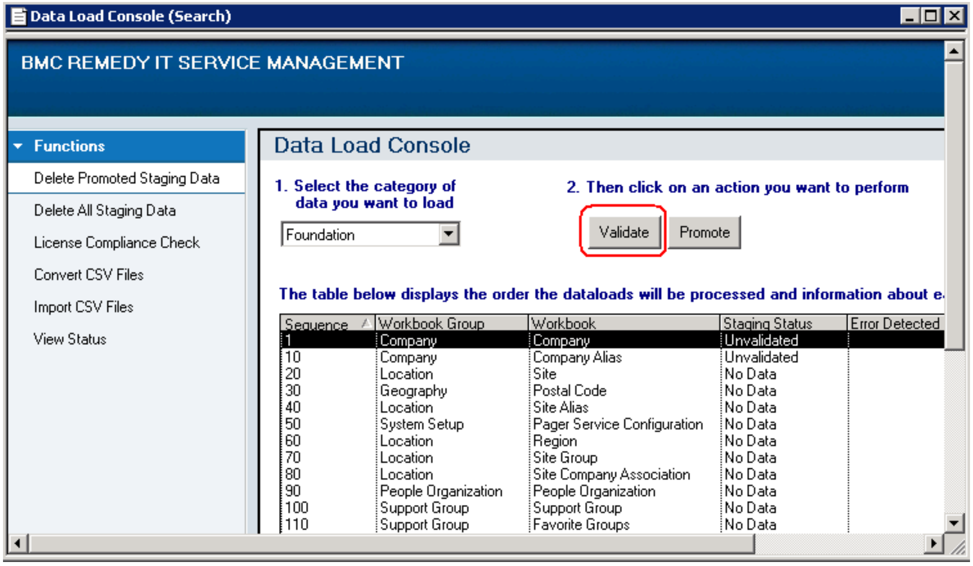
If you browse to the directory on your system, make sure the path points to a directory and not a filename.

e Click **Start** to import the CSV files.

A message box is displayed when the import function has completed.

f From the Data Load Console, select Foundation as the data category and click **Validate**. Figure 24 on page 43 shows the Validate button on the Data Load Console.

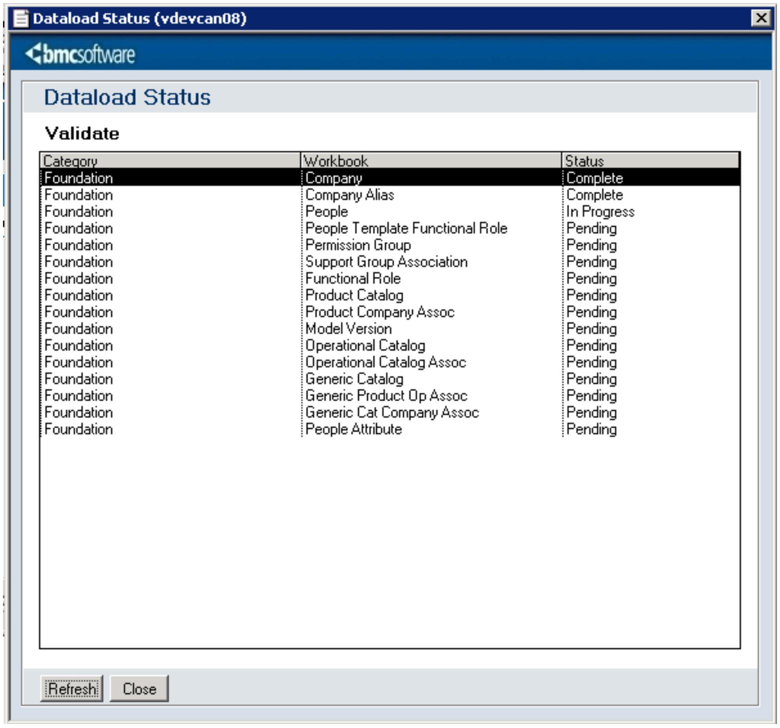
Figure 24: Data Load Console showing the Validate button



The Dataload Status window opens automatically showing the progress of the validation step.

Figure 25 on page 44 shows the Dataload Status window. If errors occur, see Fixing validation errors on page 83 for information about how to fix the errors.

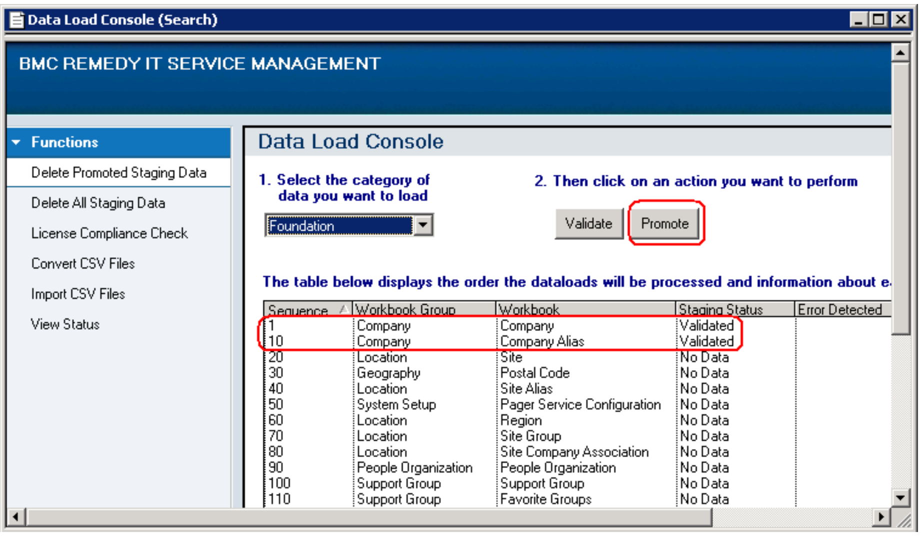
Figure 25: Dataload Status window



g After the validation step has completed, close the Dataload Status window.

h From the Data Load Console, select Foundation as the data category and click **Promote**. Figure 26 on page 45 shows the Promote button and the data that was successfully validated in the previous steps.

Figure 26: Data Load Console showing Promote button and validated data



When the status of all of the forms listed changes to Complete, the promotion step is complete.

9 Click **View Status** to verify that the dataload has successfully completed.

The system is then ready for use by employees in the newly added company.

Summary of spreadsheets and fields filled in to add a new company

In summary, this example has walked you through how to fill in the spreadsheets required to add a new company to an installation of BMC Remedy ITSM. The Base set of sample data for adding the company table summarizes the spreadsheets, tabs, and fields that were required to be filled in to do this.

Table 9: Base set of sample data for adding the company

Information type	Spreadsheet	Tabs	Fields	Required?
Company details	Company.xls	01 COM-Company	Company	Required
			Type	Required
			Status	Required

Information type	Spreadsheet	Tabs	Fields	Required?
Site information	Location.xls	01 SIT-Site	Site Name	Required
			Country	Required
			State/Province	Not required
			City	Required
			Zip / Postal Code	Not required
			Time Zone	Not required
			Status	Required
	Location.xls	5 SIT-SiteCompanyAssociation	Company	Required
			Site	Required
			Status	Required
Organization / department information	PeopleOrg.xls	CTM-PeopleOrganization	Company	Required
			Organization	Required
			Department	Required
Support group information	SupportGroup.xls	01 CTM-SupportGroup	Support Company	Required
			Support Organization	Required
			Support Group Name	Required
			Support Group Role	Required
			Vendor Group	Required
			Status	Required

Information type	Spreadsheet	Tabs	Fields	Required?
People information	People.xls	01 CTM-PeopleTemplate	Template Name	Required
			Profile Status	Required
			Client Type	Required
			Company	Required
			Support Staff	Required
			VIP	Required
			Client Sensitivity	Required
			Assignment Availability	Required
			Template Status	Required
		02 CTM-People	Last Name	Required
			First Name	Required
			Client Type	Required
			Company	Required
			Internet E-mail	Required
			Profile Status	Required
		03 CTM-PeopleTemplatePG	Permission Group	Required
			License Type	Required
			Template Name	Required
		04 CTM-PeopleTemplateSG	Support Organization	Required
			Support Group Name	Required
			Support Group Association Role	Required
			Assignment Availability	Required
			Default Group	Required
			Template Name	Required
		05 CTM-PeopleTemplateSFR	Company	Required
			Support Organization	Required
			Support Group Name	Required
			Functional Role Alias	Required
			Assignment Availability	Required
			Template Name	Required

Information type	Spreadsheet	Tabs	Fields	Required?
People information (continued)	People.xls (continued)	06 CTM-Login	Login Type	Required
			Host Name	Required
			Login ID	Required
			Person ID	Required

Changing a user’s login ID — Data Wizard Console

In this scenario, a user's recent name change requires a change in that user's ID.

For more detailed information about using the Data Wizard Console, see Using the data wizard to modify data on page 91.

To use the data wizard to change a user ID

1 Launch the Data Wizard Console:

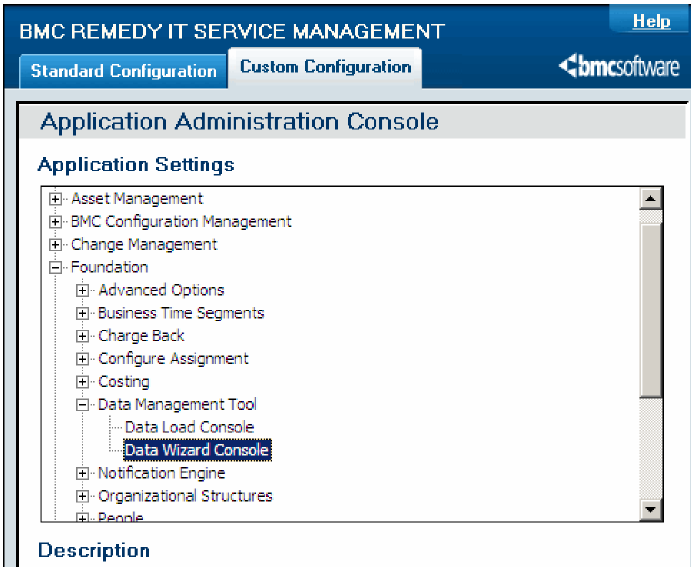
   a Choose **Start => Programs => BMC Software => AR System => BMC Remedy User**.

   b Open the BMC ITSM Application Administration Console.

   c Expand Foundation and Data Management Tool as shown in Figure 27 on page 49.

d Double-click **Data Wizard Console** as shown in Figure 27 on page 49.

Figure 27: Launching Data Wizard Console from the Application Administration Console



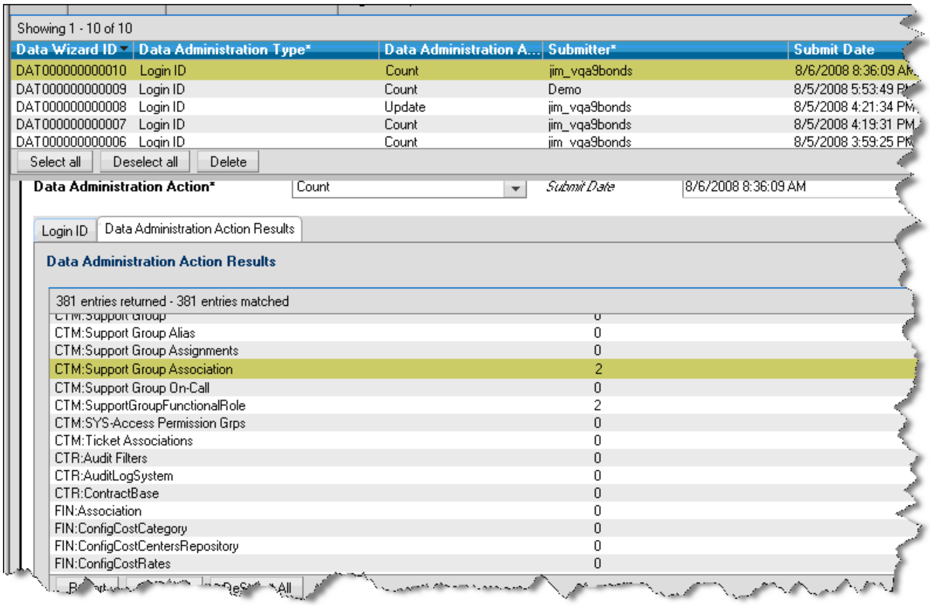
2 To determine how many records will be affected by the login ID update, run the count function in the data wizard and viewing the log after the count has completed.

a Select Count target values as the action you want to perform.

b Select Login ID as the type of data to be acted upon.

Figure 28 on page 50 shows the Data Wizard Status Screen with the results log for the count operation.

Figure 28: Data Wizard Console status screen showing the results log



3 Depending on the number of records that will be affected, choose a time to perform the update. If a large number of records are affected, you might want to schedule the update to run in off hours.

In the example shown in Figure 28 on page 50 two forms are affected: CTM: SupportGroupAssociation and CTM: SupportGroupFunctionalRole. Each form has two login IDs that have to be updated.

4 Run the update function in the data wizard. Figure 29 on page 51 shows the Update target values function and the Login ID data type selected. Figure 30 on page 51 shows the next screen with the Login ID details for the update specified.

Figure 29: Data Wizard Console showing update for Login ID selection

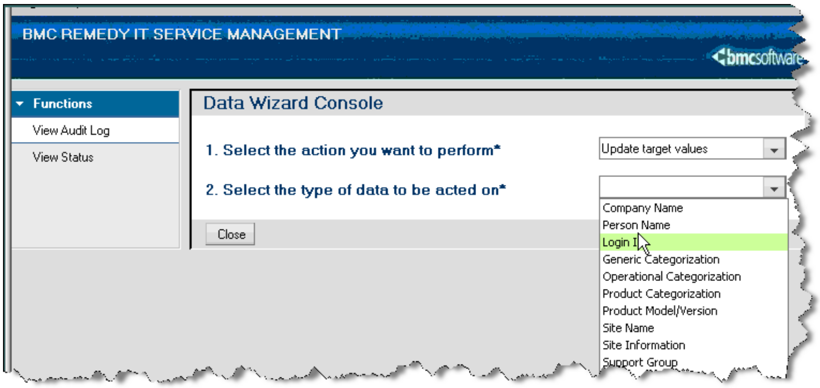
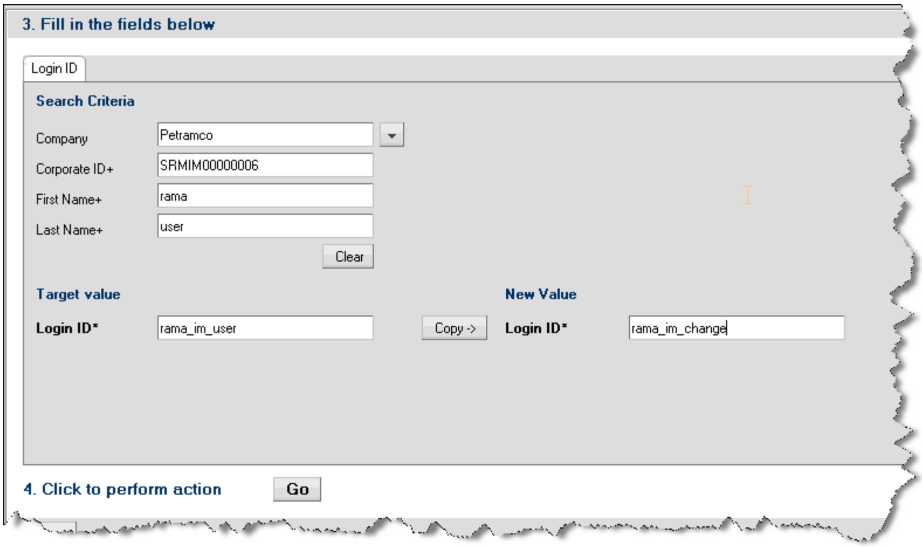


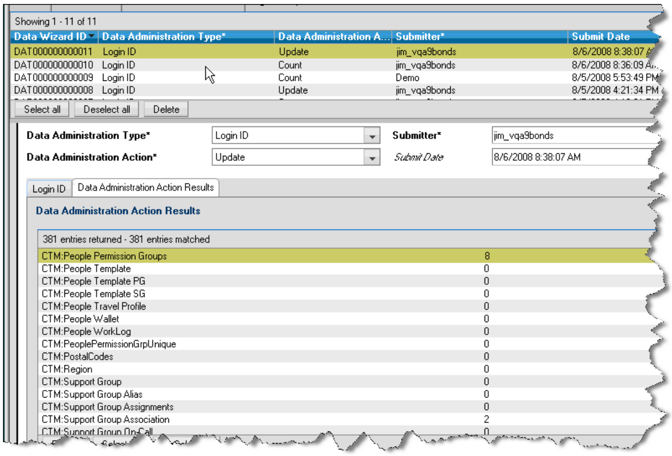
Figure 30: Next screen showing Login ID details for the update



5 View the resulting status and log to see how many records were updated.

Figure 31 on page 52 shows the results screen after the Update Login ID function has run. The number of records updated for each form should match the count from step 2.

Figure 31: Results of the Update Login ID function



The individual can now sign in using the new login ID.

Reorganizing a department and changing support group names — Data Wizard Console

In this scenario, your company has reorganized its IT department and needs to rename some support groups.

For more detailed information about using the Data Wizard Console, see Using the data wizard to modify data on page 91.

To use the data wizard to change support group names

1 Launch the Data Wizard Console:

   a Open the BMC ITSM Application Administration Console.

   b Expand Foundation and Data Management Tool.

   c Double-click **Data Wizard Console** as shown in Figure 27 on page 49.

2 Determine how many records updating support group names will affect by running the count function in the data wizard and viewing the log after the count has completed.

a From the Select the action you want to perform list, select Count target values.

b From the Select the type of data to be acted upon list, select Support Group.

Figure 32 on page 53 shows the Update target values function and the Support Group data type selected. Figure 33 on page 53 shows the next screen with the Support Group details for the update specified.

Figure 32: Data Wizard Console showing update for Support Group selection

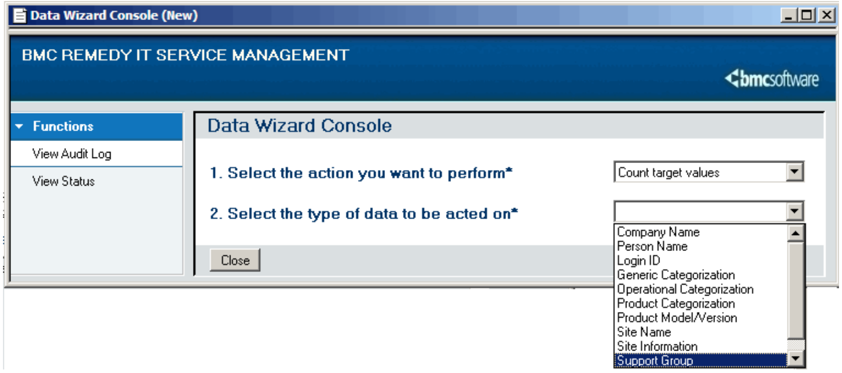
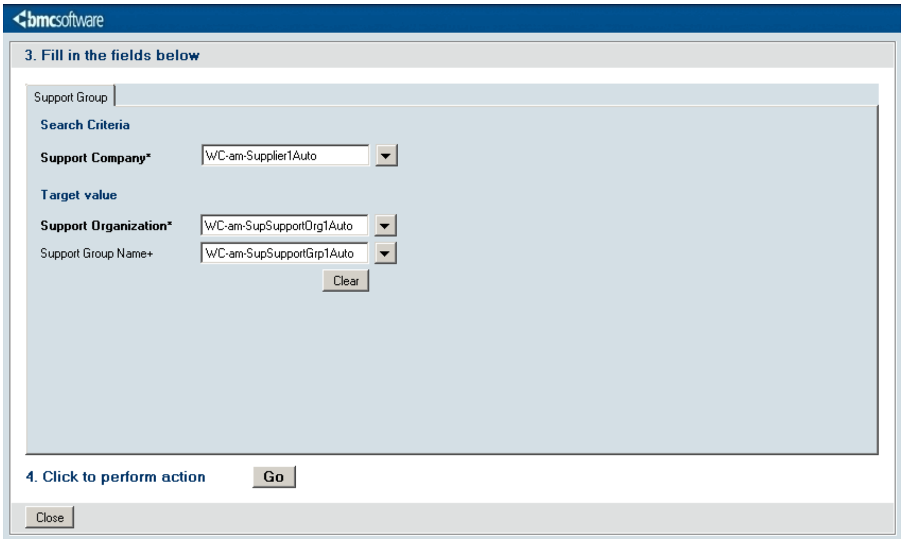


Figure 33: Next screen showing Support Group details for the update



3 Depending on the number of records that will be affected, choose a time to perform the update. If a large number of records are affected, you might want to schedule the update to run in off hours.

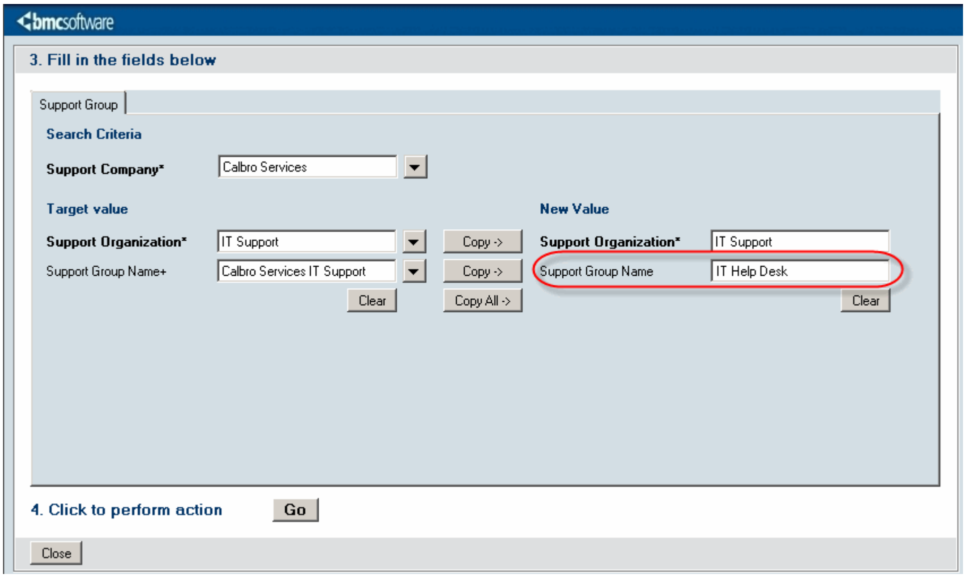
4 Run the update function in the data wizard:

a From the Select the action you want to perform list, select Update target values.

b From the Select the type of data to be acted upon list, select Support Group.

Figure 34 on page 54 shows the Support Group form that is displayed and the data entered for the update.

Figure 34: Support Group form with data entered for update



5 View the resulting status and log to see how many records were updated.

The results screen shows the updates made after the Update Support Group function has run. The number of records updated for each form should match the count from step 2.

The employees can now use BMC Remedy ITSM under their new support group.

Completing the spreadsheets

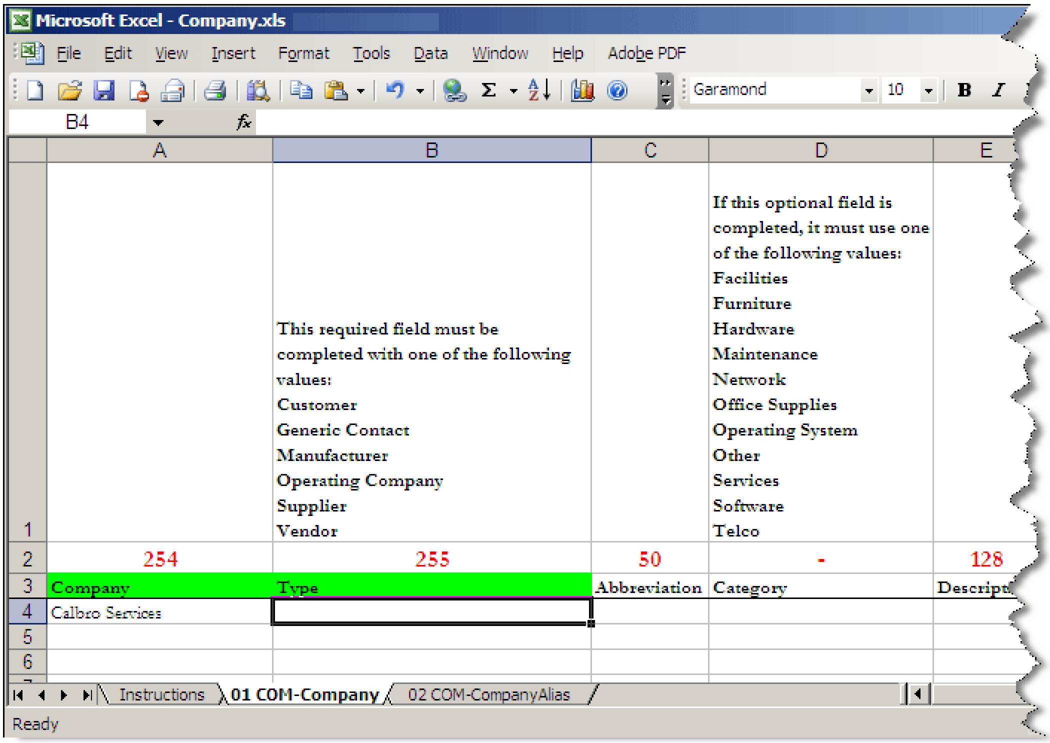
Before you can import data, you must complete the appropriate data load spreadsheets.

Understanding the spreadsheets

This section provides an overview of the data load spreadsheets. Additional instructions are provided within the spreadsheets.

Each workbook contains related spreadsheets. The first tab provides instructions for using the spreadsheet. Each of the subsequent tabs corresponds to the form into which the data is populated.

Figure 35: Example spreadsheet



Column headings provide instructions for completing that column of the spreadsheets according to the following standards:

- A green column heading indicates a required field.
- An orange column heading indicates a field that might be required, depending on a value set in another column.
- Text in the first row provides instructions for entering data in the column.

The number above each column heading is the database length of the field. This number corresponds to the number of bytes in the field. For English and other single-byte languages, the number of bytes is the same as the number of characters. Double-byte languages use two bytes per character.

Validation on each column indicates if you entered data longer than this maximum allowed length.

The successful validation of field lengths in Microsoft Excel spreadsheets for multi-byte languages does not guarantee that the data will be imported successfully. The data import process uses the number of bytes when importing to fields while Excel validates the number of characters.

Note

This validation occurs only when you type in the spreadsheet cells. If you bring in data by copying and pasting from another source or by importing data into the spreadsheet, you bypass the validation.

Populating data in the spreadsheets

This section provides general instructions for populating data in the data load spreadsheets, which you use to load data into the system. To make it easier for you to distribute the spreadsheets to others to complete, each spreadsheet includes instructions specific to the spreadsheet.

Note

When using the spreadsheets, leave the tabs in their original order. Deleting, inserting, or changing the order of tabs causes errors when you perform the steps to convert the spreadsheets to CSV files.

Tip

Microsoft Excel has a limit of 65,536 rows in a spreadsheet, which limits the number of records that you can include in a single spreadsheet. To deal with this issue, copy the contents from the installation directory (the default is C:\Program Files\BMC Software\DataManagementClient) to multiple new directories.

If you have installed the client files in a directory that is not in the default installation path, copy them to multiple new directories. The number of required directories depends on the number of rows of data (as a multiple of 65,536). For example, if you need three directories, you might set them up as:

C:\Program Files\BMC Software\DataManagementClient1

C:\Program Files\BMC Software\DataManagementClient2

C:\Program Files\BMC Software\DataManagementClient3

For forms that have too many records for a single spreadsheet, enter the data in multiple spreadsheets and in multiple directories. If you are not loading records in all spreadsheets, you can delete the spreadsheets from the extra directories.

You can run batch files from the separate directories concurrently, which enhances performance for loading data from the CSV files into the staging forms.

Locating the data load spreadsheets

This topic describes where to find the data load spreadsheets.

Use the data load spreadsheets that are in the 7.6 folder in the Data Management Client install directory. By default, the installation path is **C:\Program Files\BMC Software\DataManagementClient**.

Tip

If you set your macro security to medium or high, then you can choose to disable your macros so you can open them in Excel without running them.

Loading data into an existing system

If you are updating an existing BMC Remedy IT Service Management (BMC Remedy ITSM) system (for example, loading data for a new department or location) some data already exists in your BMC Remedy ITSM system. Do not re-enter data that is already loaded into your system. You must complete spreadsheets only for the new data that you are loading.

Loading data into a new system

To load only the minimum standard configuration, complete only the spreadsheets listed in the Spreadsheets and tabs required to load minimum standard configuration table.

If you want to load all of the foundation data for a new BMC Remedy ITSM 7.6.0x system (which forms the foundation for all other data in BMC Remedy ITSM), or some subset of this data, see also Table 10 on page 58. BMC recommends that you start with spreadsheets that are self-contained and do not have dependencies on data in other spreadsheets. BMC recommends that you start with `Company.xls`.

What dependencies are there?

When entering data, be aware that data in one spreadsheet can depend on data that is either entered on another spreadsheet or already loaded in the system. For example, the company field, which is entered on most spreadsheets, must match a company either created in `Company.xls` or already loaded on the system. These dependencies are noted in the instructions in the spreadsheets.

Table 11 on page 60 also lists dependencies among the foundation spreadsheets.

The spreadsheets are listed in Table 10 on page 58 in the order that the corresponding data is validated and promoted in the Data Load Console. You might choose to complete spreadsheets in this sequence.

Spreadsheets required for minimum standard configuration

This section describes the spreadsheets that you need to load for a minimum standard configuration.

Table 10: Spreadsheets and tabs required to load minimum standard configuration

Required spreadsheets	Required tabs	Description
`Company.xls`	01 COM-Company	Use this tab to specify companies.
`Location.xls`	01 SIT-Site	Use this tab to specify sites.
	5 SIT-SiteCompanyAssociation	Use this tab to associate each site to a company. Sites are physical locations.
`SupportGroup.xls`	01 CTM-SupportGroup	Use this tab to specify support groups.

Required spreadsheets	Required tabs	Description
`People.xls` **Note:** You do not need to use all the People tabs listed here. If you are loading people using templates, use the tabs that apply to templates; otherwise use the tabs that apply to loading people individually. See People, permissions, and support groups on page 61 for more information.	01 CTM-PeopleTemplate	To load support staff, you can use people templates. On this tab you specify the template names that are referenced on the other tabs. You can also load people individually using the 02 CTM-People, 18 CTM-PeoplePermissionGroups, 19 CTM-SupportGroupAssociation, and 20 CTM-SupportGrpFunctionalRole tabs. Use the other tabs in `People.xls` to set the permission groups, support groups, and support group functional roles for each people template, for individuals, or for both. For more information about how to use people templates to load individuals into the system and assign them permissions, see People, permissions, and support groups on page 61.
	02 CTM-People	Use this tab to load people. For more information about how to load people into the system and assign them permissions, see People, permissions, and support groups on page 61. **Note:** Do *not* use data load to load Demo and Appadmin users, because these are existing administrator accounts.
	03 CTM-PeopleTemplatePG	Use this tab to specify the BMC Remedy ITSM application permission groups for each people template. For more information about how to load people into the system and assign them permissions, see People, permissions, and support groups on page 61.
	04 CTM-PeopleTemplateSG	Use this tab to specify the support groups for each people template. For more information about how to load people into the system and assign them permissions, see People, permissions, and support groups on page 61.

Required spreadsheets	Required tabs	Description
People.xls (continued)	05 CTM-PeopleTemplateSFR	Use this tab to specify the support group functional roles for each people template. For more information about how to load people into the system and assign them permissions, see People, permissions, and support groups on page 61.
	18 CTM-PeoplePermissionGroups	Use this tab to specify the ITSM Application permissions for each individual.
	19 CTM-SupportGroupAssociation	Use this tab to specify the support groups for each individual.
	20 CTM-SupportGrpFunctionalRole	Use this tab to specify the support group functional roles for each individual.

Set of foundation data load spreadsheets

Foundation data, loaded by the foundation data load spreadsheets, forms the foundation for all other data in BMC Remedy ITSM. Dependencies among foundation data load spreadsheets are shown in the following table.

Table 11: Dependencies among foundation data load spreadsheets

Data entered in this spreadsheet	Depends on data entered in these spreadsheets							
	Company	Geography	SystemSetup	People Org	Location	Financials	Support Group	Catalogs
Location	Yes	Yes						
People	Yes							
SupportGroup	Yes		Yes					
Financials	Yes							
People	Yes			Yes	Yes	Yes	Yes	Yes
ProductCatalog	Yes							
Operational Catalog	Yes							
GenericCatalog	Yes							Yes

Process setup data, loaded by the process-setup data load spreadsheets, depends on foundation data.

Transaction data, loaded by the transaction setup data load spreadsheets, depends on foundation data. If you are loading transaction data, make sure that you consider information in the `Transactional-SharedComponents.xls` file. This spreadsheet includes tabs for shared child forms.

If you are loading task information for change or incident requests, consider the following points:

- You can load both task groups and tasks.
- You can load only one level of task group. This means that a task group can contain tasks, but cannot contain other task groups.
- Unless you are loading ad hoc tasks, you must specify the Task Template ID.

To populate data in the spreadsheet

1 Complete the spreadsheets according to the instructions on the Instructions tab and in the column headings.

  All leading and trailing spaces and tab characters are stripped when the data is imported into staging forms.

2 Save the file to the spreadsheet folder where the Data Management tool was installed. The default path is:

  C:\Program Files\BMC Software\DataManagementClient

Spreadsheet usage tips

This section documents some tips for using the spreadsheets.

People, permissions, and support groups

Permission Groups, Support Group Associations, and Support Group Functional Roles (hereafter referred to as permissions) can be assigned as follows:

- Using templates. For detailed information about using templates, see Assigning permissions and permission groups using templates on page 63.
- On an individual basis. For detailed information about assigning permissions to individuals, see Assigning permission groups and permissions on an individual basis on page 65
- Using a combination of templates and assigning directly to individuals.

Note

When you assign permission groups and permissions using both templates and on an individual basis, the template permissions are assigned first and the individually assigned permissions are appended to these. If the same permission is specified in a template as well as for an individual, a validation error occurs. Remove the duplication to fix the error.

The `People.xls` spreadsheet contains the following tabs that you use to define people and their permissions:

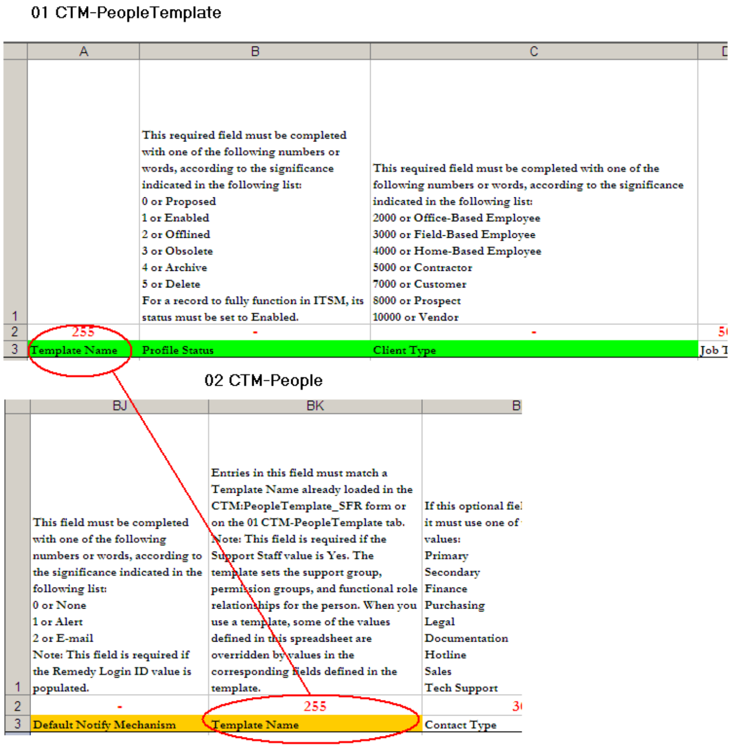
- The 01 CTM-PeopleTemplate tab is used to load existing People templates from previous systems. However People templates are also used for linking Permission Groups, Support Groups, and Functional Roles to a People Record that is being loaded. See Assigning permissions and permission groups using templates on page 63 for more information.
- The 02 CTM-People tab defines people that are being loaded into the system.
- The 03 CTM-PeopleTemplatePG tab includes columns for Permissions Group and License Type, both of which are required fields. Use this tab to assign permission groups using templates.
- The 04 CTM-PeopleTemplateSG tab is used to associate support groups to a person record in the 01 CTM-PeopleTemplate tab. Use this tab to assign permission support groups using templates.
- The 05 CTM-PeopleTemplateSFR tab is used to load a support group functional role for a person record in the 01 CTM-PeopleTemplate tab. Use this tab to assign functional roles using templates.
- The 17 CTM-PeopleAccessRestrictions tab is used to provide company record access to a person record in the 02 CTM-People tab. Use this tab to assign access to company records on an individual basis.
- The 18 CTM-PeoplePermissionGroups tab includes columns for Permissions Group and License Type, both of which are required fields. Use this tab when you assign permission groups directly to an individual.
- The 19 CTM-SupportGroupAssociation tab is used to associate support groups with a person record in the 02 CTM-People tab. Use this tab to assign support groups on an individual basis.
- The 20 CTM-SupportGrpFunctionalRole tab is used to load a support group functional role for a person record in the 02 CTM-People tab. Use this tab to assign functional roles on an individual basis.

Assigning permissions and permission groups using templates

Templates are used as follows:

- People templates make it easier to load people who fulfill the same role within a given support group. See the steps in the procedure that follows to understand how to fill in the People.xls spreadsheet to load People records using templates.
- When you load people, the purpose of the 01 CTM-PeopleTemplate tab is only to specify the template information, such as name. The other fields, such as Company Name, are loaded from the 02 CTM-People tab. These other fields, however, are stored in the People Template after promotion and are used when you create individual people records through the Application Administration console. Figure 36 on page 63 shows how the Template Name field relates the 01 CTM-PeopleTemplate tab to the 02 CTM-People tab.

Figure 36: Template Name field relationship



Defining permissions using templates

To define permissions using templates

1 Specify a Template Name on the 01 CTM-PeopleTemplate tab in `People.xls`, and the rest of the required fields.

Note

The information in the 01 CTM-PeopleTemplate tab is not used; the information in the 02 CTM-People tab is used to load the person.

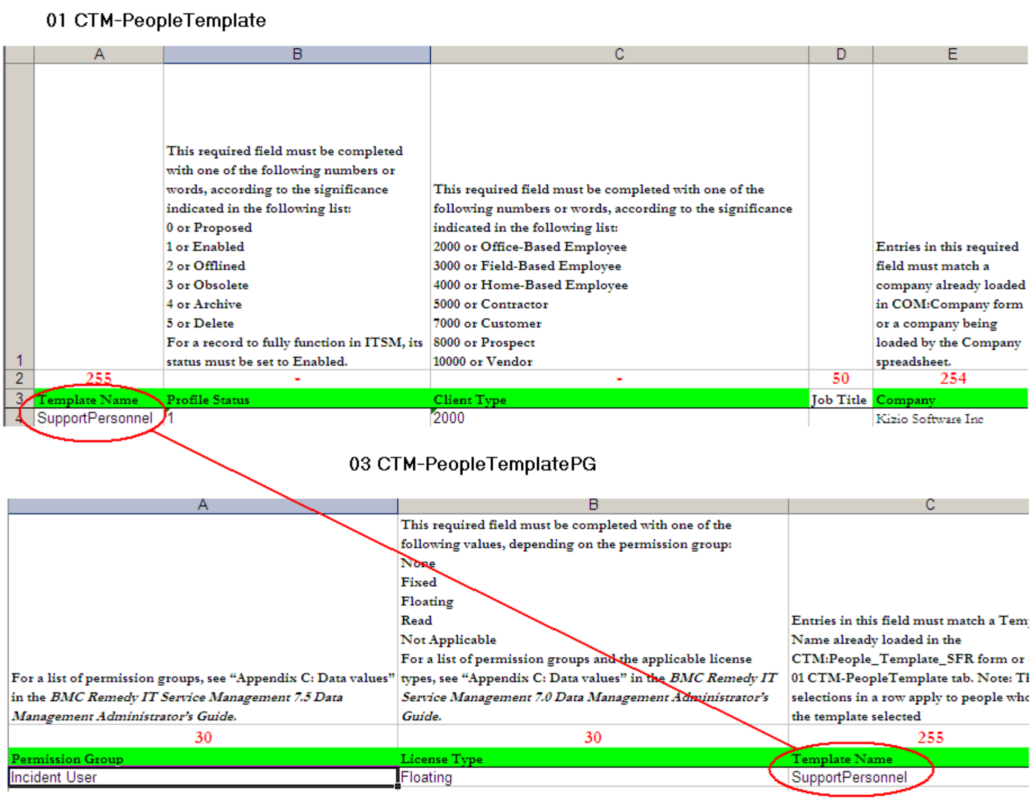
The template information is joined to the people information by the template name, as shown Figure 37 on page 64.

After a template has been defined in the 01 CTM-PeopleTemplate tab and the People records have been defined on the 02 CTM-People tab, you can create a permission record using the 03 CTM-PeopleTemplatePG tab.

2 Enter the template name specified in the 01 CTM-PeopleTemplate tab in the Template Name column of the 03 CTM-PeopleTemplatePG tab. You must enter one permission per spreadsheet row (many permissions to one template are allowed).

Figure 37 on page 64 shows an example of permission groups being assigned to a group of people, with the records being linked to each other by the Template Name.

Figure 37: Permission Groups assigned to many people using a template



3 Verify that the permissions that you are assigning are not already defined in the 18 CTM-PeoplePermissionGroups tab, which are used to define permissions on an individual basis.

4 Repeat steps 1 through 3 to specify support groups using the 04 CTM:PeopleTemplateSG tab and functional roles using the 05 CTM:PeopleTemplateSFR tab.

Assigning permission groups and permissions on an individual basis

You can also assign permissions on an individual basis by using the following tabs:

- 18 CTM-PeoplePermissionGroups
- 19 CTM-SupportGroupAssociation
- 20 CTM-SupportGrpFunctionalRole

Note

The permissions that you assign individually are appended to any permissions assigned by a template. If there are duplicate permissions, a validation error occurs.

To define the permissions on an individual basis

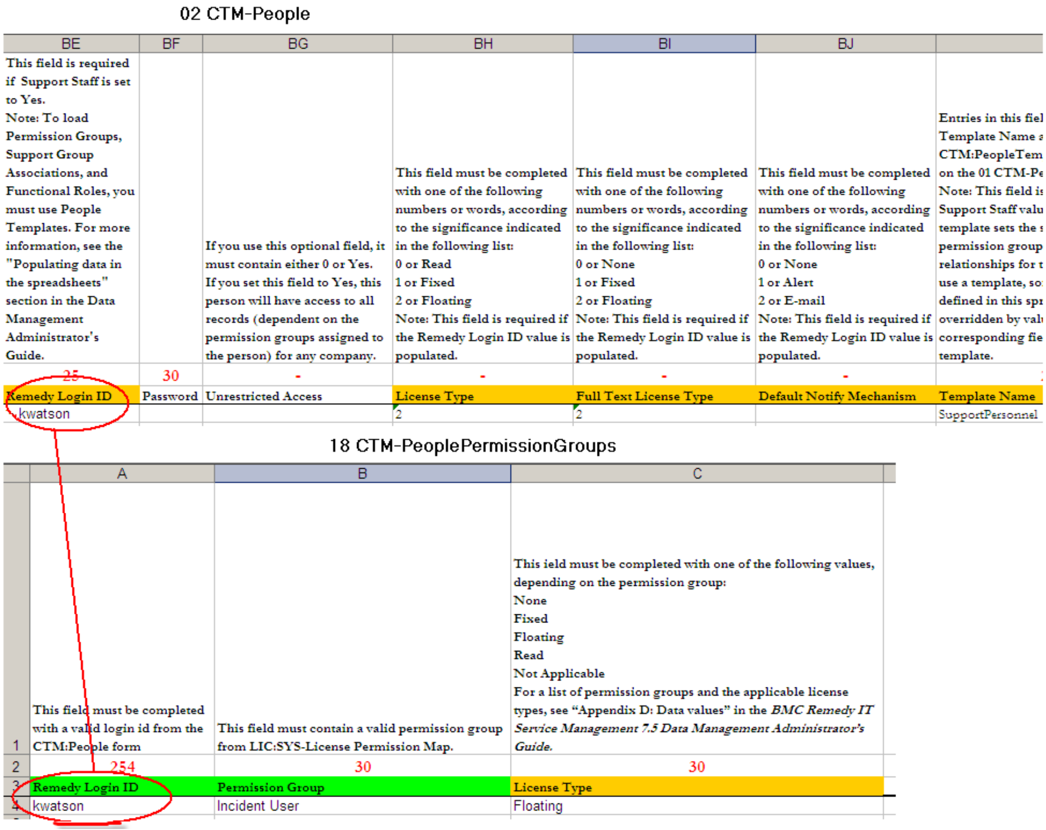
1 Fill in the information for the individual on the 02 CTM-People tab.

2 Based on the type of permissions that you want to assign, fill in any of the following tabs:

- 18 CTM-PeoplePermissionGroups to assign permission groups. This tab is linked to the 02 CTM-People tab by the Remedy Login ID column.
- 19 CTM-SupportGroupAssociation to assign support groups. This tab is linked to the 02 CTM-People tab by the Login ID column.
- 20 CTM-SupportGrpFunctionalRole to assign support group functional roles. This tab is linked to the 02 CTM-People tab by the Login ID column.

Figure 38 on page 66 shows an example of permission groups being assigned to an individual, with the records being linked to each other by the Remedy Login ID.

Figure 38: Permission groups assigned to an individual



3 Verify that the permissions you that are assigning are not already defined in any templates that you are using to assign permissions.

4 Repeat steps 1 through 3 for all the individuals to whom you want to assign permissions on an individual basis.

Task templates and process templates

This section describes:

- The limitations that exist for task template validation.
- How you use task templates to load tasks and the associations between their child objects, such as tasks and task groups, versus how you use process templates to load processes and the associations between their child objects, such as tasks and task groups.

Limitations of task template validation

No validation is performed on the automatic fields on the TMS-TaskTemplate tab of the Process Setup-Task.xls spreadsheet. However, the automatic command is validated. This behavior corresponds to the same behavior that exists on the TMS:Task Template form.

Differing uses of task and process templates

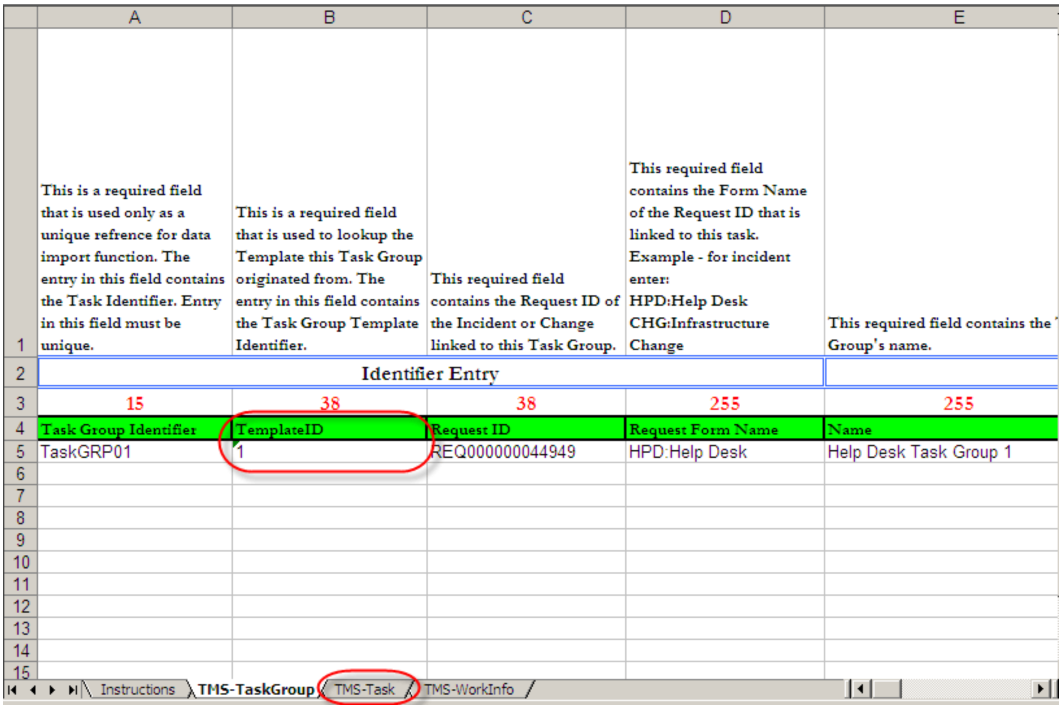
The system behaves differently when it uploads child tasks and task groups using templates defined in the `ProcessSetup-Task.xls` and `Transactional-Task.xls` spreadsheets. The upload works for each as follows:

- `ProcessSetup-Task.xls` — When you upload data referencing a Task Group Template in the Task Group Template Identifier field on the TMS-TaskGroupTemplate tab, any associated task groups and tasks are also uploaded automatically.

- `Transactional-Task.xls` — When you upload tickets referencing a Task Group Template in the Template ID field on the TMS-TaskGroup tab, associated tasks are *not* uploaded automatically. This is because tasks defined by the task group template may already be in progress in the system. To upload a task group template's tasks, you need to explicitly define the tasks on the TMS-Task tab in the `Transactional-Task.xls` spreadsheet.

Figure 39 on page 68 shows the `Transactional-Task.xls` spreadsheet with the Template ID field referencing a template and also the TMS-Task tab which must be filled to make sure any associated tasks are also uploaded.

Figure 39: Transactional-Task.xls spreadsheet showing Template ID and TMS-Task tab

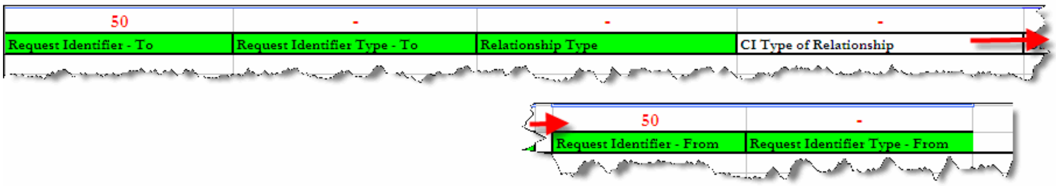


Using Transactional-SharedComponents.xls to populate the Service or CI fields in an incident, problem, known error, or change

To populate the Service and CI fields of an incident, problem, and known error, or to update the Service field only of a change, you use the fields in the SHR-Associations tab of the Transactional-SharedComponents.xls spreadsheet.

Figure 40 on page 69 describes the fields on the SHR-Association tab of Transactional-SharedComponents.xls.

Figure 40: Fields on the SHR-Associations tab of Transactional-SharedComponents.xls



Note

Fill in the Type of Relationship field only to create an association that updates the Service or CI. Fill in the rest of the fields (required fields are highlighted in green) to complete the association, even if you do not fill in the Type of Relationship field.

What do I fill in to update the Service and CI fields?

To use the SHR-Associations tab of the Transactional-SharedComponents.xls spreadsheet to update the Service and CI fields on the HPD:Help Desk, PBM:Problem Investigation, PBM:Known Error, form or just the Service field on the CHG:Infrastructure Change form, you need to enter one of the following values in the CI Type of Relationship field, depending on whether you want to update the Service or CI field. If you want to update both fields, you need to create two rows specifying each of the following values once in each row.

- Service CI (or 1000) to update the Service field

WARNING

If you enter Service CI (or 1000) for incidents, problems, known errors, and changes only, the Product Categorization information is updated based on the information already defined for the service.

- CI (or 2000) to update the CI field

WARNING

If you enter CI (or 2000), for incidents only the Resolution Product Categorization information is updated based on the information already defined for the CI.

For an example of entering data in the spreadsheet to populate the Service and CI fields of an incident, see Example: Updating the Service and CI fields for an incident on page 71.

Note

The SHR-Associations tab of the Transactional-SharedComponents.xls spreadsheet is also used to define associations, including CI associations. Leave the Type of Relationship field blank to create this type of association.

If you enter a value in the Type of Relationship field, the values that you enter in the Request Identifier - To and Request Identifier - From fields are used to retrieve the data that will be entered in the Service and CI fields for the incident. Depending on whether you are updating the Service or CI fields, the values that you enter in these fields are different. Table 12 on page 70 describes what to enter in these fields in each of these situations.

Table 12: Values to enter in the Request Identifier - To and From fields

Fields being updated	Spreadsheet field	Description of value to enter
Note: The Request Identifier - To and Request Identifier - From fields are interchangeable, which means you can enter the values described below in either field, depending on whether you are updating the Service or CI field.		
Service	Request Identifier - To	The incident, change, problem, or known error number.
	Request Identifier - From	The Reconciliation ID that identifies the business service CI to load into the Service field.
CI	Request Identifier - To	The incident number.
	Request Identifier - From	The Reconciliation ID that identifies the CI to load into the CI field.

If you entered a value in the Type of Relationship field (to indicate you want to update either the Service or CI fields on an incident, problem, known error, or change), in addition to the fields described in Table 12 on page 70, you should update the rest of the fields on the spreadsheet as follows:

- Request Identifier Type - To—the Request Identifier Type. Always should contain one of the following values:
  - 9000 (or Incident) to indicate that you are updating an incident record
  - 20000 (or Problem Investigation) to indicate that you are updating a problem investigation record
  - 16000 (or Known Error) to indicate that you are updating a known error record
  - 12000 (or Infrastructure Change) to indicate that you are updating an infrastructure change record
- Relationship Type—Always should contain the value Related to or 35000.
- Request Identifier Type—Always should contain the value 6000 or Configuration Item to indicate that the information is being retrieved from a CI.

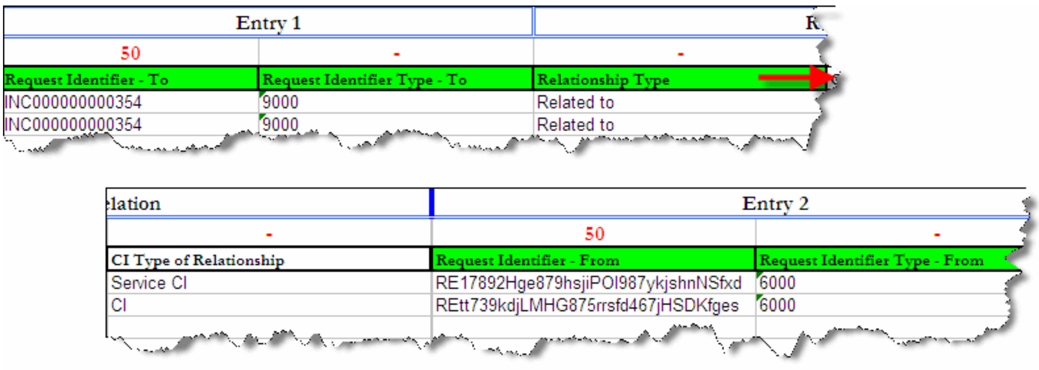
Example: Updating the Service and CI fields for an incident

For this example, you want to load data for incident INC000000000354 and populate the Service and CI fields for this incident at the same time. You want to populate these fields as follows:

- Service with System Access
- CI with BMCHDNODE

Figure 41 on page 71 shows you how to fill in the spreadsheet. Because you are populating both the Service and CI fields on the incident, you need to fill in two rows on the spreadsheet.

Figure 41: SHR-Associations tab filled in



Entry 1		
50	-	-
Request Identifier - To	Request Identifier Type - To	Relationship Type
INC000000000354	9000	Related to
INC000000000354	9000	Related to

lation	Entry 2	
-	50	-
CI Type of Relationship	Request Identifier - From	Request Identifier Type - From
Service CI	RE17892Hge879hsjiPOI987ykjshnNSfxd	6000
CI	REtt739kdjLMHG875rrsfd467jHSDKfges	6000

Table 13 on page 72 explains the values in the fields on the spreadsheet shown in Figure 41 on page 71.

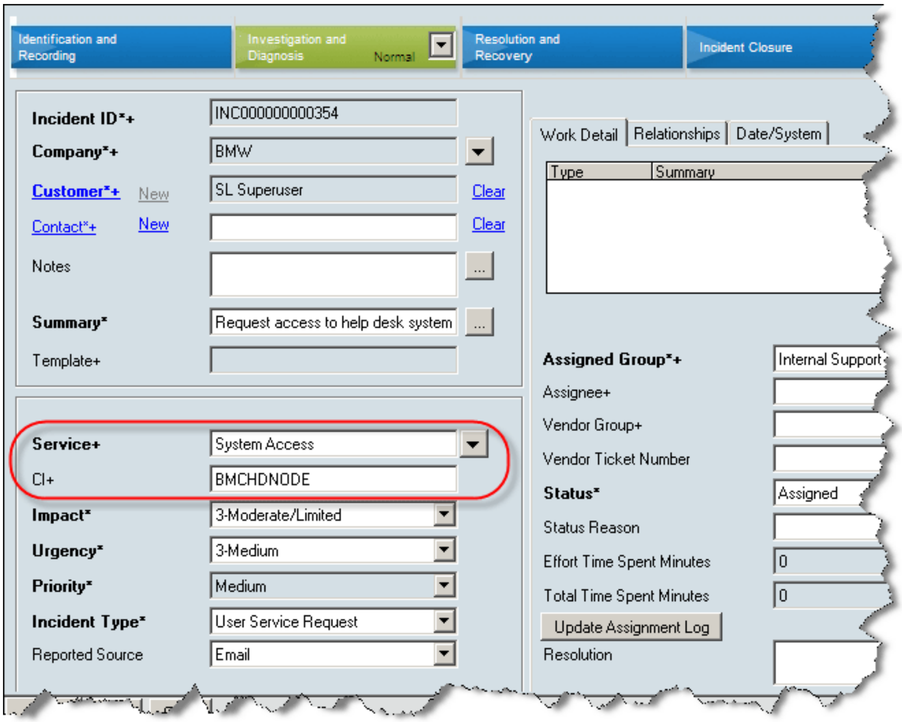
Table 13: Spreadsheet fields and values used to populate the Service and CI fields

Spreadsheet field	Value	Explanation
Row 1 of spreadsheet example		
CI Type of Relationship	Service CI	Indicates that the Service field of the incident should be updated.
Request Identifier - To	INC000000000354	The incident number identifying the incident to update.
Request Identifier Type - To	9000	Indicates that an incident record is to be updated.
Relationship Type	Related to	Must be `Related to` when something is specified in the CI Type of Relationship field.
Request Identifier - From	RE17892Hge879hsjiPOI987ykjshnNSfxd	The Reconciliation ID that identifies the service to load into the Service field. In this case, this reconciliation ID loads `System Access` into the Service field of the incident.
Request Identifier Type - From	6000	Indicates that the information to populate the Service field is coming from a CI.
Row 2 of spreadsheet example		
CI Type of Relationship	CI	Indicates that the CI field of the incident should be updated.
Request Identifier - To	INC000000000354	The incident number identifying the incident to update. This is the same number that was used for Row 1 since both the Service and CI fields are being populated for this incident.
Request Identifier Type - To	9000	Indicates that an incident record is to be updated.
Relationship Type	Related to	Must be `Related to` when something is specified in the CI Type of Relationship field.

Spreadsheet field	Value	Explanation
Request Identifier - From	REtt739kdjLMHG875rrsfd467jHSDKfge s	The Reconciliation ID that identifies the CI to load into the CI field. In this case, this reconciliation ID loads BMCHDNODE into the CI field of the incident.
Request Identifier Type - From	6000	Indicates that the information to populate the CI field is coming from a CI.

The following figure shows incident INC000000000354 with the Service and CI fields populated with the information uploaded by the spreadsheet in Figure 41 on page 71.

Figure 42: Incident form showing Service and CI fields



CTM:LoadSupportGroupAssociation with Support Staff set to Yes

The dataload utility loads data hierarchically, in its order of dependence. Data on which other data completely depends is loaded first, and data on which other data does not depend is loaded last. The rest of the data is loaded somewhere in the middle of this continuum based on its dependency.

For example, CTM:People data is loaded before CTM:Support Group Association data, because there is a hard dependency on the CTM:People data. However, when a People record has Support Staff set to Yes, at least one support group association has to exist. Because CTM:Support Group Association data is loaded after CTM:People data, it is not possible to validate if at least one valid support group association exists or not. Therefore, when setting Support Staff to Yes, you need to manually check that one support group association will also exist after all of the data has been loaded.

Uploading work log attachments

The spreadsheets allow attachments to be loaded into forms that have work logs. Use the Form and spreadsheet matrix for uploading work log attachments table to identify the spreadsheet, tab, and fields that you need to fill in for each form. The steps that follow the table provide instructions for uploading attachments to the work log and provide clearer instructions, and also describe the syntax to use for the Attachment 1 through Attachment 3 fields.

Table 14: Form and spreadsheet matrix for uploading work log attachments

<table>
<tr><th>Form</th><th>Spreadsheet</th><th>Tab</th><th>Fields to fill in</th></tr>
<tr><td>AST:WorkLog</td><td>Transactional-Asset.xls</td><td>AST-WorkLog</td><td rowspan="6">■ Attachment 1
■ Attachment 2
■ Attachment 3</td></tr>
<tr><td>CHG:WorkLog</td><td>Transactional-Change.xls</td><td>CHG-WorkLog</td></tr>
<tr><td>CTR:WorkLog</td><td>Transactional-Contract.xls</td><td>CTR-WorkLog</td></tr>
<tr><td>■ HPD:WorkLog
■ SRM:WorkInfo</td><td>Transactional-Incident.xls</td><td>HPD-WorkLog</td></tr>
<tr><td>■ PBM:Known Error WorkLog
■ PBM:Investigation WorkLog</td><td>Transactional-Problem.xls</td><td>■ PBM-KnownErrorWorkLog
■ PBM-InvestigationWorkLog</td></tr>
<tr><td>TMS:WorkInfo</td><td>Transactional-Task.xls</td><td>TMS-WorkInfo</td></tr>
</table>

To fill in the spreadsheets to upload attachments

1. Open the spreadsheet associated with the form to which you want to upload attachments as identified in Table 14 on page 74.

2. Select the tab identified for that spreadsheet.

3 Scroll to the fields (columns) Attachment 1, Attachment 2, and Attachment 3.

4 Identify one attachment for each field, starting with the Attachment 1 field, up to a maximum of three attachments. Use the following syntax:

`...CSVs\Transaction\Attachments\`*`subDirectory`*`\`*`fileName.extension`*

Note

Creating a subdirectory is optional. If you do create one, it must be under the ...CSVs \Transaction\Attachments directory. If the file attachment is directly under the CSVs\Transaction\Attachments directory, just specify the *FileName.extension*. If the attachment is under a sub-directory, you must specify *SubDirectory \fileName.exension*.

5 Fill in any other fields to which you want to upload information. Green fields are required and orange fields are required based on other fields.

6 Load, validate, and promote the data as described in Importing data on page 77.

Importing data

After the spreadsheet is complete and is converted to CSV files, you must complete the following steps to import the data. These steps must be performed from the Data Load Console. Detailed instructions for each step are provided in this chapter.

1 Load data from spreadsheets.

2 Validate and promote the data.

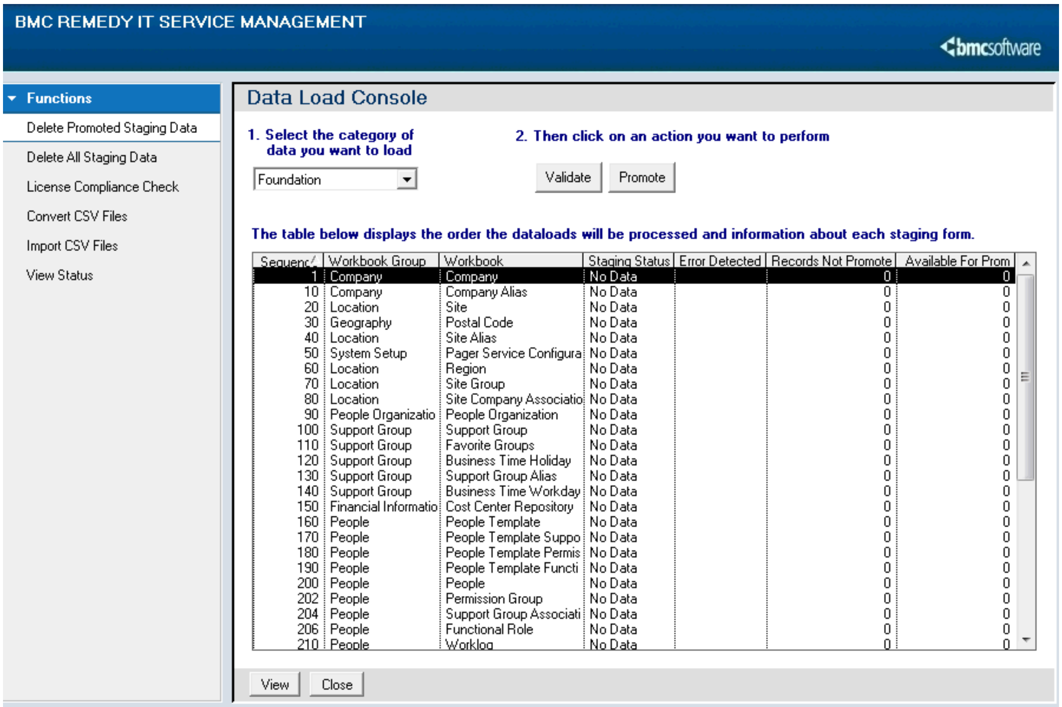
When appropriate, you can delete the data from the staging forms.

Overview of the Data Load Console

This section provides an overview of the Data Load Console. Instructions for using the console are provided in the following sections.

Use the Data Load Console to load data into BMC Remedy ITSM.

Figure 43: Data Load Console



A table lists the staging forms. The default order of these forms in the table corresponds to the sequence in which they are processed.

For each form, the table indicates the staging status, whether errors were detected, the number of records that are not yet promoted, and the number of records that are available for promotion. The table refreshes every 10 minutes. During validation and promotion, you can monitor progress by checking which forms have been validated or promoted.

Loading data from spreadsheets

After you populate the data load spreadsheets, you must load the data into data load staging forms. You must perform this procedure from a computer with the data load spreadsheets installed.

During this procedure, you convert the spreadsheets into CSV files, and then import the CSV files into staging forms.

To load data from spreadsheets

1 Access the Data Load Console.

a. Choose **Start => Programs => BMC Software => AR System => BMC Remedy User**.

b. Using BMC Remedy User, log in to the BMC Remedy AR System server to which you are importing data.

c. From the Application Administration Console, click the Custom Configuration tab.

d. From the Application Setting list, choose **Foundation => Data Management Tool => Data Load Console**.

2. For the category, select from Foundation, Process Setup, or Transactional.

   The table lists all the staging forms for the category. The staging status is No Data for all forms that do not yet have data loaded.

3. Click **Convert CSV Files**.

   The Input Parameters window appears.

4. Enter the parameters, as described in Table 15 on page 79.

Table 15: Input parameters for converting spreadsheets to CSV files

Input parameter	Description
MS Excel Path	The tool uses Microsoft Excel to convert the spreadsheets. You must specify the path to Microsoft Excel on your computer. The default path for Microsoft Excel 2003 is **C:\Program Files \Microsoft Office\OFFICE11**. **Note:** If you browse to the directory on your system, make sure the path points to a directory and not a filename.
Data Management Install Path	The tool must be able to find the spreadsheets and supporting files on your computer. You must specify the path to which the Data Management tool was installed. The default path is **C:\Program Files\BMC Software \DataManagementClient**. **Note:** If you browse to the directory on your system, make sure the path points to a directory and not a filename.

5. To start the conversion, click **Start**.

For each tab in the corresponding data load workbook (such as `Company.xls`), the application creates a CSV file in the ***ITSMDataManagementInstallDir*\7.6\CSVs\Foundation**, **CSVs\ProcessSetup** or **CSVs\Transaction** directory.

Note

If the conversion terminates before completing, you might have a blank cell in the final column. The final column is required in all spreadsheets.

6 Click **Import CSV** Files.

The Import Parameters window appears.

7 Enter the parameters, as described in Table 16 on page 80.

Table 16: Input parameters for importing CSV files

Input parameter	Description
`DataImport.bat` Path	The tool uses BMC Remedy Data Import to import the CSV files. You must specify the path to this executable. The default path is **C:\Program Files\BMC Software\ARSystem\dataimporttool**. **Note:** If you browse to the directory on your system, make sure the path points to a directory and not a filename.
Data Management Install Path	The value that you entered in step 4. **Note:** If you browse to the directory on your system, make sure the path points to a directory and not a filename.
User Password	To run the BMC Remedy Data Import utility, the tool uses the User ID by which you are currently logged in. Enter the corresponding password. **Note:** If you turn logging on, your password is captured in the log. You may want to change your password to something else before importing data with logging turned on, and then change it back after you have finished the dataload process.
External Authentication String	If required by the BMC Remedy AR System server, enter the External authentication.
RPC Number	If required by the BMC Remedy AR System server, enter the RPC number.

8 To import the CSV files, click **Start**.

Data is imported into staging forms.

Note

This import process strips all leading and trailing spaces, and all tab characters from the data.

The import process creates a log file in the ***ITSMDataManagementInstallDir*** **\7.6\Logs** directory for each CSV file that was imported. The name of the import log corresponds to the CSV file that is imported. For example, for `COM-Company.csv`, the import log is `COM-Company.log`. If a CSV file is missing or has no data, an error message is generated in the log file, but the data load utility continues, and loads data for CSV files that do exist and have valid data.

9 Examine the log files for error messages.

Error messages indicated in Table 17 on page 81 are benign and can be ignored.

Table 17: Benign error messages

Error message	Explanation
The Datafile option given does not exist. Cannot import.	The CSV file did not exist. If you did not intend to load data from the corresponding Excel workbook tab, you can ignore this error message.
The Datafile type is not supported. Cannot import.	AR Import generates this error message in response to files with a `CSV` extension. The file is successfully imported, however.

10 If you are using an Oracle database, after loading large amounts of data, run the following SQL command to re-gather Oracle Optimizer Statistics:

```
begin
dbms_stats.gather_schema_stats(
ownname=> '"ARADMIN"' ,
cascade=> TRUE,
estimate_percent=> null,
degree=> null,
no_invalidate=> FALSE,
granularity=> 'AUTO',
method_opt=> 'FOR ALL COLUMNS SIZE AUTO',
options=> 'GATHER');
end;
```

Validating and promoting the data

Data is initially loaded into staging forms. To validate and promote the data, you must use the Data Load Console to perform the following tasks:

1 Validate the imported data.

2 Fix errors.

If there are licensing warnings, you must also fix those warnings.

3 Promote validated data from the staging forms into the appropriate BMC Remedy ITSM forms.

Tip

If you are loading large amounts of data, BMC recommends that you close the Data Load Console after you start validation or promotion. The table refresh affects performance. For example, to check the progress of CTM_Loadpoeple, you can either reopen the Data Load Console or run the following SQL query:

```
select DL_STATUS,count(*) rowcnt from CTM_loadpeople group by
DL_STATUS
```

Validating imported data

Before you can promote the data, you must validate it.

Note

When you proceed with validation, the max filter setting is temporarily changed to 999999999. The max filters setting is increased to allow for the large number of filters required to process large volumes of data.

This setting is changed back to its original value when validation is complete. BMC recommends that you note the current value of max filters before proceeding; if the procedure is halted before it completes, you might need to manually reset this value.

Tip

If you want to run the validation again after all the data is validated without errors, you will get an error message stating that there are no records to be validated. If you make a change on a staging form, however, the data can be revalidated.

This situation might occur if you successfully complete validation, but then records are changed on the system that might affect the data being loaded, such as a company being deleted.

To validate imported data

1 Access the Data Load Console.

a Choose **Start => Programs => BMC Software => AR System => BMC Remedy User**.

b Using BMC Remedy User, log in to the BMC Remedy AR System server to which you are importing data.

c From the Application Administration Console, click the Custom Configuration tab.

d From the Application Setting list, choose **Foundation => Data Management Tool => Data Load Console**.

2 For the category, select from Foundation, Process Setup, or Transactional.

The table lists all the staging forms for the category. Forms with data that you loaded from the spreadsheets are currently listed with a staging status of Unvalidated. A staging status of No Data indicates a form that does not have data loaded from a spreadsheet

3 Click **Validate**.

After you confirm that you want to proceed, validation is performed on all unvalidated data in staging forms. Validated data is revalidated if records are modified on the parent form or if there are unvalidated records on the staging form.

When you proceed with validation, the Data Load Status window appears, listing all forms with records to be validated. As the validation proceeds, the status changes from Pending to In Progress to Complete.

If you close the Data Load Status window, you can open it by clicking **View Status**. When the validation is complete, however, this window closes and cannot be reopened.

After validation is completed for a form, its staging status displayed on the Data Load Console changes to Validated. Validated forms might have errors.

If you validate new people records, the tool validates whether sufficient licenses are available. If the number of licenses available is insufficient, an error message appears, and the data remains unvalidated. To view details of the license compliance check, choose **Functions => License Compliance Check**.

Fixing validation errors

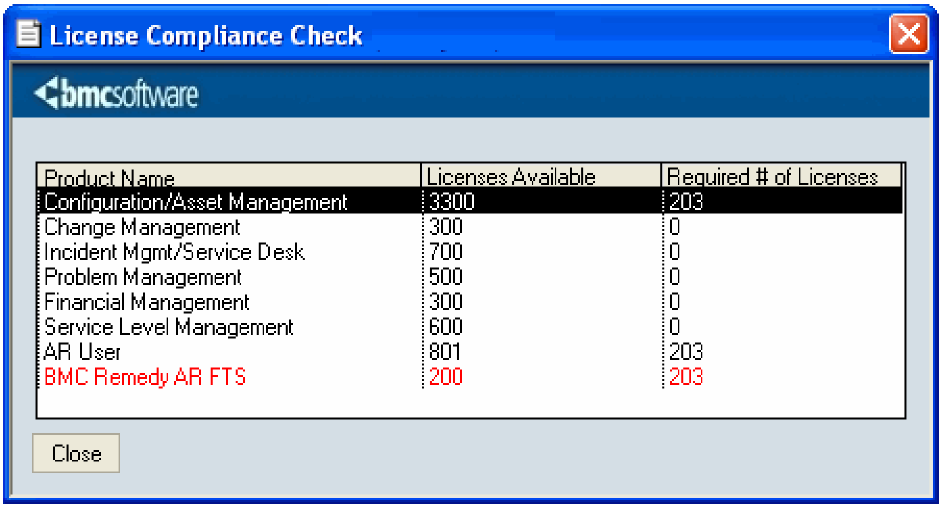
This section describes how to check and fix errors that are specific to validation.

Additional information that is applicable to both validation and promotion is provided in Troubleshooting validation and promotion on page 87.

Checking license compliance

You can load people into the system only if you have sufficient licenses. If you do not have enough licenses, an error message is displayed during validation. To view details of the license compliance check, choose **Functions => License Compliance Check**.

Figure 44: License Compliance Check window



Product Name	Licenses Available	Required # of Licenses
Configuration/Asset Management	3300	203
Change Management	300	0
Incident Mgmt/Service Desk	700	0
Problem Management	500	0
Financial Management	300	0
Service Level Management	600	0
AR User	801	203
BMC Remedy AR FTS	200	203

To fix the license compliance, you must either:

- Add the required licenses.
- Load people only for whom you have sufficient licenses.

Fixing errors on staging forms

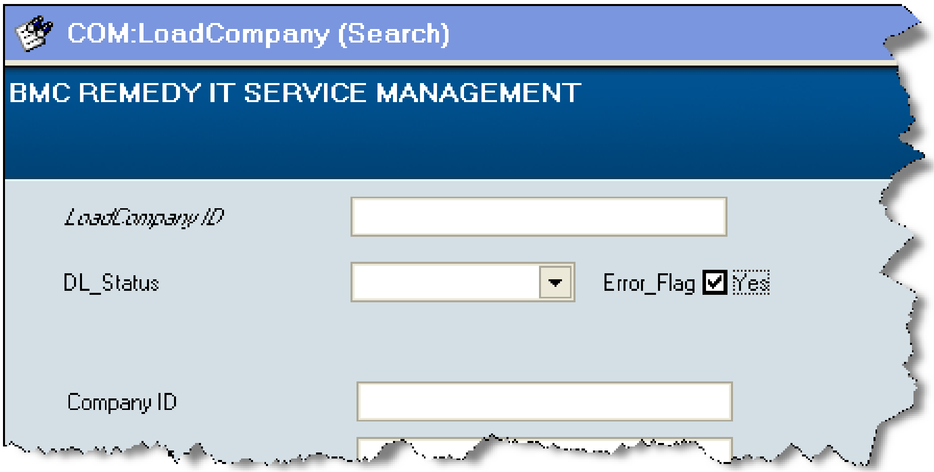
After validation is complete, the Error Detected column indicates whether an error was detected in a staging form.

To fix errors

1 Select the form with errors, and then click **View**.

The staging form opens in Search mode.

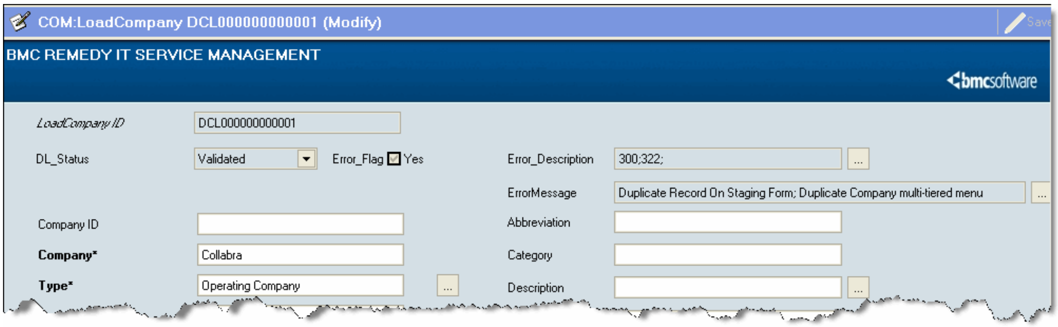
Figure 45: Example of a staging form in Search mode



2 To find records with errors, set Error_Flag to Yes, and then click **Search**.

When you open a record that has an error, the staging form includes one or more error description codes and the corresponding error messages. For example, the record in Figure 46 on page 85 has two errors. For a list of error messages, see Error messages on page 143

Figure 46: A staging form displaying a record with an error



3 Fix the errors.

You can fix errors directly on the form, or you can fix it in the spreadsheet.

The last column in the spreadsheet is required. If you leave a cell blank in the last column, a row might be duplicated or missing in the CSV and corresponding staging form. You must fix this error on the spreadsheet.

Tip

Because an error in a form can result in errors in dependent forms, you can sometimes save time by validating the data after fixing errors in one or two forms.

To fix the error on the form:

Note

Fix errors on the form only when the validation process is complete. If you fix the errors while validation is still running, the validation process might not complete and some records might not be validated.

a Make the correction in the form.

b Save the form.

The staging status for the form is reset to Unvalidated. Error_Flag remains set to Yes until after you validate the data.

To fix the error in the spreadsheet

c Delete the data.

d Fix the spreadsheet.

e Reconvert the spreadsheet to CSV.

f Reimport the CSV files.

4 Click **Validate**.

Validation starts with the first staging form marked as Unvalidated or as Validated but with the error flag set to Yes. It continues with the dependent forms in sequence. If errors are still detected, you can repeat this procedure until all the errors are corrected or you can promote the data that validated without error. For more information on the dependent forms, see Data load staging forms dependencies on page 137.

Promoting validated data into the BMC Remedy ITSM forms

When all the staging forms are validated, only the records that are validated without errors will be promoted.

Note

If a record is modified on a staging form that has dependent staging forms with records, those dependent staging forms will need to be re-validated prior to promotion.

To promote validated data

1 Click **Promote**.

Note

When you proceed with promotion, the max filter setting is temporarily changed to 999999999. It is changed back to its original value when promotion is complete.

2 Confirm that you want to proceed.

When you proceed, the Data Load Status window appears, listing all forms to be promoted. As the promotion proceeds, the status changes from Pending to In Progress to Complete.

If you close the Data Load Status window, you can open it by clicking **View Status**. When the promotion is complete, however, this window closes and cannot be reopened.

After data is promoted from a staging form into the BMC Remedy ITSM form, the staging status displayed on the Data Load Console changes to All Data Promoted and the number of records to promote is reset to 0.

3 If you are using an Oracle database, after promoting large amounts of data, run the following SQL command to regather Oracle Optimizer Statistics:

```
begin
dbms_stats.gather_schema_stats(
ownname=> '"ARADMIN"' ,
cascade=> TRUE,
estimate_percent=> null,
degree=> null,
no_invalidate=> FALSE,
granularity=> 'AUTO',
method_opt=> 'FOR ALL COLUMNS SIZE AUTO',
options=> 'GATHER');
end;
```

Troubleshooting validation and promotion

To troubleshoot possible errors in validation and promotion, you can perform tasks described in the following sections:

- Monitoring the thread manager for a halted validation or promotion on page 88
- Recovering from a halted validation or promotion on page 88
- Checking for errors in validation and promotion on page 89

Monitoring the thread manager for a halted validation or promotion

When you start a validation or promotion, records are added to the DLD:ThreadManager form. At the end of the process, the records are removed.

You can search for records in the DLD:ThreadManager form. If the records are not being added, modified, or removed, the process has halted. Follow the instructions in Recovering from a halted validation or promotion on page 88.

Note

If you restart the BMC Remedy AR System server before recovering from a halted validation, you see the following error message:

```
Another validate of Promote process is running ... - AL -
DLD:DLC:FoundationValidate_102_ValidateOnly.
```

Recovering from a halted validation or promotion

If either validation or promotion is halted before the operation is complete, an administrator must:

- Reset the maximum number of filters for an operation to the original value.
- Delete the DLD:ThreadManager records.
- If you encounter the following error, check the Short Description field in the forms that have the error flag set:

  ```
  An error was encountered during data promotion. The Short
  Description field of this record has been updated with the error
  details.
  ```

- Check for other errors as described in Checking for errors in validation and promotion on page 89.

To recover from a halted validation or promotion

1 Reset the maximum number of filters for an operation to the original value.

   a Choose **Start => Programs => BMC Software => AR System => BMC Remedy User**.

   b Using BMC Remedy User, log in to the BMC Remedy AR System server to which you are importing data.

   c Open the AR System Administration Console.

d Choose **System => General => Server Information**.

The Server Information window appears.

e Click the Advanced tab.

f Change the value in the Maximum Filters for an Operation field to the original value, and then click **OK**.

BMC Remedy AR System is installed with this value set to 200000.

2 Delete the DLD:ThreadManager records.

a Open DLD:ThreadManager.

b Search for all records.

To do this, put % in the RequestID field and click **Search**.

c Select all the records.

d Choose **Actions => Delete**.

A message asks you to confirm whether to delete the records.

e Click **OK**.

You can now rerun validation or promotion.

3 To check the Short Description field in the forms that have the error flag set:

a In BMC Remedy User, search for forms with the error flag set to Yes.

b Check the Short Description field for text that explains the error.

c Fix the error.

d Continue with the validation process.

Checking for errors in validation and promotion

Check for errors in validation and promotion in the following places:

- **The Data Load Console**-Errors found on staging forms are flagged. For details about fixing errors, see Fixing errors on staging forms on page 84.
- **ARerror.log**-This log file lists errors in running validation and promotion.

- **CAI Events form**-Search for records with Return Code set to Error. The comments in Return Message indicate which error occurred.

Deleting data

You can delete data from staging forms except when validation or promotion is running.

The navigation pane on the left of the Data Load Console provides two functions:

- **Delete Promoted Staging Data** — Deletes only promoted data from all staging forms.
- **Delete All Staging Data** — Deletes all data from all staging forms, regardless of the current status.

You can delete individual records from staging forms, using the same method that lets you delete individual records in any BMC Remedy AR System form. If you delete any records from a staging form that has been validated, you must rerun the validation before you promote data.

Note

If you delete all records from a validated staging form, the other forms are listed as validated on the Data Load Console. You must rerun validation, however, to make sure that other records on other forms are not dependent on the deleted records. If you do not rerun validation, you might receive an error message during promotion.

Chapter 4

Using the data wizard to modify data

You can use the data wizard to modify foundation data throughout all applicable BMC Remedy ITSM forms and in configuration item (CI) records in BMC Atrium CMDB.

Note

Only a user with AR System Administrator permission can use the data wizard.

Overview of the data wizard

Some data, such as company name and site name, cannot be modified on the foundation configuration forms, because this data is used in records throughout the BMC Remedy ITSM applications and in BMC Atrium CMDB. For example, the site name is created on the SIT:Site form, but it can also be used on records on the CTM:People form, HPD:Help Desk form, and on CIs in BMC Atrium CMDB.

You can use the data wizard to modify this data, as it modifies the data in all applicable BMC Remedy ITSM forms and, where appropriate, in CI records in BMC Atrium CMDB.

Table 18 on page 92 indicates where the data wizard modifies data.

Table 18: Which records are affected by the data wizard

Records modified by data wizard	Records *not* modified by data wizard
■ BMC Remedy ITSM—all forms, except where noted in Exclusions from the data wizard on page 191 ■ BMC Atrium CMDB—CI records in the BMC Asset dataset	■ Other datasets in BMC Atrium, such as the sandbox dataset of the BMC Topology Discovery dataset ■ Local databases for discovery products that are stored outside BMC Atrium CMDB ■ BMC Service Level Management records ■ BMC Service Request Management records ■ BMC Remedy Knowledge Management records

Note

You can use the data wizard to modify or count only data that has a status of Enabled.

If you have records that are not modified by the data wizard, you must modify them in the relevant application. For more information about modifying data from other applications, see Modifying foundation data in related applications on page 239.

Counting records that use the target value in specified fields

Before you modify data, you can use the data wizard to count records that use the target value. For example, if you plan to change a site name from "Canada" to "Canadian HQ," the data wizard can tell you:

- All forms that reference the Site Name field
- How many records on each form contain the target value ("Canada" in the example)

You can use this information for planning the change.

To count records that use the target value in specified fields

1 Access the data wizard.

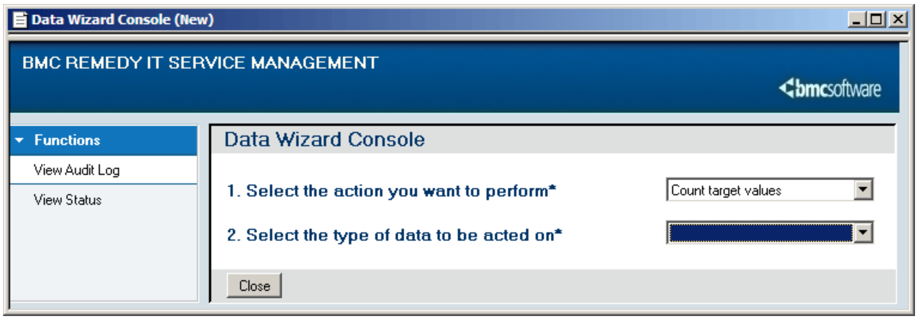
   a Log in to the BMC Remedy AR System server as an administrator.

b From the Application Administration Console, click the Custom Configuration tab.

c From the Application Setting list, expand Foundation, expand Data Management Tool, and then double-click Data Wizard Console.

The Data Wizard Console is displayed as shown in Figure 47 on page 93.

Figure 47: Data Wizard Console



2 Select the Count target values action.

3 Select the data that you are counting.

You can select any of the following types of data:

- Company Name
- Person Name
- Login ID
- Generic Categorization
- Operational Categorization
- Product Categorization
- Product Model / Version
- Site Name
- Site Information
- Support Group

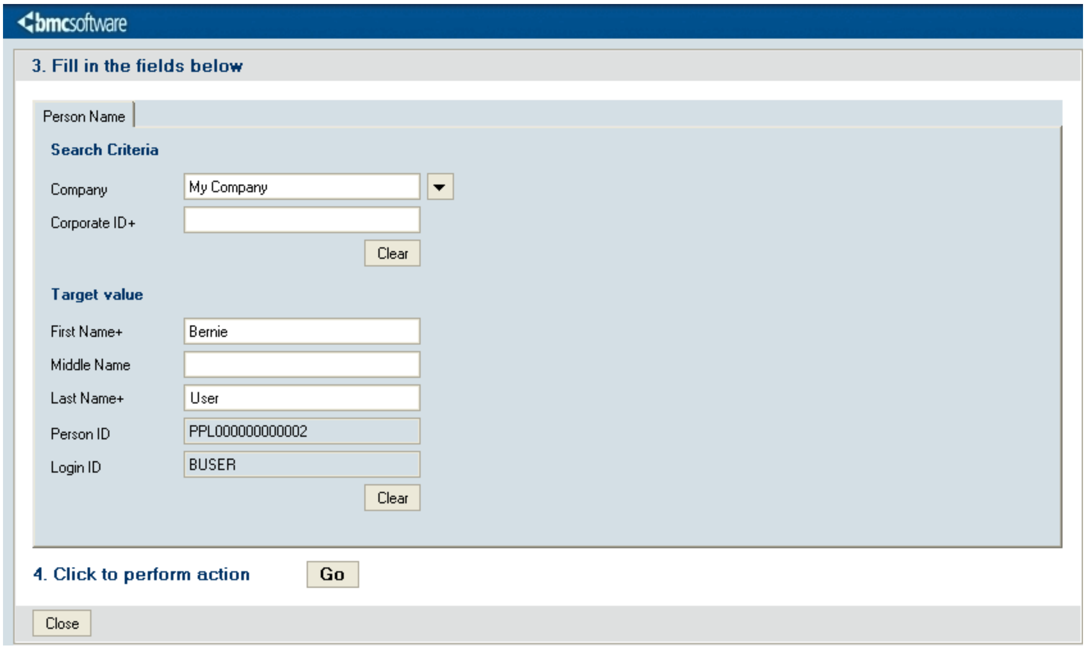
When you select the type of data, a window appears, prompting you for the target value.

4 Enter or select the target value.

For some types of data, you might specify values for multiple fields. For example, for Product Categorization, you can specify multiple tiers of categorization.

For some types of data, you can specify search criteria to locate the appropriate original value. For example, for Person Name, you can specify the Company Name.

Figure 48: Example of the Data Wizard Console ready to count records for a person name



5 Click **Go**.

You are prompted to confirm whether to proceed.

When you proceed, the Data Wizard Status window appears, listing forms to be counted. As the count proceeds, the status changes from Pending to Complete.

If you close the Data Wizard Status window, you can open it by clicking **View Status**. When the count is complete, however, you cannot open this window.

Viewing the audit log

The audit log displays all the forms that were checked for records to update.

To To view the audit log

1 Click **View Audit Log**.

2 Select the appropriate Count record.

   You can also see the results of previous counts.

   The Data Administration Action Results tab displays the results of the count in a table. The table lists all forms that reference the data administration type, and the number of records for each form that include the target value.

Prerequisites to updating target values

To maintain data integrity you must perform certain prerequisite actions before you use the data wizard to update target values. This section describes details of these actions.

WARNING

You must perform all actions that apply to your environment. Failure to do so can compromise data integrity.

To prevent loss of data or to aid in reverting your data back to its original state before using the data wizard, you should back up your database before beginning.

Note

Data wizard updates should be run at times when the systems are unavailable for general use, such as a scheduled change windows.

Table 19: Prerequisite actions to maintain data integrity

Area	Actions to perform
Escalations	Disable escalations by performing the following steps: 1 Open the AR System Administration Console. 2 Choose **System => General => Server Information**. 3 Select Disable escalations. 4 Click **OK**. 5 Close BMC Remedy User, and then restart the BMC Remedy AR System server. **Note:** For the server group environment, if the Disable escalations option is not available, use BMC Remedy Developer Studio to manually disable escalation objects on the primary server.
Reconciliation Engine	Make sure that reconciliation does not run by performing the following steps: 1 Open the BMC Atrium CMDB Console. 2 Click the Reconciliation Manager tab. 3 In the Job History area, look for active jobs. If a reconciliation job is currently running, you *must* wait for it to complete before you run the data wizard. 1 If no jobs are active, inactivate currently scheduled jobs. 2 Check again for active jobs, to make sure that none were started.
Discovery products	If you have discovery products that populate BMC Atrium CMDB, such as BMC Topology Discovery or BMC Configuration Discovery, you must perform the following steps: 1 Stop the discovery products from populating BMC Atrium CMDB. 2 Update the company or other foundation data being changed in the discovery products as applicable. **Note:** The data wizard updates the discovery data sets in BMC Atrium CMDB. **Note:** If you are updating product categorization, see the example in the following section Coordinating the update of product categorization with BMC discovery products on page 97

Area	Actions to perform
Distributed Server Option (DSO)	DSO keeps databases synchronized between two separate BMC Remedy AR System servers. Updates performed by the data wizard do not trigger DSO. Also, you must not allow DSO events to update the database while the data wizard is performing an update. If you are using DSO, you must perform the following steps: 1 Turn off DSO on both servers. 2 Run the same data wizard updates on both servers. If you do not run exactly the same updates on both servers, the databases are no longer be synchronized, which results in failed DSO events. 1 Turn DSO back on.

Coordinating the update of product categorization with BMC discovery products

This section provides an example of coordinating updates to product categorization with BMC discovery products.

You can perform this procedure if you have upgraded from BMC Topology Discovery version 1.4 to version 1.5 and want to change from default categorization to best practice categorization. You can modify this procedure for other updates to product categorization or for BMC Foundation Discovery or BMC Configuration Discovery.

To coordinate the update of product categorization with BMC discovery products

1 Stop the discovery server.

2 Modify the categorization XML file.

If you are changing from default categorization to best practice categorization on BMC Topology Discovery, perform the following steps.

a Browse to ***TDHome*\public_html\visualis\filter\normalization\default**, where ***TDHome*** is the location where the BMC Topology Discovery server is installed.

b Rename `defaultcategorizationrules.xml` to `defaultcategorizationrules.xml.old`.

c Rename `bestpraticescategorizationrules.xml` to `defaultcategorizationrules.xml`.

3 Use the data wizard to update the product categorization in the product catalog, in CIs stored in BMC Atrium CMDB, and in BMC Remedy ITSM records, as described in Updating target values on page 98.

4 Restart the discovery server.

Updating target values

You can use the data wizard to modify:

- Company Name
- Person Name
- Login ID
- Generic Categorization
- Operational Categorization
- Product Categorization
- Product Model / Version
- Site Name
- Site Information
- Support Group

The data wizard updates the specified target value in the appropriate foundation configuration form and changes the specified target value in other BMC Remedy ITSM application forms and, where applicable, on CI forms in BMC Atrium CMDB. For example, if you change a product categorization value, this value is changed in the product catalog, on BMC Remedy ITSM application forms that include product categorization, and for all applicable CIs.

The data wizard updates historical records, such as closed incident and problem records. It does not, however, update audits on the form.

When you update records with the data wizard, the Last Modified By and Last Modified Date fields are set for auditing purposes. For more information about how the Login ID is updated, see Updating Login ID on page 99.

Limitations

The data wizard updates records only if the status of the parent record is set to Enabled. For example, you cannot update a company if the company is set to Offline on the Company form.

The data wizard does not update the following areas:

- Any character fields that contain the target value concatenated with other text. For example, if you are updating the Company Name from "My Company" to "Calbro," instances of "My Company" in Work Info fields and Summary fields would not be updated. Only instances of "My Company" in the Company Name field would be updated.
- Qualifications on the Report Console or notification messages.
- Additionally, you cannot use the data wizard to change your own Login ID.

Oracle database limitation

When the data wizard is used for an Oracle database, it cannot update data that has leading or trailing spaces.

Limitations of auditing

The audit log file is not updated when you run the data wizard. The only information available on a form to track what changes the data wizard has made is the name captured in the Last Modified By field and the date captured in the Last Modified Date field of a form. However, if a form is further updated after it has been modified by the data wizard, the record of who ran the data wizard on the particular form is lost.

Updating Login ID

The Submitter field on BMC Remedy ITSM application forms and on CI forms is populated with the applicable Login ID value. When you change a Login ID, the Submitter field is updated on all applicable BMC Remedy ITSM application forms.

If the Last Modified By field is the target value, the data wizard does not set the field to the new value. When the data wizard makes updates, it sets the Last Modified By field to the Login ID of the person making the update.

Updating categorization

The product catalog, operational catalog, and generic catalog include multiple levels of categorization. Catalog entries can be defined to multiple levels of categorization.

Table 20 on page 100 define to levels of categorization.

Table 20: Examples of product catalog entries

Categorization level	Example 1	Example 2	Example 3
Tier 1	Hardware	Hardware	Hardware
Tier 2	Machine	Machine	Machine
Tier 3	Server	Server	
Manufacturer	Hewlett Packard		
Product Name	Proliant		

The following three scenarios illustrate how the levels of categorization that are present in your catalog and the levels of categorization that you specify in the data wizard affect which categorization records are updated:

- Scenario 1—All three examples are present in your product catalog, and you want to change "Machine" to "Processing Unit." You could specify only the first two tiers to be updated. The remaining categorization levels are updated throughout the catalog.
- Scenario 2—All three examples are present in your product catalog, and you specify three tiers to be updated (for example, you change Hardware - Machine - Server to Hardware - Processing Unit - Server). Example 1 and Example 2 are both updated, but Example 3 is not updated.
- Scenario 3—Example 3 is not part of the product catalog, and you specify three tiers to be updated. Any forms *outside* the product catalog with only two tiers specified (for example, an incident with product categorization of Hardware - Machine) are updated, however, to keep categorization consistent. These additional forms that are updated are not included in the count. As a result, if you compare the audit for the count and the update, you might notice a discrepancy.

Updates to the product catalog, operational catalog, and generic catalog work the same way.

The data wizard has a limitation on updating categorization. For example, the product catalog could have two entries with the first entry containing the following tiers:

- Tier 1—Hardware

- Tier 2—Processing Unit
- Tier 3—Desktop

The second entry could contain the following tiers:

- Tier 1—Discovered
- Tier 2—Machine
- Tier 3—Server

If you specify in the data wizard to change Tier 1—Discovered to Tier 1—Hardware and to change Tier 2—Machine to Tier 2—Processing Unit, the update is not allowed because Tier 1 and Tier 2 already exist as Tier 1—Hardware and Tier 2—Processing Unit. Instead, you would specify additional tiers when you update categorization. In this example, you would also specify to change Tier 3—Server to Tier 3 —Server. Although the value remains the same for Tier 3, because the values change for Tier 1 and Tier 2, the updated product catalog entry is not the same as the original product catalog entry.

Note

Before you run the data wizard, you must follow the instructions in Prerequisites to updating target values on page 95.

Updating target values

To update target values

1 Access the data wizard.

   a Log in to the BMC Remedy AR System server as an administrator.

   b From the Application Administration Console, click the Custom Configuration tab.

   c From the Application Setting list, choose **Foundation => Data Management Tool => Data Wizard Console**.

2 Select the Update target values action.

3 Select the data that you are modifying.

   When you select the type of data, a window appears, prompting you for the target value and the new value.

4 Enter or select the target value.

For some types of data, you might specify values for multiple fields. For example, for Product Categorization, you can specify multiple tiers of categorization.

For some types of data, you can specify search criteria to locate the appropriate target value. For example, for Site Name, you can specify the Company and, optionally, Region or Site Group.

To select a person, you must press ENTER in the first name or last name field.

The search criteria are mandatory for Generic Categorization, Product Model/ Version, Site Information, and Support Group, because they are required to select the correct records to update. For example, the same support group name might be used for both My Company and Calbro, but you are changing the support group for My Company.

5 Specify the new value.

You can click **Copy** to copy the target value and then make the appropriate changes, or you can type the new value.

You must specify a new value for each target value. For example, if you are updating the support group name but keeping the support organization, you would copy the support organization and enter a new support group name.

Note

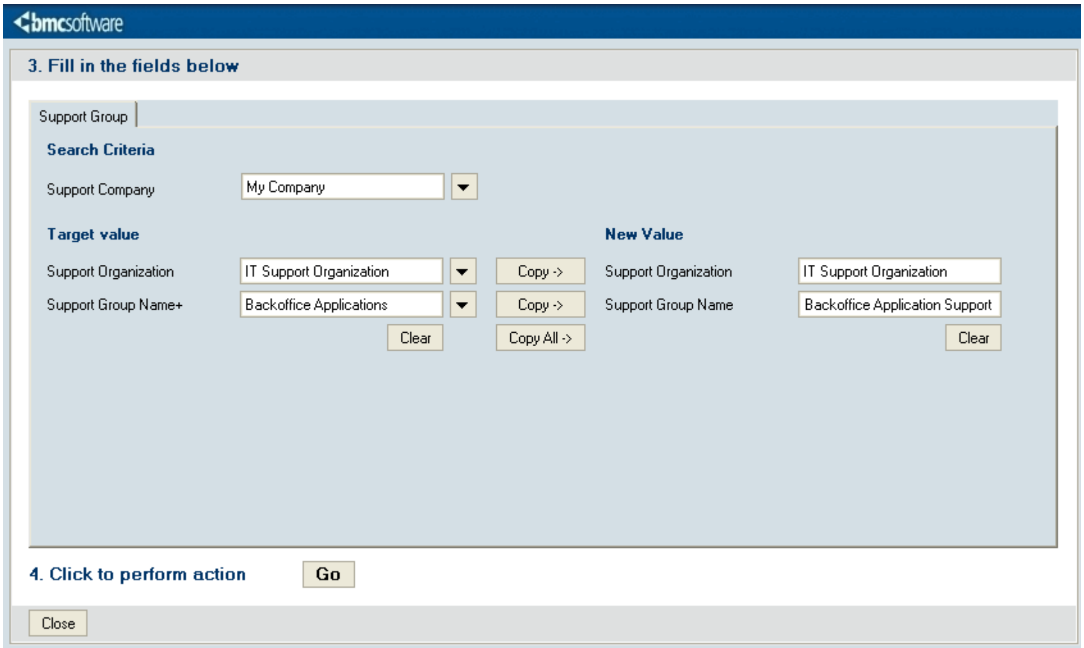
The new value cannot duplicate a value that is already in the system.

Tip

To copy all fields at the same time, click **Copy All**.

Figure 49 on page 103 shows the Data Wizard Console fields populated to update a support group.

Figure 49: Example of the Data Wizard Console ready to update a support group



6 Click **Go**.

You are prompted to confirm whether to proceed.

When you proceed, the Data Wizard Status window appears, listing forms to be updated. As the update is processed, the status changes from Pending to Complete.

If you close the Data Wizard Status window, you can open it by clicking **View Status**. When the update is complete, however, this window cannot be reopened.

Note

After you complete the updates, you must follow the instructions in Post-update requirements on page 104.

Viewing the audit log

The audit log displays all the forms that were checked for records to update. The listed forms include the field being updated, although some forms might not include records that contain the target value.

To view the audit log

1 Click **View Audit Log**.

2 Select the appropriate Update record.

   The Data Administration Action Results tab displays the results of the update in a table. The table lists all forms that reference the data administration type.

   For some forms, the table also lists the number of records that were updated. This information is listed for all of the forms. This information is also included for the following forms and the main child forms: Helpdesk (incident), Helpdesk Assignment Log, Impacted Areas, Change, CIs, Problem, Known Error, and Solution.

Post-update requirements

To maintain data integrity, you must perform certain actions after updating target values. This section provides describes the actions required to be performed.

WARNING

You must perform all actions that apply to your environment. Failure to do so can compromise data integrity.

Table 21: Actions to perform after updating target values

Area	Actions to perform
Escalations	Re-enable escalations by performing the following steps: 1 Open the AR System Administration Console. 2 Choose **System => General => Server Information**. 3 Clear Disable escalations. 4 Click **OK**. 5 Close BMC Remedy User, and then restart the BMC Remedy AR System server. **Note:** For the server group environment, if the escalation objects on the primary server are disabled manually using BMC Remedy Developer Studio because the Disable escalations option is not available, use BMC Remedy Developer Studio to manually re-enable the escalation objects on the primary server.

Area	Actions to perform
Reconciliation Engine	Reactivate the reconciliation jobs by performing the following steps: 1 Open the BMC Atrium CMDB Console. 2 Click the Reconciliation Manger tab. 3 In the Job History area, activate currently inactive jobs.
Discovery products	If you have discovery products that populate BMC Atrium CMDB, such as BMC Topology Discovery or BMC Configuration Discovery, you must perform the following steps: 1 Update the company or other foundation data being changed in the discovery products as applicable, if you have not already done so. 2 Restart the discovery product that populates BMC Atrium CMDB.
Distributed Server Option (DSO)	**Note:** You must turn off DSO before running the data wizard, as described in Prerequisites to updating target values on page 95. 1 Run the same data wizard updates on the other servers, if you have not already done so. 2 Turn DSO back on.
Server groups and other environments with two application servers sharing a database	After you run the update on one server, you must restart BMC Remedy AR System services on the other application server or server groups.

Troubleshooting data wizard counts and updates

To troubleshoot possible errors during counts and updates, you can perform the following activities:

- The amount of time for a count or update to take depends on the total number of records being checked and on the number of affected records. For example times, see Performance benchmarks for modifying records with the data wizard on page 21.
- Rerunning the count or update on page 106

Monitoring the data wizard for a halted count or update

Monitor the Data Wizard Status window. If an item in the Status Window is stuck at Pending, and does not change to Complete, an error might have occurred during the update.

Note

If the count or update is halted or interrupted, follow the procedure described in "Rerunning the count or update" on page 106 to rerun the data wizard action.

The amount of time for a count or update to take depends on the total number of records being checked and on the number of affected records. For example times, see "Performance benchmarks for modifying records with the data wizard" on page 21.

To check for errors

1 Check for errors in the following places:

- DLD:Lock form - Search for a record with FormName01 = DLD:SYS:DataWizAction. If there is such record, it indicates either the process is still running, or a processing error is preventing this record from being deleted after the process has completed.
- CAI Events form — Search for records with App Interface Form = DLD:SYS:DataWizAction. The comments in the Return Message field indicate which error occurred.
- Filter log — Run the filter log to check for any errors.

Rerunning the count or update

If the count or update is halted or interrupted, you can rerun the data wizard action; the count or update is completed on the remaining forms.

To rerun the count or update

1 Clear the lock that indicates the data wizard is running.

   a Open the DLD:Lock form.

   b Search for a record where the Form Name01 field is set to `DLD:SYS:DataWizAction`.

   c Delete the record.

2 Rerun the count or update.

   a On the Data Wizard Console, click **View Audit Log**.

   b Open the audit of the action that was halted or interrupted.

   c Click **Re-Run**.

   The count or update resumes running from where it was halted or interrupted.

   Note

   You can perform a new count instead of rerunning a count. For an update, however, you must perform a rerun.

Chapter 5

Managing customizations

The Data Management tool is designed to load data into and to modify data in an out-of-the-box BMC Remedy ITSM 7.6.0x product suite. The BMC Remedy ITSM 7.6.0x product suite includes significant enhancements to the functionality of the applications and the types of data being stored from the previous version. Despite these capabilities, you might have customized BMC Remedy ITSM, because of various business drivers.

To make sure that the Data Management tool functions correctly in a customized BMC Remedy ITSM application, you must identify the customizations, analyze the impact, and make the customizations work with the tool.

Identifying customizations

Use these tips to identify your customizations:

- **Documentation** — If your customizations are documented, you can use this information to create a list of the workflow, fields, and forms that have been added or changed within your application.

- **Naming conventions** — Application developers sometimes use a naming convention that identifies customized workflow. The workflow is then placed within a namespace reserved for this purpose. For example, if the HPD:HPD-GetPerson active link is modified, it could have been copied to HPD:CUS-GetPerson, using CUS in the name to indicate that it is customized workflow.

Analyzing your customizations for impact on data load functionality

After you identify customizations, you must determine their impact on the data load functionality. The types of customizations to BMC Remedy ITSM that can impact the functionality of the Data Management tool are as follows:

- **Custom fields with Required entry mode** — Whether these fields are new or are modified on existing BMC Remedy ITSM forms, they impact the data load. You must make sure that these fields are populated with data. Otherwise, the data load fails.

- **Fields with Optional entry mode** — If these fields have custom workflow to enforce data entry when records are created or updated, they impact the data load. If required, duplicate the custom workflow on the data load staging forms to enforce the same constraints. To determine the appropriate staging form, see How tabs map from spreadsheet to target form on page 221

- **Custom workflow** — In most cases, workflow customizations do not impact the Data Management tool. When data is loaded by the tool, all BMC Remedy ITSM workflow on forms targeted for the load are bypassed, with the exception of workflow firing from the tool itself.

  This workflow bypass on target forms is performed by using filter workflow with goto actions. These filters fire on execution order 0 based on keywords that are received from the data load staging forms.

  Some custom workflow, however, does impact the data load function. For example, the workflow might be triggered on creation of the record on the form to create other child or dependent records elsewhere.

- **New customized forms** — In most cases, new forms do not impact the data load function. If dependencies are created between a new customized form and data load target forms, however, you must perform additional evaluation.

Making data load work with your customizations

This section contains some detailed steps on how to incorporate your customizations into the Data Management tool.

The following topics are provided:

- Understanding the staging forms on page 110

- Adding custom fields on page 113

Understanding the staging forms

This section describes how the workflow in the data load staging forms is structured. Use this information for customizations of the Data Management tool.

The following topics are provided:

- Staging form filters on page 111
- Staging form permissions on page 112
- Staging form fields on page 112

Staging form filters

You can customize two types of filters. Both types of filters run on modify and only on records that have not been promoted:

Filters that run on validation

The filters that perform the validations are coded in the 200–299 execution order range. For fields that must be set for use in validation, the filters with those actions are coded in this range. Validation filters look at the keyword VALIDATE.

Filters that run on promote

The calculation filters that set the fields needed for promotion, and the filters that perform the actual promotion (push to target forms) are coded in the 700–798 execution order range. Promotion filters look at keyword LOAD.

Table 2 on page 18 lists the execution order and filter actions for the staging forms.

Note

Make customizations only in the 200–299 and the 700–798 execution order range.

Table 22: Execution order and filter actions

Execution order	Filter actions
0	Skip to execution order 1001
10 - 13	Related to error handling
200 - 299	Validation
300	Set data load status to Validated
500	If any field data is changed, set data load status to Unvalidated
700 - 798	Calculation, promotion
799	Set data load status to Promoted
900	Delete record

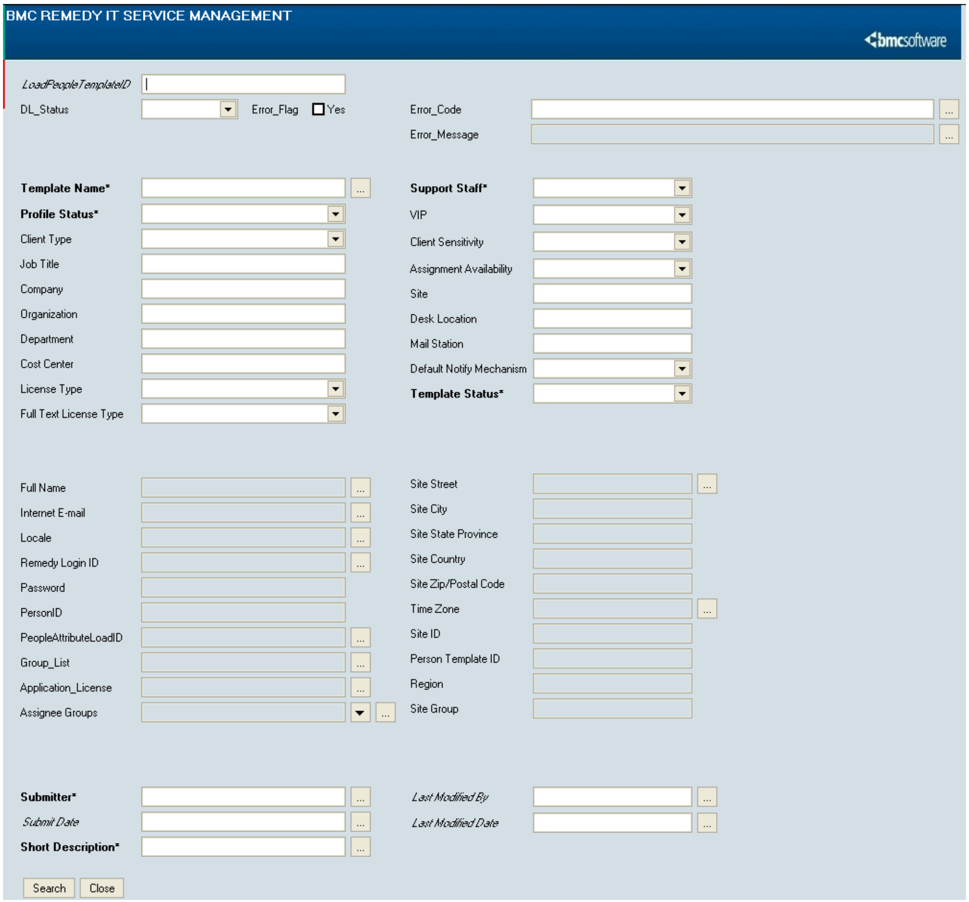
Staging form permissions

Staging forms have Public-Hidden permission. All fields on staging forms have Public-Write permission.

Staging form fields

Fields on staging forms are grouped in different sections, as indicated in the following figure.

Figure 50: Example of a staging form



The first section of the staging form contains fields that provide information about the processing of the staging form. They include fields for ID, data load status, error flag, error code, and error message. These fields are not promoted to the target form.

The second section of the staging form contains fields that contain the data being imported. These fields correspond to the columns of data entered on the staging form. These fields are promoted to the target form.

The third section of the staging form contains fields that are calculated from data in the second section These fields are read-only; the values are entered only through filter calculations. These fields are promoted to the target form.

The fourth section of the staging form contains system fields.

Note

Hidden fields, which are not in the view, are used for temporary calculation by workflow.

Adding custom fields

The following scenario demonstrates the steps to take when a new field is added to a target form and how to incorporate the field into the Data Management tool.

Tip

To determine the staging form equivalent of the target form into which you are loading data, see How tabs map from spreadsheet to target form on page 221.

In this scenario, a new required character field called Employee ID, with field ID 536871147, has been created in the CTM:People form. The requirement is to incorporate this new field into the Data Management tool so that the contents of this field can be loaded at the same time as the other out-of-the-box fields.

Note

Filters for this staging form use the Matching IDs feature. Some forms require an additional step, as described in Modifying workflow to promote custom fields on page 114.

To add the customization

1 Add a new column called Employee ID in the 02 CTM-People tab of the `People.xls` spreadsheet.

   WARNING

   The last column on every spreadsheet must be a mandatory field (green), so the new column must be added somewhere before the last column.

   This spreadsheet is installed with the Data Management tool. You can use this column to populate and load the contents of the custom field at the same time as the other People records.

2 Update the `CTM-People.arm` file.

   This file is located in the ***ITSMDataManagementInstallDir*\7.6*Mappings*** directory. Update the file by adding the following line: `Mapping: $536871147$="Employee ID"`

This mapping is required for importing the modified spreadsheet into the staging form.

3 Re-create an exact copy of this field in the CTM:LoadPeople staging form.

The field must exist on the staging form, so that it can accept the new customized field.

After this step, you can load new People records that contain the customized Employee ID column. For some forms, however, you must first modify the filter on the staging form before you can promote the data. For more information, see Modifying workflow to promote custom fields on page 114.

Modifying workflow to promote custom fields

For most forms, you do not need to modify the workflow for the promotion of data from the staging form to the target form. In the Employee ID example, the filters use the Matching IDs feature, so no modification is needed. For some forms, however, you must modify the workflow.

If you add fields to a form that does not use this feature, such as the FIN:LoadCostCenterUDAAssoc form, you must:

1 Copy the new fields from the target form to the staging form.

2 In the Push Field action, select the new fields in the Field and Value fields.

The staging versions of these target forms do *not* use the Matching IDs feature, and require the workflow modification for custom fields:

- FIN:CostCenterUDAAssoc
- Business Time Holidays
- Business Time Workdays
- COM:Company Alias
- All people attributes forms:
  - CTM:People IT Skills
  - CTM:Login ID
  - CTM:People Benefit Info
  - CTM:People Education
  - CTM:People HR Attendance Mgmt

  - CTM:People HR Time Management
  - CTM:People Travel Profile
  - CTM:People Wallet
- CTM:People Worklog
- NTE:CFG-Notification Events
- PBM:Problem Investigation
- PBM:Solution DB Alias

Modifying workflow to promote custom fields

To modify workflow to promote custom fields

1. Copy the new field from the target form to the staging form.
2. View the filters on the staging form.
3. Open the filter that pushes to the target form.

   This filter is in the 700–799 range. For example, on the FIN:LoadCostCenterUDAAssoc form, the filter is called FIN:DCU:CreatCostCenterUDA_750_FIN‘!

4. On the If Action tab, in the fields area, choose the Name and choose **Value => Field**.

   The Name indicates the field name on the target form. Choose **Value => Field** to select the field name on the staging form. These two fields might be the same field name.

5. Save your changes.

Making the data wizard work with your customizations

If you have new forms or if you have added foundation data fields to BMC Remedy ITSM forms, you can modify the data wizard to work with these customizations.

The following topics are provided:

- Data wizard architecture overview on page 116 on Data wizard architecture overview on page 116
- Modifying the data wizard to work with new forms on page 118
- Modifying the data wizard to work with new fields on BMC Remedy ITSM forms on page 123

Data wizard architecture overview

This section provides a high-level overview of the data wizard architecture. You modify two forms to make the data wizard work with your customizations: DLD:SYS:DataWizardProductStatus and DLD:SYS:Data WizAction. The numbers indicate the sequence of steps that occur when you perform a count or modify from the Data Wizard Console.

Figure 51: High-level architecture overview

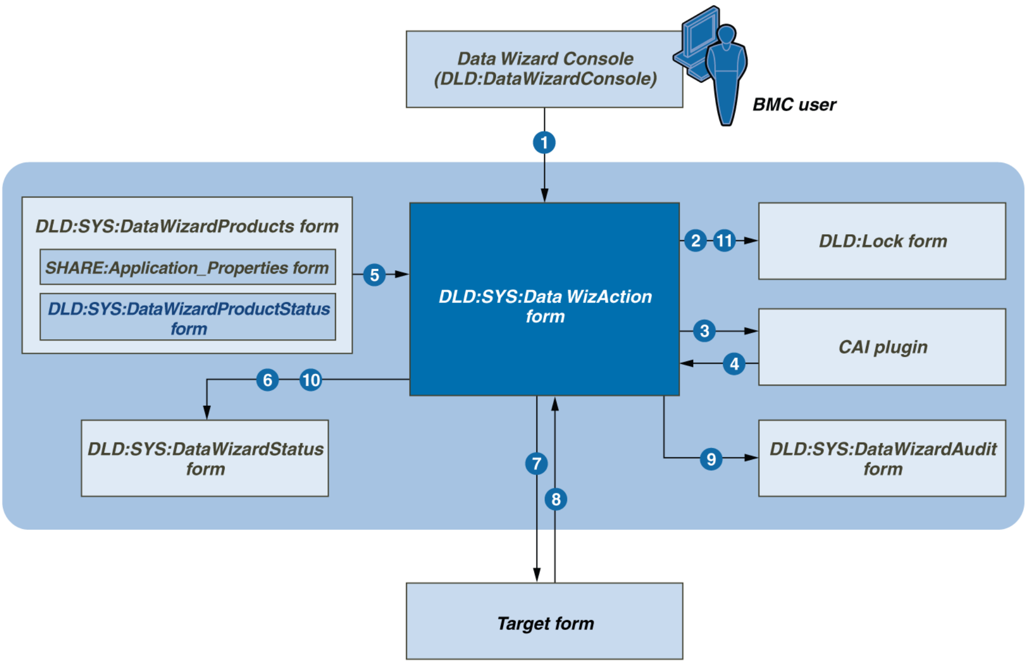


Table 23 on page 116 describes the forms and plugins included or touched by the data wizard.

Table 23: Forms and plugins included or touched by the data wizard

Form or plugin	Customize?	Description
Data Wizard Console (DLD:DataWizardConsole form)	No	Console from which the user runs the data wizard.

Form or plugin	Customize?	Description
DLD:SYS:DataWizAction form	Yes	The core of the data wizard. All filters containing count or update SQL statements reside on this form. These filters run in different guides, based on the action and type of data. These SQL statements look at T tables and C columns.
DLD:SYS:DataWizardProducts form	Yes, but only if adding new forms to be updated by the data wizard	A join of data in the SHARE:Application_Properties form and the DLD:SYS:DataWizardProductStatus form. To make the data wizard work with new forms you add data to the DLD:SYS:DataWizardProductStatus form. The DLD:SYS:DataWizardProductStatus form contains the data displayed in the Status window when an action runs. Each record contains the application ID, data administration type, and target object. The target object is the form name displayed by the Status window. On this form, do not delete any record installed with the data wizard.
DLD:SYS:DataWizardAudit form	No	Contains a record of each count or update of each form for audit
DLD:SYS:DataWizardStatus form	No	Updates the Status window to indicate whether a count or update is in progress or complete.
Target form	Not applicable	Counted or updated by the data wizard.
DLD:Lock form	No	Prevents the data wizard from running a count or update while another count or update is in progress.
CAI plugins	Not applicable	Breaks the workflow from the user interface, which releases control to the user.

When the user performs a count or update, the data wizard performs the following steps:

1 The user completes the information about the Data Wizard Console and clicks **Go**.

2 The data wizard uses the DLD:SYS:DataWizAction form to create a new record in the DLD:Lock form.

3 The DLD:SYS:DataWizAction form pushes to the CAI plugin, which releases console control back to the user.

4 The CAI plugin continues to run filter actions on the DLD:SYS:DataWizAction form.

5 The DLD:SYS:DataWizAction form copies the list of forms from the DLD:SYS:DataWizardProducts form.

6 The DLD:SYS:DataWizAction form updates the status on the DLD:SYS:DataWizardStatus form to In progress.

7 The DLD:SYS:DataWizAction form counts and updates target forms.

8 The DLD:SYS:DataWizAction form gets the number of records to be updated (only for a count).

9 For each form that contains one or more fields of the data administration type, the DLD:SYSDataWizAction form creates a record on the DLD:SYS:DataWizAudit form.

10 The DLD:SYS:DataWizAction form updates the status on the DLD:SYS:DataWizardStatus form to Completed.

11 The DLD:SYSDataWizAction form deletes the record from the DLD:Lock form.

The filter actions in Table 24 on page 118 control the data wizard.

Table 24: Filter actions for the data wizard

Execution order range	Filter actions	Range to customize
0 - 149	Validation. Check and create a DLD:Lock record	None
150	Push to CAI plugin	None
200 - 499	Perform count	400 - 499
500 - 849	Perform update	700 - 799
850	Related to updating categorizations	None
900	Deletes the DLD:Lock record	None

Modifying the data wizard to work with new forms

To modify the data wizard to work with a new form, you must:

- Add a record to the DLD:SYS:DataWizardProductStatus form to indicate the new form.
- Add filters to the DLD:SYS:DataWizAction form to perform all the steps required for both the count and update actions.

Note

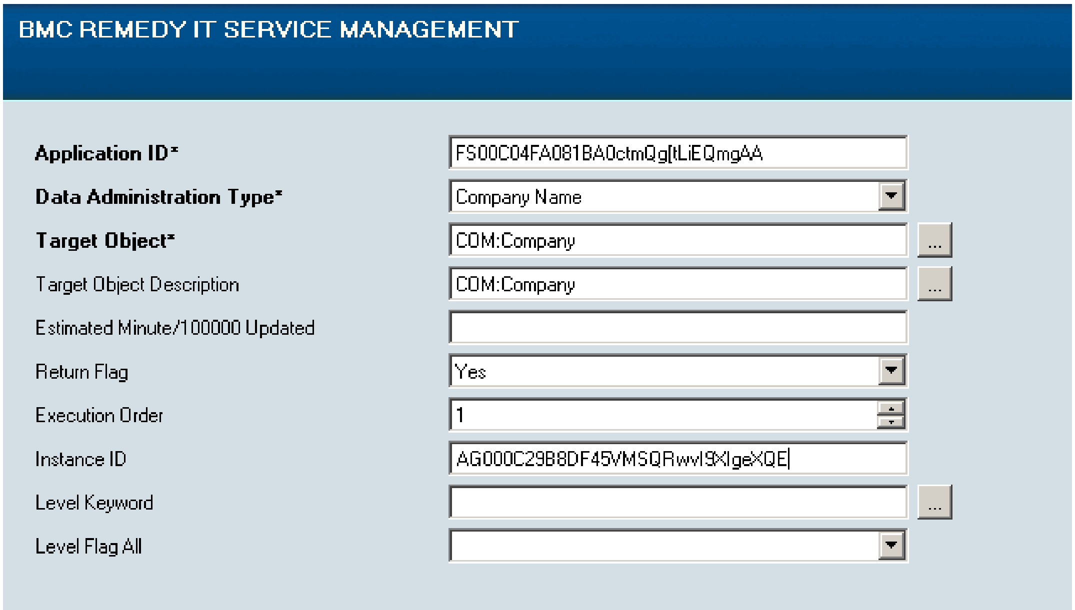
Throughout this chapter, *newFieldIDCustom* refers to the customized new field and not the new value field from the console.

To modify the data wizard to work with new forms

1 Choose **Start => Programs => BMC Software => AR System => BMC Remedy User** and log on.

2 In BMC Remedy User, open DLD:SYS:DataWizardProductStatus.

Figure 52: Example of a record in the DLD:SYS:DataWizardProductStatus form



3 Create a record for each new form and complete the fields, as indicated in Table 25 on page 119.

If a group of forms belongs to the same application and contains fields of the same data type, you can create a single record for the group of forms. If a form contains multiple fields of different data types, you must create a record for each data type.

Table 25: Fields on DLD:SYS:DataWizardProductStatus

Field	Description
Application ID	Contains the ID of the BMC Remedy AR System application to which the form belongs. This ID is listed on the SHARE:Application_Properties form.
Data Administration Type	The type of data of the field on the form. Select from the types of data that can be updated, such as Company Name.
Target Object	The name of the form or the name of the group of forms.
Target Option Description	A description of the target object.

Field	Description
Estimated Minute/10000 Updated	Not used. Leave this field blank.
Execution Order	Use an execution order in the 800–1000 range. Other values are reserved for BMC.
Instance ID	Automatically generated when you save the form.
Level Keyword	Leave this field blank.
Level Flag All	Leave this field blank.

4 Open BMC Remedy Developer Studio.

5 Create the count action filter on the DLD:SYS:DataWizAction form, as described in Details of the count action filter for new forms on page 120.

6 Create the modify action filter on the DLD:SYS:DataWizAction form, as described in Details of modify action filter for new forms on page 122.

Details of the count action filter for new forms

The filter runs on Modify. Specify an execution order within the 400–499 range.

The filters' Run If qualification is the following statement: `( 'z1D Action' = "STARTDATAWIZCOUNT" ) AND ( 'DataAdministrationType' = "`*`dataType`*`")`

The *dataType* is the data type of the field, such as Company Name.

In the count filter, create the actions listed in the following table. The actions must run in the specified sequence.

Table 26: Actions for the count action filter

Sequence	Action	Field on Filter window	Value
1	Set Fields	Server Name	CURRENT TRANSACTION
		Read Value for Field From	CURRENT TRANSACTION
		Name	z1D_TargetObject (name of the form that becomes the value specified in Value, which follows)
		Value	*formName* where *formName* is the name of the new form or new group of forms that you specified on DLD:SYS:DataWizardProductStatus. *Name* (in the preceding row) is set to the value specified here. For example, z1D_FormName in the row above would be set to the *formName* value specified here.

Sequence	Action	Field on Filter window	Value
2	Call Guide	not applicable	DLD:DAT:SetStatusInProgress
3	Set Fields	Server Name	*serverName*
		Read Value for Field From	SQL
		SQL Command	`SELECT schemaId FROM arschema WHERE name = 'formName'`
		Name	z1D_FormName (name of the form that becomes the value specified in Value)
		Value	*formName* which specifies the value to which Name (in the proceeding row) is set. For example, z1D_FormName in the row above would be set to the *formName* value specified here.
		Name	z1D_schemaID (name of the field that becomes the value specified in Value, which follows)
		Value	"T" + 1, which specifies the value to which Name (in the preceding row) is set. For example, z1D_schemaID in the row above would be set to "T" + 1.
4	Set Fields	Server Name	*serverName*
		Read Value for Field From	SQL
		SQL Command	`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C newFieldIDCustom = '$ targetFieldName $'` **Note:** The exact SELECT SQL command depends on the number of fields of the same date type on the form. **Note:** *newFieldIDCustom* is the customized new field and not the new value field from the console.
		Name	z1D_RecordCount01 (name of the field that becomes the value specified in Value, which follows)
		Value	1 , which specifies the value to which Name (in the preceding row) is set. For example, z1D_schemaID in the row above would be set to 1.
5	Call Guide	not applicable	DLD:DAT:Count_PushToAudit
Note: If the target object is a group of forms, for each form, repeat the actions from sequence 3 through 5, before you continue with sequence 6.			
6	Call Guide	not applicable	DLD:DAT:SetStatusComplete

Details of modify action filter for new forms

The filter runs on Modify. Specify an execution order within the 700–799 range.

The filter's Run If qualification is the following statement: `( 'z1D Action' = "STARTDATAWIZUPDATE" ) AND ( 'DataAdministrationType' = "`*`dataType`*`")`

The *dataType* placeholder refers to the data type of the field, such as Company Name.

In the count filter, create the actions listed in Table 27 on page 122. The actions must run in the specified sequence.

Table 27: Actions for the update action filter

Sequence	Action	Field on Filter window	Value
1	Set Fields	Server Name	CURRENT TRANSACTION
		Read Value for Field From	CURRENT TRANSACTION
		Name	z1D_TargetObject (name of the form that becomes the value specified in Value, which follows)
		Value	*formName*, where *formName* is the name of the new form or name of the new group of forms that you specified on DLD:SYS:DataWizardProductStatus
2	Call Guide	not applicable	DLD:DAT:SetStatusInProgress
3	Set Fields	Server Name	*serverName*
		Read Value for Field From	SQL
		SQL Command	`SELECT schemaId FROM arschema WHERE name = '` *`formName`* `'`
		Name	z1D_FormName (name of the form that becomes the value specified in Value)
		Value	*formName*, which specifies the value to which Name (in the preceding row) is set. For example, z1D_FormName in the row above would be set to the *formName* value specified here.
		Name	z1D_schemaID (name of the field that becomes the value specified in Value, which follows)
		Value	"T" + 1 , which specifies the value to which Name (in the preceding row) is set. For example, z1D_schemaID in the row above would be set to "T" + 1.

Sequence	Action	Field on Filter window	Value
4	Direct SQL	Server Name	*serverName*
		SQL Command	`UPDATE $z1D_schemaID$ SET C` *`newFieldIDCustom`* `= '$` *`newFieldNameFromConsole`* `$' WHERE C` *`newFieldIDCustom`* `= '$` *`targetFieldNameFromConsole`* `$'` **Note:** The exact UPDATE SQL command depends on the number of fields of the same data type on the form.
5	Set Fields	Server Name	*serverName*
		Read Value for Field From	SQL
		SQL Command	`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C` *`newFieldIDCustom`* `= '$` *`newFieldNameFromConsole`* `$'` **Note:** The exact SELECT SQL command depends on the number of fields of the same date type on the form.
		Name	z1D_RecordCount02 (name of the field that becomes the value specified in Value, which follows)
		Value	1 , which specifies the value to which Name (in the preceding row) is set. For example, z1D_schemaID in the row above would be set to 1.
6	Call Guide	not applicable	DLD:DAT:Update_PushToAudit
Note: If the target object is a group of forms, for each form, repeat the actions from sequence 3 through 6, before you continue with sequence 7.			
7	Call Guide	not applicable	DLD:DAT:SetStatusComplete

Modifying the data wizard to work with new fields on BMC Remedy ITSM forms

To modify the data wizard to work with new fields on BMC Remedy ITSM forms, you must modify filters on the DLD:SYS:DataWizAction form. Perform the following procedure for each new field on BMC Remedy ITSM forms.

To modify the data wizard to work with new fields on BMC Remedy ITSM

1 Open BMC Remedy Developer Studio.

2 Search for the filter on the DLD:SYS:DataWizAction form that contains the count action for the form that contains the new field.

Use the following information to find the appropriate filter:

- Count filters created by BMC are in the execution order 200–399 range.
- Count Filters created by BMC follow a naming convention. They start with either DLD:DAT:*dataAdministrationType*_Count or INT:*Application*:DAT:*dataAdministrationType*_Count. For example, the count filter for the Company Name field on the HPD:HelpDesk form is named INT:FNDHPD:DAT:CompanyLargeForms_Count_Q.
- Forms that are included in a filter are sometimes listed in the Help Text tab of the filter.

3 In the Set Field action that performs the count action, modify the SQL statement to include the new field.

The following SQL statement is an example for counting the Company field:

```
SELECT COUNT(C1)  FROM $z1D_schemaID$ WHERE C1000000001 = '$Company$' OR
CnewFieldIDCustom = '$Company$'
```

For additional examples of SQL statements, see Examples of SQL statements on page 129.

4 Search for the filter on the DLD:SYS:DataWizAction form that contains the update action for the form that contains the new field.

- Update filters created by BMC are in the execution order 500–699 range.
- Update Filters created by BMC follow a naming convention. They start with either DLD:DAT:*dataAdministrationType*_Update or INT:*Application*:DAT:*dataAdministrationType*_Update. For example, the update filter for the Company Name field on the HPD:HelpDesk form is named INT:FNDHPD:DAT:CompanyLargeForms_Update_Q`!.
- Forms that are included in a filter are sometimes listed in the Help Text tab of the filter.

5 In the Set Field action that performs the update action, modify the SQL statement to include the new field.

The following SQL statement is a simple example for updating the Company field:

```
UPDATE $z1D_schemaID$ SET C1000000001 = '$Company_NewVal$',
CnewFieldIDCustom = '$Company_NewVal$'  WHERE C1000000001 = '$Company$' OR
CnewFieldIDCustom = '$Company$'
```

The following SQL statement is an example for updating the Company field with a CASE statement. When two or more fields are updated on a form, CASE statements are used to improve performance.

```
UPDATE $z1D_schemaID$ SET
C1000000001 = case C1000000001 when '$Company$' then '$Company_NewVal$'
else C1000000001 end,
C1000003965 = case C1000003965 when '$Company$' then '$Company_NewVal$'
else C1000003965 end,
CnewFieldIDCustom = case CnewFieldIDCustom when '$Company$' then
'$Company_NewVal$' else CnewFieldIDCustom end,
WHERE (C1000000001 = '$Company$' OR C1000003965 = '$Company$' OR
CnewFieldIDCustom = '$Company$')
```

6 A Set Field action after the update action performs a count. Modify the SQL statement in this action to include the new field.

The following SQL statement is an example for counting the Company field after the update action:

```
SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000001 = '$Company_NewVal
$' OR CnewFieldIDCustom = '$Company_NewVal$'
```

Field names of target and new value fields from the Data Wizard Console

When you modify an SQL statement, use the following tables to look up the target value database field name and new value database field name for use in the SQL statement.

Company

The Fields IDs for the company target and new value fields table shows the values for a data administration type of Company.

Table 28: Field IDs for the Company target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
Company	1000000001	Company_NewVal	303215800

Person name

This section shows the values for a data administration type of Person Name.

Table 29: Field IDs for the Person Name target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
Company_PersonName **Note:** This field is required to perform a count or update. The Company_PersonName field, however, is not updated.	303216100	Not applicable	Not applicable
FirstName_OriVal	303216800	FirstName_NewVal	303217400
MiddleName_OriVal	303216700	MiddleName_NewVal	303217300
LastName_OriVal	303216600	LastName_NewVal	303217200
PersonID **Note:** This field is required to perform a count or update. The PersonID field, however, is not updated.	301352100	Not applicable	Not applicable
LoginID_PersonName	301921200	Not applicable	Not applicable

Login ID

This section lists the values for a data administration type of Login ID.

Table 30: Field IDs for the Login ID target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
LoginID_OriVal	303219700	LoginID_NewVal	303219800

Generic categorization

This section lists the values for a data administration type of Generic Categorization.

Table 31: Field IDs for the Generic Categorization target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
Category Type **Note:** This field is required to perform a count or update. The Category Type field, however, is not updated.	1000002257	Not applicable	Not applicable
Generic Categorization Tier 1	1000000744	GenericCatTier1_NewVal	303221200
Generic Categorization Tier 2	1000000745	GenericCatTier2_NewVal	303221300
Generic Categorization Tier 3	1000000746	GenericCatTier3_NewVal	303221400

Operational categorization

This section lists the values for a data administration type of Operational Categorization.

Table 32: Field IDs for the Organization Categorization target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
Categorization Tier 1	1000000063	OperationalCatTier1_NewVal	303228300
Categorization Tier 2	1000000064	OperationalCatTier2_NewVal	303228400
Categorization Tier 3	1000000065	OperationalCatTier3_NewVal	303228500

Product categorization

This section shows the values for a data administration type of Product Categorization.

Table 33: Field IDs for the Product Categorization target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
CI Type **Note:** This field is used as part of search criteria. The CI Type field, however, is neither counted nor updated.	301189500	Not applicable	Not applicable
Product Categorization Tier 1	200000003	ProductCatTier1_NewVal	303229400
Product Categorization Tier 2	200000004	ProductCatTier2_NewVal	303229500
Product Categorization Tier 3	200000005	ProductCatTier3_NewVal	303229600
Product Name	240001002	ProductName_NewVal	303229700
Manufacturer	240001003	Manufacturer_NewVal	303229800

Product model and version

This section shows the values for a data administration type of Product Model/Version.

Table 34: Field IDs for the Product Model/Version target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
ProductCatTier1_MV **Note:** This field is required to perform a count or update. The ProductCatTier1_MV field, however, is not updated.	303231000	Not applicable	Not applicable
ProductCatTier2_MV	303231100	Not applicable	Not applicable

Target value database field name	Target value field ID	New value database field name	New value field ID
ProductCatTier3_MV	303231200	Not applicable	Not applicable
ProductName_MV	303231400	Not applicable	Not applicable
Manufacturer_MV	303231500	Not applicable	Not applicable
Product Model/Version	240001005	ProductMV_NewVal	303221400

Site name

This section shows the values for a data administration type of Site Name.

Table 35: Field IDs for the Site Name target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
Site	260000001	Site_NewVal	303232800

Site information

This section shows the values for a data administration type of Site Information.

Table 36: Field IDs for the Product Model/Version target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
SiteName_SiteInfo **Note:** This field is required to perform a count or update. The SiteName_SiteInfo field, however, is not updated.	303233800	Not applicable	Not applicable
Not applicable	Not applicable	Street_NewVal	303234000
Not applicable	Not applicable	Country_NewVal	303234100
Not applicable	Not applicable	StateProvince_NewVal	303234200
Not applicable	Not applicable	City_NewVal	303234300
Not applicable	Not applicable	ZipPostalCode_NewVal	303234400
Not applicable	Not applicable	TimeZone_NewVal	303235000

Support group

This section shows the values for a data administration type of Support Group.

Table 37: Field IDs for the Support Group target and new value fields

Target value database field name	Target value field ID	New value database field name	New value field ID
SupportCompany_SGP **Note:** This field is used as part of search criteria. The SupportCompany_SGP field, however, is neither counted nor updated.	303215700	Not applicable	Not applicable
Support Organization	1000000014	SupportOrganization_NewVal	303235900
Support Group Name	1000000015	SupportGroupName_NewVal	303236000

Examples of SQL statements

When you modify an SQL statement, look up the example SQL statement for the applicable data administration type in the following sections.

Company

The following example is for the count action:

- Form—CTM:People
- Filter—DLD:DAT:CompanyCTMLargeForms_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000001 = '$Company$'`

  The following example is for the update action:

- Form—CTM:People
- Filter—DLD:DAT:CompanyCTMLargeForms_Update`!_Q
- SQL statement—`UPDATE $z1D_schemaID$ SET C1000000001 = '$Company_NewVal$' WHERE C1000000001 = '$Company$'`

Person name

You must use either the person ID or login ID to count or update the person name. This ID is used in the WHERE clause of the SQL statement.

The following example is for the count action when the full name is on the form:

- Form—CTM:Support Group Association
- Filter—DLD:DAT:PersonNameLargeForms_Count_Q

- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000080 = '$PersonID$'`

  The following example is for the update action when the full name is on the form:

- Form—CTM:Support Group Association
- Filter—DLD:DAT:PersonNameLargeForms_Update`!_Q
- SQL statement—`UPDATE $z1D_schemaID$ SET C1000000017 = '$FullName_NewVal$' WHERE C1000000080 = '$PersonID$'`

  The following example is for the count action when the full name, first name, and last name are on the form:

- Form—APR:Approver Lookup
- Filter—DLD:DAT:PersonNameWithLoginIDOther_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000080 = '$PersonID$'`

  The following example is for the update action when the full name, first name, and last name are on the form:

- Form—APR:Approver Lookup
- Filter—DLD:DAT:PersonNameWithLoginIDOther_Count`!_Q
- SQL statement:
-
```
UPDATE $z1D_schemaID$ SET
C1000000637 = CASE WHEN (C1000000080 = '$PersonID$') THEN '$FullName_NewVal
$' ELSE C1000000637 END,
C1000000369 = CASE WHEN (C1000000080 = '$PersonID$') THEN
'$FirstName_NewVal$' ELSE C1000000369 END,
C1000000367 = CASE WHEN (C1000000080 = '$PersonID$') THEN '$LastName_NewVal
$' ELSE C1000000367 END
WHERE (C1000000080 = '$PersonID$')
```

Login ID

The following example is for the count action:

- Form—CTM:People WorkLog
- Filter—DLD:DAT:LoginIDCTM2_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C2 = '$LoginID_OriVal$' OR C5 = '$LoginID_OriVal$' OR C1000000159 = '$LoginID_OriVal$'`

  The following example is for the update action:

- Form—CTM:People WorkLog

- Filter—DLD:DAT:LoginIDCTM2_Count`!_Q
- SQL statement:

```
UPDATE $z1D_schemaID$ SET
C2 = CASE C2 WHEN '$LoginID_OriVal$' THEN '$LoginID_NewVal$' ELSE C2 END,
C1000000159 = CASE C1000000159 WHEN '$LoginID_OriVal$' THEN
'$LoginID_NewVal$' ELSE C1000000159 END,
C5 = CASE C5 WHEN '$LoginID_OriVal$' THEN '$LoginID_NewVal$' ELSE C5 END
WHERE (C2 = '$LoginID_OriVal$' OR C1000000159 = '$LoginID_OriVal$' OR C5 =
'$LoginID_OriVal$')
```

Generic categorization

To count or update categorizations, you need a filter for each level of categorization on the form. Whether a filter runs depends on which tiers the user specifies on the Data Wizard Console with new values.

For example, if Tier 1, 2, and 3 are on the form, then three separate filters are needed to perform the action. One filter contains the SQL statement to count or update for all three tiers. Another filter will act on the first two tiers. Another filter acts on just the first tier. On the Data Wizard Console, if the user specifies all three tiers with new values, all three filters run. If the user specifies a new values for only Tier 1, only the filter containing Tier 1 runs.

If only Tier 1 and 2 are on the form, you need only two filters.

Category type is used in the SQL statements. If the category type is always the same for categorization, omit this field from the SQL statement. Otherwise, hard code the value in the SQL statement.

The following example is for the count action when all three tiers are on the form:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:GenCatTier3LargeForms_Count_Q
- SQL statement:

```
SELECT COUNT(C1)  FROM $z1D_schemaID$ WHERE
C1000000744 = '$Generic Categorization Tier 1$'  AND C1000000745
= '$Generic Categorization Tier 2$' AND C1000000746 = '$Generic
Categorization Tier 3$' AND C1000002257 = '$Category Type$'
```

The following example is for the update action when all three tiers are on the form:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:GenCatTier3LargeForms_Update`!_Q
- SQL statement:

```
UPDATE $z1D_schemaID$ SET C1000000744 =
'$GenericCatTier1_NewVal$', C1000000745 =
'$GenericCatTier2_NewVal$', C1000000746 =
'$GenericCatTier3_NewVal$' WHERE C1000000744 =
```

```
'$Generic Categorization Tier 1$' AND C1000000745 =
'$Generic Categorization Tier 2$' AND C1000000746 =
'$Generic Categorization Tier 3$' AND C1000002257 = '$Category Type$'
```

The following example is for the count action when the first two tiers are on the form:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:GenCatTier2LargeForms_Count_Q
- SQL statement:

```
SELECT COUNT(C1)  FROM $z1D_schemaID$ WHERE
C1000000744 = '$Generic Categorization Tier 1$'  AND C1000000745 =
'$Generic Categorization Tier 2$' AND C1000002257 = '$Category Type$'
```

The following example is for the update action when the first two tiers are on the form:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:GenCatTier2LargeForms_Update`!_Q
- SQL statement:

```
UPDATE $z1D_schemaID$ SET C1000000744 =
'$GenericCatTier1_NewVal$', C1000000745 =
'$GenericCatTier2_NewVal$' WHERE C1000000744 =
'$Generic Categorization Tier 1$' AND C1000000745 =
'$Generic Categorization Tier 2$' AND C1000002257 = '$Category Type$'
```

Operational categorization

Like generic categorization, operational categorization has multiple tiers of categorization that require multiple filters.

The following example is for the count action when two tiers are on the form:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:OperCatTier2LargeForms_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000063 = '$Categorization Tier 1$' AND C1000000064 = '$Categorization Tier 2$'`

  The following example is for the update action when two tiers are on the form:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:OperCatTier2LargeForms_Update`!_Q
- SQL statement—`UPDATE $z1D_schemaID$ SET C1000000063 = '$OperationalCatTier1_NewVal$', C1000000064 = '$OperationalCatTier2_NewVal$' WHERE C1000000063 =`

`'$Categorization Tier 1$' AND C1000000064 = '$Categorization Tier 2$'`

The following example is for the count action for tier 1:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:OperCatTier1LargeForms_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000063 = '$Categorization Tier 1$'`

The following example is for the update action for tier 1:

- Form—CFG:GenericProdServiceAssoc
- Filter—DLD:DAT:OperCatTier1LargeForms_Update`!_Q
- SQL statement—`UPDATE $z1D_schemaID$ SET C1000000063 = '$OperationalCatTier1_NewVal$' WHERE C1000000063 = '$Categorization Tier 1$'`

Product categorization

Like generic categorization, product categorization has multiple tiers of categorization that require multiple filters.

The following example is for the count action for all three tiers:

- Form—CFG:Group Event Mapping
- Filter—DAT:ProdCatAllTiersOther1_Count_Q
- SQL statement:

```
SELECT COUNT(C1)  FROM $z1D_schemaID$ WHERE
(C200000003 = '$Product Categorization Tier 1$'  AND C200000004 =
'$Product Categorization Tier 2$' AND C200000005 =
'$Product Categorization Tier 3$'  AND C240001002 = '$Product Name$' AND
C240001003 = '$Manufacturer$')
```

The following example is for the update action for all three tiers:

- Form—CFG:Group Event Mapping
- Filter—DLD:DAT:ProdCatAllTiersOther4_Update`!_Q
- SQL statement:

```
UPDATE $z1D_schemaID$ SET C200000003 =
'$ProductCatTier1_NewVal$', C200000004 =
'$ProductCatTier2_NewVal$', C200000005 =
'$ProductCatTier3_NewVal$', C240001002 = '$ProductName_NewVal$',
C240001003 = '$Manufacturer_NewVal$' WHERE C200000003 = '$Product
Categorization Tier 1$' AND C200000004 = '$Product Categorization Tier 2$'
```

```
AND C200000005 = '$Product Categorization Tier 3$' AND
C240001002 = '$Product Name$' AND C240001003 = '$Manufacturer$'
```

Product model and version

The Product Name, Manufacturer, and Product Model/Version fields are referenced in the WHERE clause of the SQL statement.

The following example is for the count action:

- Form—CFG:Group Event Mapping
- Filter—DLD:DAT:ProdMVOther_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE (C240001002 = '$ProductName_MV$' AND C240001003 = '$Manufacturer_MV$' AND C240001005 = '$Product Model/Version$')`

  The following example is for the update action:

- Form—CFG:Group Event Mapping
- Filter—DLD:DAT:ProdMVPCTCFG_Update`!_Q
- SQL statement—`UPDATE $z1D_schemaID$ SET C240001005 = '$ProductMV_NewVal$' WHERE C240001002 = '$ProductName_MV$' AND C240001003 = '$Manufacturer_MV$' AND C240001005 = '$Product Model/Version$'`

Site name

The following example is for the count action:

- Form—CTM:People Template
- Filter—DLD:DAT:SiteOther_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C260000001 = '$Site$'`

  The following example is for the update action:

- Form—CTM:People Template
- Filter—DLD:DAT:SiteOther_Update`!_Q
- SQL statement—`UPDATE $z1D_schemaID$ SET C260000001 = '$Site_NewVal$' WHERE C260000001 = '$Site$'`

Site information

The Site Name field is referenced in the WHERE clause of the SQL statement

The following example is for the count action:

- Form—SIT:Site
- Filter—DLD:DAT:SiteInfoLargeForms_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C260000001 = '$SiteName_SiteInfo$'`

  The following example is for the update action:

- Form—SIT:Site
- Filter—DLD:DAT:SiteInfoLargeForms_Update`!_Q
- SQL statement:

```
UPDATE $z1D_schemaID$ SET C1000000004 =
'$City_NewVal$', C1000000002 = '$Country_NewVal$',  C1000000037 =
'$Street_NewVal$', C1000000003 = '$StateProvince_NewVal$',
C1000000039 = '$ZipPostalCode_NewVal$', C1000000541 =
'$TimeZone_NewVal$' WHERE C260000001 = '$SiteName_SiteInfo$'
```

Support group

To count or update the support group, you might need multiple filters, depending on the number of levels on the form. Whether a filter runs depends on which tiers the user selects on the Data Wizard Console.

For example, if Support Organization and Support Group are on the form, then you need two filters to perform the action. One filter will have the SQL statements to count and update for Support Organization and Support Group; the other filter acts on only the Support Organization. If all tiers are filled in for the new value on the console, both filters run. If only Support Organization is filled in, only the filter containing Support Organization runs.

The following example is for the count action for both the Support Organization and Support Group fields:

- Form—CTM:People Permission Groups
- Filter—DLD:DAT:SGPAllLargeForms_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000001 = '$SupportCompany_SGP$' AND C301363000 = '$Support Organization$' AND C301363100 = '$Support Group Name$'`

  The following example is for the update action for both the Support Organization and Support Group fields:

- Form—CTM:People Permission Groups
- Filter—DLD:DAT:SGPAllLargeForms_Update`!_Q

- SQL statement:

```
UPDATE $z1D_schemaID$ SET C301363000 =
'$SupportOrganization_NewVal$',  C301363100 =
'$SupportGroupName_NewVal$' WHERE C1000000001 =
'$SupportCompany_SGP$'  AND C301363000 =
'$Support Organization$' AND C301363100 = '$Support Group Name$'
```

  The following example is for the count action for the Support Group field only:

- Form—CTM:People Permission Groups
- Filter—DLD:DAT:SGPOrgLargeForms_Count_Q
- SQL statement—`SELECT COUNT(C1) FROM $z1D_schemaID$ WHERE C1000000001 = '$SupportCompany_SGP$' AND C301363000 = '$Support Organization$'`

  The following example is for the update action for the Support Group field only:

- Form—CTM:People Permission Groups
- Filter—DLD:DAT:SGPOrgLargeForms_Update`!_Q
- SQL statement—`UPDATE $z1D_schemaID$ SET C301363000 = '$SupportOrganization_NewVal$' WHERE C1000000001 = '$SupportCompany_SGP$' AND C301363000 = '$Support Organization$'`

Data load staging forms dependencies

The following tables show the dependencies between the data load staging forms.

Foundation staging forms

Parent form	Dependent forms
CFG:LoadGenericCatalog	CFG:LoadGenericCpyModuleAssoc
CFG:LoadGenericProdSerAssoc	CFG:LoadGenericCpyModuleAssoc CTM:LoadPeopleAttributes
CFG:LoadServiceCatalog	CFG:LoadServiceCatalogAssoc CFG:LoadGenericCpyModuleAssoc CTM:LoadPeopleAttributes
COM:LoadCompany	COM:LoadCompanyAlias CTM:LoadRegion SIT:LoadSiteGroup SIT:LoadSiteCompanyAssoc CTM:LoadPeopleOrganization CTM:LoadSupportGroup FIN:LoadConfigCostCentersRep CTM:LoadPeopleTemplate CTM:LoadPeople CTM:LoadPeoplePermissionGroups PCT:LoadProductCatalog PCT:LoadProdComAssoc CFG:LoadServiceCatalogAssoc CFG:LoadGenericCpyModuleAssoc

Parent form	Dependent forms
CTM:LoadPeople	CTM:LoadPeoplePermissionGroups CTM:LoadSupportGroupAssociation CTM:LoadSupportGroupFunctionalRole CTM:LoadPeopleWorkLog NTE:LoadCFGNotificationEvents FIN:LoadCostCenterUDAAssoc CTM:LoadPeopleAttributes
CTM:LoadPeopleOrganization	CTM:LoadPeopleTemplate CTM:LoadPeople
CTM:LoadPeopleTemplate	CTM:LoadPeopleTemplateSG CTM:LoadPeopleTemplatePG CTM:LoadPeopleTemplateSFR CTM:LoadPeople FIN:LoadCostCenterUDAAssoc CTM:LoadPeopleModification
CTM:LoadPeopleTemplatePG	CTM:LoadPeoplePermissionGroups
CTM:LoadPeopleTemplateSG	CTM:LoadPeopleTemplateSFR CTM:LoadSupportGroupAssociation CTM:LoadSupportGroupFunctionalRole
CTM:LoadPostalCodes	Not applicable.
CTM:LoadRegion	SIT:LoadSiteGroup SIT:LoadSiteCompanyAssoc
CTM:LoadSupportGroup	CTM:LoadSupportGroupAlias CTM:LoadSGPAssignments CFG:LoadBusinessTimeWorkdays CFG:LoadBusinessTimeHolidays CTM:LoadSGPOnCall CTM:LoadPeopleTemplateSG CTM:LoadPeopleTemplateSFR CTM:LoadSupportGroupAssocation CTM:LoadSupportGroupFunctionalRole
CTM:LoadSupportGroupAssociation	CTM:LoadSupportGroupFunctionalRole
FIN:LoadConfigCostCentersRep	FIN:LoadCostCenterUDAAssoc CTM:LoadPeople
NTE:LoadCFGPagerServIceConfig	CTM:LoadSGPOnCall CTM:LoadPeople
PCT:LoadProdModelVersion	PCT:LoadModelVersionPatch

Parent form	Dependent forms
PCT:LoadProductCatalog	PCT:LoadProductAlias PCT:LoadProdModelVersion PCT:LoadProdCatAliasMapping PCT:LoadProdComAssoc CFG:LoadGenericCpyModuleAssoc CTM:LoadPeopleAttributes
People	People (parent for itself)
PeopleAttribute	PeopleAttribute (parent for itself)
SIT:LoadSite	SIT:LoadSiteAlias SIT:LoadSiteCompanyAssoc CTM:LoadPeopleTemplate CTM:LoadPeople
SIT:LoadSiteCompanyAssoc	CTM:LoadPeopleTemplate CTM:LoadPeople
SIT:LoadSiteGroup	SIT:LoadSiteCompanyAssoc

Process Setup staging forms

Parent form	Dependent forms
APR:LoadAlternate	Not applicable.
APR:LoadApproverLookup	Not applicable.
CFG:LoadAssignment	Not applicable.
CFG:LoadDecisionTree	CFG:LoadDecisionTreeBranch
CFG:LoadScripts	CFG:LoadGroupEventMapping CTM:LoadDecisionTreeBranch
CHG:LoadTemplate	CHG:LoadTemplateAssociations CHG:LoadTemplateSPGAssoc TMS:LoadAssociationTemplate
HPD:LoadTemplate	HPD:LoadTemplateAssociations HPD:LoadTemplateSPGAssoc
RQC:LoadSummaryDefinition	Not applicable.
TMS:LoadAssociationTemplate	TMS:LoadFlowTemplate
TMS:LoadAssignmentConfig	Not applicable.
TMS:LoadTaskGroupTemplate	TMS:LoadAssociationTemplate TMS:LoadFlowTemplate

Parent form	Dependent forms
TMS:LoadTaskTemplate	TMS:LoadAssociationTemplate

Transaction staging forms

Parent form	Dependent forms
APR:LoadSignature	CHG:LoadInfrastructureChange
AST:LoadAssetPeople	Not applicable.
AST:LoadBMC_BaseRelationship	Not applicable.
AST:LoadLicenseCertificates	AST:LoadLicenseCertificateProductAssociation CTR:LoadContract_Relationship
AST:LoadWorkLog	Not applicable.
CFG:LoadBroadcast	CFG:LoadBroadcastSPGAssoc
CHG:LoadInfrastructureChange	CHG:LoadWorkLog CHG:LoadImpactedAreas APR:LoadSignature TMS:LoadTaskGroup TMS:LoadTask CFG:LoadReminders CFG:LoadBroadcast SHR:LoadAssociations FIN:LoadCosts
CTR:LoadContractBase	CTR:LoadWorkLog CTR:LoadContract_Relationship FIN:LoadPayments FIN:LoadCosts
HPD:LoadHelpDesk	HPD:LoadWorkLog HPD:LoadImpactedAreas TMS:LoadTaskGroup TMS:LoadTask CFG:LoadBroadcast CFG:LoadReminders SHR:LoadAssociations FIN:LoadCosts

Parent form	Dependent forms
PBM:LoadKnownError	PBM:LoadKnownErrorWorkLog TMS:LoadTask CFG:LoadReminders SHR:LoadAssociations FIN:LoadCosts
PBM:LoadProblemInvestigation	PBM:LoadInvestigationWorkLog PBM:LoadImpactedAreas TMS:LoadTask CFG:LoadReminders CFG:LoadBroadcast SHR:LoadAssociations FIN:LoadCosts
PBM:LoadSolutionDatabase	PBM:LoadSolutionDBAlias PBM:LoadSolutionWorklog PBM:LoadSolutionDBAdditionalMappings TMS:LoadTask CFG:LoadReminders SHR:LoadAssociations FIN:LoadCosts
TMS:LoadTask	TMS:LoadTaskGroup
TMS:LoadTaskGroup	TMS:LoadTask TMS:LoadWorkInfo

Error messages

This appendix lists error codes from the dataload process.

Errors for invalid data

The Error codes from invalid data table lists error codes from invalid data that is identified during the validation operation on records in staging forms.

Table 38: Error codes from invalid data

Code	Message	Explanation
100	Invalid Bargaining Unit	The bargaining unit value is not valid. Select the appropriate value.
101	Invalid Benefit Group	The benefit group value is not valid. Select the appropriate value.
102	Invalid Compensation Method	The compensation group value is not valid. Select the appropriate value.
103	Invalid Dental Plan	The dental plan value is not valid. Select the appropriate value.
104	Invalid Employment Status	The employment status value is not valid. Select the appropriate value.
105	Invalid Marital Status	The marital status value is not valid. Select the appropriate value.
106	Invalid Medical Plan	The medical plan value is not valid. Select the appropriate value.
107	Invalid Pension Plan	The pension plan value is not valid. Select the appropriate value.
108	Invalid Person	The person ID value must match a person ID either in the CTM:LoadPeople form or in the CTM:People form. Correct the person ID on this form or on the CTM:LoadPeople form.

Code	Message	Explanation
109	Invalid Operational Category fields for IT skills	One or more of the operational category values is not valid. You can obtain correct values from the CFG:Service Catalog form.
110	Invalid Product Category fields for IT skills	One or more of the product category tier values is not valid. You can obtain correct values from the PCT:Product Catalog form.
111	Invalid category or type	The category and type values must match values in the CFG:Generic Catalog form.
112	Invalid Contact Type	The contact type value is not valid. Select the appropriate value.
113	Invalid Home Country	The home country is not valid. Select the appropriate value.
114	Invalid Manager	The manager's login ID must match a login ID in the CTM:People form. If you do not know the manager's login ID, you can search the CTM:People form on another field, such as last name.
115	Invalid Pager Service Provider	The pager service provider is not valid. Select the appropriate value.
116	Invalid Template	The template name must match a template name either in the CTM:LoadPeopleTemplate form or in the CTM:PeopleTemplate form. Correct the template name on this form or on the CTM:LoadPeopleTemplate form.
117	Invalid Title	The title value is not valid. Select the appropriate value.
118	Invalid Company	The company value is not valid. Select the appropriate value.
119	Invalid Department	The department value is not valid. Select the appropriate value.
120	Invalid Organization	The organization value is not valid. Select the appropriate value.
121	Invalid Site	The site value is not valid. Select the appropriate value.
122	Invalid Site for selected Company	The selected company does not include the specified site. If the company is correct, select the appropriate site. Otherwise, select the appropriate company, and then select the appropriate site.
123	Invalid Support Group	The support group value is not valid. Select the appropriate value.
124	Invalid Permission Group	The permission group is not valid. For a list of valid permission groups, see Permission groups on page 207.

Code	Message	Explanation
125	Invalid Country	The country value is not valid. Select the appropriate value.
126	Invalid Region	The region value is not valid. Select the appropriate value.
127	Invalid Site Group	The site group value is not valid. Select the appropriate value.
128	Invalid City	The city value is not valid. Select the appropriate value.
129	Assignment Group cannot be the same as the Support Group	Change either the Assignment Group or Support Group to make them different.
130	Invalid Assignment Group	The assignment group value is not valid. Select the appropriate value.
131	Invalid Functional Role	The functional role that is selected is not valid or is not applicable to your currently installed applications.
132	Invalid Product Catalog	The product catalog value is not valid. Select the appropriate value.
133	Invalid Product Model/Version	The product model / version value is not valid. Select the appropriate value.
134	Invalid Operational Catalog	The operational catalog value is not valid. Select the appropriate value.
135	Invalid Manufacturer	Manufacturer must match entries found in the Company form or Company staging form with a company type of Manufacturer.
136	Both Start And End Times Must Be Entered Or Left Blank	Either enter both a Start Time and End Time or leave them both blank.
137	Start Time Must Be Earlier Than End Time	Enter a Start Time that is before the End Time.
138	Start Time Of The Next Schedule Must Be Later Than The End Time Of The Previous Schedule	Either change the Start Time of the next schedule to a time that is later than the End Time of the previous schedule or change the End Time of the previous schedule that is earlier than the Start Time of the next schedule.
139	Invalid time zone	The time zone is not valid. For a list of valid time zones, see Time zones on page 218.
140	Invalid Primary Cost Center Code	The primary cost center code is not valid. Select the appropriate value.
141	Invalid Cost Center	The cost center code is not valid. Select the appropriate value.

Code	Message	Explanation
142	Invalid Source Cost Center	The source cost center code is not valid. Select the appropriate value.
143	Person Does Not Have A Primary Cost Center Defined	Define the primary cost center on the Financials tab of the People form.
144	Total Distribution Percentage Is Greater Than 100	Change the percentages so that the Total Distribution Percentage is less than 100.
145	Cost Center And Source Cost Center Must Not Be The Same	Either change the cost center or the source cost center to make them different.
146	The allocation method for the source cost center in the Finance Cost Center Configuration form is not set to 'Equal Distribution' or 'User-Defined Percentage'	Set the source cost center's allocation method in the Finance Cost Center Configuration form to either Equal Distribution or User-Defined Percentage.
147	Relationship Type Must Be Set To Secondary Cost Center	Set the Relationship Type to Secondary Cost Center.
148	Invalid Notification Event For The Module Name	The notification event value is not valid for the module named. Select the appropriate value.
149	Invalid Login ID	The Login ID is not valid. Select the appropriate value.
150	Invalid CI Type	The CI type value is not valid. Select the appropriate value.
151	Invalid Company or Company is not enabled	The company value is either not valid or it is not enabled. Either select the appropriate value or assign the Enabled attribute.
152	Support Group must exist as a valid Support Group on CTM:LoadPeopleTemplatesSG for the specified Template	Either add the support group to match one that has been defined as a valid support group for the specified Template on the CTM:LoadPeopleTemplatesSG form, or correct the referenced support group to match one that has been properly defined.
153	HR Attendance Management record does not exist for the HR Time Management record	HR Time Management is a child record for HR Attendance Management. The HR Attendance Management record must exist already or be included in the HR Attendance Management attribute load for the HR Time Management record to load successfully.
154	Invalid work time. Open Time must be earlier than Close Time for any workday.	Make the work time valid either by making the open time prior to the close time or making the close time later than the open time.
155	Invalid Person ID	The person ID value is not valid. Select the appropriate value.

Code	Message	Explanation
156	The Allocation Method For The Source Cost Center In the FIN:LoadConfigCostCentersRep Form Is Not Set To 'Equal Distribution' Or 'User-Defined Percentage'	Set the allocation method in the FIN:LoadConfigCostCentersRep form to either Equal Distribution or User-Defined Percentage.
157	Invalid Manager Name	The manager name value is not valid. Select the appropriate value.
158	Invalid Generic Catalog	The generic catalog value is not valid. Select the appropriate value.
159	A valid Generic Product Operational relationship record cannot be found	A valid record that matches the record's Generic, Product, and Operational catalog cannot be found in CFG:LoadGenericProdSerAssoc or CFG:GenericProdServiceAssoc forms. You must create a relationship first between those catalog entries before creating a Company Module relationship to it.
160	General Access is automatically given and is not a valid permission group for this form	Delete the general access from the form.
161	Asset Viewer is automatically given	If the following permission groups are specified for the Template Name, Asset Viewer is not valid since it is automatically given: ■ Task Manager ■ Task User ■ Incident User ■ Incident Master ■ Problem User ■ Problem Master ■ Infrastructure Change User ■ Infrastructure Change Master ■ Infrastructure Change Config ■ Purchasing User

Code	Message	Explanation
162	Invalid Client Type	The following client types are valid. You can use either the number or words to specify the client type: ■ 2000 or Office-Based Employee ■ 3000 or Field-Based Employee ■ 4000 or Home-Based Employee ■ 5000 or Contractor ■ 7000 or Customer ■ 8000 or Prospect ■ 10000 or Vendor
163	Invalid Assignment Event	The assignment event value is not valid. Select the appropriate value.
164	Invalid Company, Region, Site Group and Site combination	The combination of the company, region, site group, and site values is not valid. Select the appropriate combination of values.
165	Invalid Process Name	The process name value is not valid. Select the appropriate value.
166	Invalid Contact Company	The specified contact company is not a valid company value. Select the appropriate value.
167	Invalid Currency	The currency value is not valid. Select the appropriate value.
168	Invalid Approval Phase Company and Phase Name combination	The combination of approval phase company and phase name values is not valid. Select the appropriate combination of values.
169	Invalid Company (IA)	IA stands for Impacted Area. Impacted Area is a child form containing organizational structures, such as Company > Region > Site or Group > Site > Organization > Department. Impacted areas can be created from incidents, changes, and assets. The company specified for the impacted area is not a valid company value. Select the appropriate value.
170	Invalid Region (IA) for selected Company (IA)	The region value is not valid for the selected company. Select an appropriate region for the selected company.

Code	Message	Explanation
171	Invalid Site Group (IA) for selected Company (IA)	The site group is not valid for the selected company. Select an appropriate site group for the selected company.
172	Invalid Site (IA) for selected Company (IA)	The site is not valid for the selected company. Select an appropriate site for the selected company.
173	Invalid Company (IA), Organization (IA) and Department (IA) combination	The company, organization, and department combination is not valid. Select the appropriate combination of values.
174	Invalid Requester Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The requestor group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
175	Invalid Requester Group	The requestor group is not valid. Select the appropriate value.
176	Invalid Change Manager Group combination (Company is required when Organization is present, and Organization is required when group is entered)	The change manager group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
177	Invalid Change Manager Group	The change manager group is not valid. Select the appropriate value.
178	Invalid Change Implementer Group combination (Company is required when Organization is present, and Organization is required when group is entered)	The change Implementer group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
179	Invalid Change Implementer Group	The change Implementer group value is not valid. Select the appropriate value.
180	Invalid Change Coordinator Group combination (Company is required when Organization is present, and Organization is required when group is entered)	The change coordinator group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
181	Invalid Change Coordinator Group	The change coordinator group value is not valid. Select the appropriate value.
182	Invalid Alternate Login ID	The alternate login ID value is not valid. Select the appropriate value.
183	Invalid For Login ID	The for login ID value is not valid. Select the appropriate value.
184	Invalid Process	The process value is not valid. Select the appropriate value.

Code	Message	Explanation
185	Invalid Timing Reason for the Class selected	The timing reason is not valid for the selected class. Select the appropriate value.
186	No Configuration Items were found for the selected CI Type	Select a CI type that has associated configuration items.
187	No Configuration Items were found for the CI Name entered	Select a CI name that has associated configuration items.
188	Company (IA) required when any other IA fields are entered	Select a value for company or clear the values from the other IA fields.
189	Invalid Support Group Association Role	The support group association role is not valid. Select the appropriate value.
190	Invalid Assignment Support Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The assignment support group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
191	Invalid Assignment Support Group	The support group specified for assignment support group is not a valid support group value. Select the appropriate value.
192	Invalid Assignee	The assignee is not valid. Select the appropriate value.
193	Invalid Vendor Assignment Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The vendor assignment group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
194	Invalid Vendor Assignment Group	The vendor assignment group is not valid. Select the appropriate value.
195	Invalid Resolution Method	The resolution method is not valid. Select the appropriate value.
196	Invalid Script Type	The script type is not valid. Select the appropriate value.
197	Invalid Company, Organization and Site Group combination	The combination of company, organization, and site is not valid. Select appropriate combination values.
198	Invalid Author	The author is not valid. Select the appropriate value.
199	Invalid Script Description	The script description is not valid. Select the appropriate value.
1000	The Organization Company and Location Company must be the same when creating mapping records for the Incident Management Module	Change either the organization company value or the location company value to be the same.

Code	Message	Explanation
1001	Invalid Resolution Product Categorization	The resolution product categorization is not valid. Select the appropriate value.
1002	Invalid Resolution Product Model/ Version	The resolution product model / version is not valid. Select the appropriate value.
1003	Resolution Category Tier 1 and 2 are required fields when Resolution Category Tier 3 is entered	Either select values for resolution category tier 1 and tier 2, or clear the value selected for resolution category tier 3.
1004	Resolution Category Tier 1 is a required field when either Resolution Category 2 or 3 is entered	Either select a value for resolution category tier 1, or clear the values selected for resolution category tier 2 and tier 3.
1005	Invalid Resolution Categorization	The resolution categorization value is not valid. Select the appropriate value.
1006	Invalid Template Authoring Group	The template authoring group value is not valid. Select the appropriate value.
1007	Invalid Status Reason for the Status selected	The status reason value is not valid for the selected status. Select the appropriate value.
1008	Invalid Resolution Cause	The resolution cause value is not valid. Select the appropriate value.
1009	Invalid Template Authoring Company	The template authoring company value is not valid. Select the appropriate value.
1010	Invalid CI Relationship Type selected	The CI relationship type value is not valid. Select the appropriate value.
1011	Invalid Incident Relationship Type selected	The incident relationship type value is not valid. Select the appropriate value.
1012	Invalid Relationship Type selected	The relationship type value is not valid. Select the appropriate value.
1013	Invalid Locale	The locale value is not valid. Select the appropriate value.
1014	Invalid Solution Database ID	The solution database ID value is not valid. Select the appropriate value.
1015	Invalid Known Error ID	The known error ID value is not valid. Select the appropriate value.
1016	Invalid Decision Tree Description	The decision tree description value is not valid. Select the appropriate value.
1017	Invalid Decision Tree Previous Branch ID	The decision tree previous branch ID value is not valid. Select the appropriate value.
1018	Invalid Decision Tree Main Branch ID	The decision tree main branch ID value is not valid. Select the appropriate value.

Code	Message	Explanation
1019	Decision Tree Branch ID cannot be the same as Decision Tree Main Branch ID	Either change the decision tree branch ID value or the decision tree main branch ID value to make them different.
1020	Decision Tree Branch ID cannot be the same as Decision Tree Previous Branch ID	Either change the decision tree branch ID value or the decision tree previous branch ID value to make them different.
1021	No Configuration Items were found for the CI Name and Reconciliation Identity combination entered	Select a CI name and reconciliation identity combination of values that has associated configuration items.
1022	Invalid Request Identifier Type, BMC Incident Management is not available	Use a request ID that is associated with an installed Remedy component. For example, use one that is not associated with Remedy Incident Management.
1023	Invalid Relationship Type selected	The relationship type value is not valid. Select the appropriate value.
1024	Invalid Request Identifier - To (Request Identifier and Request Identifier type do not match)	For Invalid Request Identifier - To, replace either the request identifier or request identifier type so that they match.
1025	Invalid Request Identifier - From (Request Identifier and Request Identifier type does not match)	For Invalid Request Identifier - From, replace either the request identifier or request identifier type so that they match.
1026	Invalid Customer Person ID	The customer person ID value is not valid. Select the appropriate value.
1027	More than one record on People has matched using Customer's Company, First Name, Middle Name and Last Name	More than one record in the `People.xls` spreadsheet has the same value for customer company, first name, middle name, and last name. This record is likely a duplicate. Delete duplicate records.
1028	Invalid Customer Information	The customer information value is not valid. Select the appropriate value
1029	Invalid Contact Person ID	The contact person ID value is not valid. Select the appropriate value
1030	Invalid Contact Information	The contact information values are not valid. Select the appropriate value
1031	More than one record on People has matched using Contact's Company, First Name, Middle Name and Last Name	More than one record in the `People.xls` spreadsheet has the same value for contact company, first name, middle name, and last name. This record is likely a duplicate. Delete duplicate records.
1032	Invalid Site for selected Customer Company	The site value is not valid for the selected customer company. Select the appropriate value
1033	Invalid Site for selected Contact Company	The site value is not valid for the selected contact company. Select the appropriate value

Code	Message	Explanation
1034	Invalid Customer Company	The customer company value is not valid. Select the appropriate value
1035	Invalid Owner Support Group	The owner support group value is not valid. Select the appropriate value.
1036	Invalid Owner	The owner value is not valid. Select the appropriate value.
1037	Invalid Vendor Contact	The vendor contact value is not valid. Select the appropriate value.
1038	More than one record on People has matched using Vendor's Company, First Name, Last Name and Phone Number	More than one record in the `People.xls` spreadsheet has the same value for vendor's company, first name, last name, and phone number. This record is likely a duplicate. Delete duplicate records.
1039	New is not a valid Status	Change the New status value to a valid status value.
1040	No Default Group was found for the Assignee	Change the assignee to one which has associated default groups.
1041	No Default Group was found for the Owner	Change the owner to one which has associated default groups.
1042	Invalid Change Request Status	The status indicates that the change request is in an active approval state so there should be pending approval signatures on the APR:LoadSignature form. However, there are no Pending Approval Signatures. Change the status of the change request to something other than active approval.
1043	Invalid Incident Number	The incident number value is not valid. Select the appropriate value.
1044	More than one Assignee was found for the specified Support Company, Support Organization and Assigned Group with the same name	There are duplicate assignees with the same support company, support organization, and assigned group. Remove the duplicates.
1045	More than one Owner was found for the specified Owner Support Company, Owner Support Organization and Owner Group with the same name	There are duplicate owners with the same owner support company, owner support organization, and owner group. Remove the duplicates.
1046	More than one Assignee was found with the same name. Try using the Assignee Login ID or the Support Company, Support Organization and Assigned Group fields to narrow the search	There are duplicate assignees with the same name. To narrow the search, enter search criteria in the assignee login ID, support company, support organization, assigned group, or any combination of these fields.

Code	Message	Explanation
1047	More than one Owner was found with the same name. Try using the Owner Login ID or the Owner Support Company, Owner Support Organization and Owner Group fields to narrow the search	There are duplicate owners with the same name. To narrow the search, enter search criteria in the owner login ID, owner support company, owner support organization, owner group, or any combination of these fields.
1048	Incident associating From is set as Duplicate - Can not make any Associations to this incident	Replace the incident referenced in Incident Associating From with an incident that is not duplicate.
1049	Incident associating From is set as Original - Can not use Relationship Type as Duplicate of for this incident	Replace the incident referenced in Incident Associating From with an incident that is not original, or change the Relationship Type to a type other than Duplicate.
1050	The process specified indicates that it is the current process for the parent record	The process specified indicates that it is the current process for the parent record. Change the status for the parent record so that it is in an active approval state.
1051	Invalid Owner Support Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The owner support group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
1052	Incident associating From will be set to Duplicate during promotion - Can not make any further Associations to this incident	Either clear the associations being made to the incident referenced in Incident associating From or replace the incident reference with one that will not become a duplicate during promotion.
1053	Incident associating From will be set to Original during promotion - Can not use Relationship Type as Duplicate of for this incident	Either reference an incident in Incident associating From that has a Relationship Type other than Duplicate or replace the incident reference with one that will not be set to original during promotion.
1054	Incident associating To will be set to Original during promotion - Can not use Relationship Type as Original of for this incident	Either reference an incident in Incident associating To that has a Relationship Type other than Original or replace the incident reference with one that will not be set to original during promotion.
1055	Incident associating To will be set to Duplicate during promotion - Can not make any further Associations to this incident	Either clear the associations being made to the incident referenced in Incident associating To or replace the incident reference with one that will not become a duplicate during promotion.
1056	Invalid Request ID	The request ID value is not valid. Select the appropriate value.
1057	Invalid Recipient Group	The recipient group value is not valid. Select the appropriate value.
1058	Invalid Recipient Person ID	The recipient person ID value is not valid. Select the appropriate value.

Code	Message	Explanation
1059	Invalid Recipient	The recipient value is not valid. Select the appropriate value.
1060	More than one People record matches Recipient	More than one records in the `Transactional-SharedComponents.xls` spreadsheet has the same value in the Recipient column on the CFG-Reminders tab. Replace the recipient with a more specific name. For example, if you have just included first name, add the last name; if you have both first and last name and it is still is not unique, add a middle initial or name.
1061	Request Identifier - To and Request Identifier - From cannot be the same	Change either the request identifier to value or the request identifier from value to make them different.
1062	Invalid Requester Person	The requestor person value is not valid. Select the appropriate value.
1063	Invalid Requested For Person	The requested for person value is not valid. Select the appropriate value.
1064	More than one People record matches Requester	There are duplicate records with the same Requester in `People.xls`. Remove the duplicates.
1065	More than one People record matches Requested For	There are duplicate records with the same Requester For in `People.xls`. Remove the duplicates.
1066	Invalid Requester Support Group	The requestor support group value is not valid. Select the appropriate value.
1067	Invalid Requester Person ID	The requestor person ID value is not valid. Select the appropriate value.
1068	Invalid Requested For Person ID	The requested for person ID value is not valid. Select the appropriate value.
1069	Invalid Assignee Group	The assignee group value is not valid. Select the appropriate value.
1070	Scheduled Start Date cannot be after Scheduled End Date	Change either the scheduled start date or scheduled end date so that the scheduled start date precedes the scheduled end date.
1071	Actual Start Date cannot be after Actual End Date	Change either the actual start date or actual end date so that the scheduled start date precedes the scheduled end date.
1072	Company and Cost Center Code combination is not valid or Cost Center is not set to Active	Either change the values in the company or cost center code to make the combination of values valid or set the cost center to active.
1073	Invalid Cost Type	The cost type value is not valid. Select the appropriate value.
1074	Invalid Identifier	The identifier value is not valid. Select the appropriate value.

Code	Message	Explanation
1075	No Default Group was found for the Problem Coordinator Assignee or Problem Coordinator Assignee Login	Provide the default group that is missing from either the problem coordinator assignee or problem coordinator assignee login.
1076	More than one Problem Coordinator (PC) Assignee was found with the same name. Try using the PC Assignee Login or the PC Support Company, PC Support Organization and PC Assigned Group fields to narrow the search	There are duplicate problem coordinator (PC) assignees with the same name. To narrow the search, enter search criteria in the PC Assignee Login, PC Support Company, PC Support Organization, PC Assigned Group, or any combination of these fields.
1077	Invalid Problem Coordinator Assignee	The problem coordinator assignee value is not valid. Select the appropriate value.
1078	More than one Problem Coordinator (PC) Assignee was found for the specified Coordinator Support Company, Coordinator Support Organization and Coordinator Assigned Group with the same name	There are duplicate problem coordinator (PC) assignees with the same name. To narrow the search, enter search criteria in the PC Support Company, PC Support Organization, PC Assigned Group, or any combination of these fields.
1079	Invalid Problem Coordinator Assigned Group	The problem coordinator assigned group value is not valid. Select the appropriate value.
1080	Problem Coordinator Assignee Login or Problem Coordinator Assignee do not have Problem Coordinator functional role	Check the Problem Coordinator Functional Role in the Support Groups tab of People form.
1081	Invalid Vendor Name	The vendor value is not valid. Select the appropriate value.
1082	Invalid Root Cause	The root cause value is not valid. Select the appropriate value.
1083	Invalid Coordinator Support Company	The coordinator support company value is not valid. Select the appropriate value.
1084	Invalid Coordinator Support Organization	The coordinator support organization value is not valid. Select the appropriate value.
1085	Invalid Coordinator Support Group	The coordinator support group value is not valid. Select the appropriate value.
1086	Invalid Implementer Support Company	The implementer support company value is not valid. Select the appropriate value.
1087	Invalid Implementer Support Organization	The implementer support organization value is not valid. Select the appropriate value.
1088	Invalid Implementer Support Group	The implementer support group value is not valid. Select the appropriate value.
1089	Invalid Association (Can not make associations to Solution Database from Infrastructure Change)	Change the association to one that is valid.

Code	Message	Explanation
1090	Invalid Requester Company	The requester company value is not valid. Select the appropriate value.
1091	Invalid Request Identifier Type, BMC Problem Management is not available	Use a request identifier type that is associated with a Remedy component that is installed. For example, use a request identifier type that is not associated with Remedy Problem Management.
1092	Invalid Request Identifier Type, BMC Change Management is not available	Use a request identifier type that is associated with a Remedy component that is installed. For example, use a request identifier type that is not associated with Remedy Change Management.
1093	Invalid Request Identifier Type - From (Can not make associations From Solution Database)	Change the Request Identifier Type - From to one that is valid.
1094	Invalid Problem Investigation Location Information	The problem investigation location is not valid. Select the appropriate values.
1095	The Support Organization and Support Group Name of the Requester is not valid.	The requester's support organization and support group name values are not valid. Select the appropriate values.
1096	Invalid Problem Assignment Support Group	The problem assignment support group value is not valid. Select the appropriate value.
1097	Invalid Problem Coordinator Assignment Support Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The problem coordinator assignment support group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
1098	Invalid Problem Assignment Support Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The problem assignment support group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
1099	Invalid Known Error Assignment Support Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The known error assignment support group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
1100	Broadcast Start Date cannot be greater than Broadcast End Date	Change either the broadcast start date or the broadcast end date so that broadcast start date precedes broadcast end date.
1101	Invalid Broadcast Originated From; BMC Remedy Incident Management is not available	The Broadcast Originated From value is not valid. Select a value that does not require Remedy Incident Management to be installed. For example, numbers prefixed by HPD require Remedy Incident Management be installed.

Code	Message	Explanation
1102	Invalid Broadcast Originated From; BMC Remedy Change Management is not available	The Broadcast Originated From value is not valid. Select a value that does not require Remedy Change Management to be installed. For example, numbers prefixed by CHG require Remedy Change Management be installed.
1103	Invalid Broadcast Originated From; BMC Remedy Problem Management is not available	The Broadcast Originated From value is not valid. Select a value that does not require Remedy Problem Management to be installed. For example, numbers prefixed by PBM require Remedy Problem Management be installed.
1104	Invalid Broadcast Originated From ID; either ID does not exist or Originated From record has error	The broadcast originated from ID value does not exist or the originated from record is not correct. Correct either the broadcast originated from ID or the originated from record.
1105	Invalid Form; BMC Remedy Incident Management is not available	The form is not valid. Use the appropriate form.
1106	Invalid Form; BMC Remedy Change Management is not available	The form is not valid. Use the appropriate form.
1107	Invalid Form; BMC Remedy Problem Management is not available	The form is not valid. Use the appropriate form.
1108	Invalid Link to Request ID	The link to request ID value is not valid. Select the appropriate value.
1109	Invalid Cost Category; BMC Remedy Incident Management is not available	The broadcast originated from value entered in the Cost Category column on the FIN-Costs tab of the `Transactional-SharedComponents.xls` spreadsheet requires Remedy Incident Management be installed and it is not. Enter a value that corresponds with a component you have installed. F or example, enter a value other than Incident.
1110	Invalid Cost Category; BMC Remedy Change Management is not available	The broadcast originated from value entered in the Cost Category column on the FIN-Costs tab of the `Transactional-SharedComponents.xls` spreadsheet requires Remedy Change Management be installed and it is not. Enter a value that corresponds with a component you have installed. For example, enter a value other than Infrastructure Change.

Code	Message	Explanation
1111	Invalid Cost Category; BMC Remedy Problem Management is not available	The broadcast originated from value entered in the Cost Category column on the FIN-Costs tab of the `Transactional-SharedComponents.xls` spreadsheet requires Remedy Incident Management be installed and it is not. Enter a value that corresponds with a component you have installed. For example, enter a value other than Problem Investigation.
1112	Invalid Cost Category; Cost Category has to be Incident, Infrastructure Change, Problem Investigation, Solution, or Known Error	The cost category value is not valid. Assign it a value of either Incident, Infrastructure Change, Problem Investigation, Solution, or Known Error.
1113	Invalid Requested By Support Company	The requested by support company value is not valid. Select the appropriate value.
1114	No Default Group was found for the Change Manager or Change Manager Login	Change either the change manager or the change manager login to one that has an associated default group.
1115	No Default Group was found for the Change Implementer or Change Implementer Login	Change either the change implementer or the change implementer login to one that has an associated default group.
1116	More than one Change Manager Coordinator was found with the same name. Try using the Change Manager Login or the Manager Support Company, Manager Support Organization and Manager Support Group Name to narrow the search	There are duplicate change manager coordinators with the same name. To narrow the search, enter search criteria in the Change Manager Login, Change Manager Support Company, Manager Support Organization, Manager Support Group Name, or any combination of these fields.
1117	More than one Change Implementer was found with the same name. Try using the Change Implementer Login or the Implementer Support Company, Implementer Support Organization and Implementer Support Group Name to narrow the search	There are change implementers with the same name. To narrow the search, enter search criteria in the Change Implementer Login, Implementer Support Company, Implementer Support Organization, Implementer Support Group, or any combination of these fields.
1118	Invalid Implementer	The implementer value is not valid. Select the appropriate value.
1119	More than one Change Manager was found for the specified Manager Support Company, Manager Support Organization and Manager Support Group Name with the same name	There are duplicate change managers for the specified manager support company, manager support organization, or manager support group name with the same name. Remove any duplicates.

Code	Message	Explanation
1120	More than one Change Implementer was found for the specified Implementer Support Company, Implementer Support Organization and Implementer Support Group Name with the same name	There are duplicate change implementers for the specified implementer support company, implementer support organization, or implementer support group name with the same name. Remove any duplicates.
1121	Invalid Change Manager Login	The change manager login value is not valid. Select the appropriate value.
1122	Invalid Change Implementer Login	The change implementer login value is not valid. Select the appropriate value.
1123	Invalid End Time; End Time must be greater than Activate Time	Either change the end time or the activate time so that the activate time precedes the end time.
1124	Invalid Manager Support Company	The manager support company value is not valid. Select the appropriate value.
1125	Invalid Manager Support Organization	The manager support organization value is not valid. Select the appropriate value.
1126	Invalid Manager Support Group	The manager support group value is not valid. Select the appropriate value.
1127	More than one People record matches Requested By Support Company, First Name, Middle Name and Last Name	There are duplicate records in `People.xls` with the same Requested By Support Company, First Name, Middle Name, or Last Name. Remove the duplicates.
1128	More than one People record matches Requested For First Name and Last Name	There are duplicate records in `People.xls` with the same Requested For First Name or Last Name. Remove the duplicates.
1129	The Requested By First Name and Last Name, or Person ID specified does not have a Login ID. When the Create Request flag is set to Yes, the Customer must have a Login ID	Either assign a login ID to the Requested By First Name, Last Name, or Person ID you specified, or assign the Create Request flag a value of No.
1130	Invalid Requested By Support Group combination (Company is required when Organization is present, and Organization is required when Group is entered)	The requested by support group combination is not valid. Supply missing values, such as company (if organization is present) and organization (if group is present).
1131	Invalid Scheduled Start Date; Scheduled Start Date comes before the Required Start Date	Change either the scheduled start date or the required start date so that the scheduled start date precedes the required start date.
1132	Invalid Requested End Date; Requested End Date must be greater than Requested Start Date	Change either the requested end date or the requested start date so that the requested start date precedes the requested start date.

Code	Message	Explanation
1133	Invalid Scheduled End Date; Scheduled End Date must be greater than Scheduled Start Date	Change either the scheduled end date or the scheduled start date so that the scheduled start date precedes the scheduled start date.
1134	Invalid Actual End Date; Actual End Date must be greater than Actual Start Date	Change either the actual end date or the actual start date so that the actual start date precedes the actual start date.
1135	Invalid Login ID in the Individual Approver field	The login ID value specified in the Individual Approver field is not valid. Select the appropriate value.
1136	Only the Individual Approver field or Group Approver fields can be populated	Values exist in fields other than the Individual Approver or Group Approver. Clear the other fields of their values.
1137	For Group Approvers, the Support Company, Support Organization and Support Group fields are required	Either no support company, support organization, or support group or a combination of these was specified for the group approver. Specify the missing values.
1138	Invalid Task Group Template ID	The task group template ID value is not valid. Select the appropriate value
1139	There are no members in the specified Support Group that have the functional role of Infrastructure Change Approver	Replace the specified support group with one that has members assigned to the support group functional role.
1140	Invalid Ticket Request ID	The ticket request ID value specified is not valid. Select the appropriate value.
1141	Invalid Process	The process value specified is not valid. Select the appropriate value.
1142	Invalid Change Request Status	Select a valid change request status.
1143	Invalid Task Group Identifier. Either Task Group does not exist or Request ID and Request Form Name do not match the Task being loaded.	The task group identifier value specified is not valid. Either specify a task group that exists or specify a Request ID and Request Form Name that match the task being loaded.
1144	The Level specified is greater than the Max Approval Level for the Process	Either specify a Level that is less than the Max Approval Level for the Process or change the Max Approval Level that is less than the Level.
1145	Invalid Breach Reason	The breach reason value is not valid. Select the appropriate value.
1146	Invalid Breach Exception	The breach exception value is not valid. Select the appropriate value.
1147	Invalid Scheduled Start Date; Schedule Start Date comes before the Earliest Start Date	Change either the scheduled start date or the earliest start date so that the scheduled start date precedes the earliest start date.
1148	The Level must be greater than 0	Change the value specified for level so that is greater than zero.

Code	Message	Explanation
1149	The parent record must be in an active approval state for the Approval Status to be Pending	Assign active approval status to parent record.
1150	The parent record must be in an active approval state if the process specified is the current process	Change the parent record to the active approval state.
1151	The parent record must be Rejected if the Approver Status is Rejected	Assign rejected status to parent record.
1152	If the approval status is set to Rejected all other approval signatures for the same parent record and process must be set to Closed	Change all of the approval signature records to closed for that change record.
1153	Change Manager or Change Manager Login do not have Change Manager functional role	Either assign the Change Manager functional role to the Change Manager or Change Manager Login being specified, or specify a Change Manager or Change Manager Login that has Change Manager functional role assigned.
1163	Invalid License Type	The license type value specified is not valid. Select the appropriate value.
1164	Support Group must exist as a valid Support Group on CTM:LoadSupportGroupAssociation for the specified Login ID	Either replace the login ID specified or the support group to match on that exists on CTM:LoadSupportGroupAssociation.
1165	Invalid Template Identifier for the Template Type selected or Template is not Active	Select a valid template identifier for the template type selected, or apply the Active attribute to the template.
1166	Predecessor and Successor with the same Instance ID is not permitted	Either change the instance ID of the predecessor or change the instance ID of the successor.
1167	Proposed flow is not permitted as it would cause a loop	A flow have been previously defined that would make this flow recursive. For example, if you previously defined a flow from A to B, you cannot now define a flow from B to A.
1168	Successor cannot be set to 'Start'	Only predecessors can be set to Start.
1169	Invalid Successor	The successor value specified is not valid. Select the appropriate value.
1170	Invalid Predecessor	The predecessor value specified is not valid. Select the appropriate value.
1171	Invalid Flow; Predecessor and Successor Associations must belong to the same Parent	Correct the flow to use predecessors and successors that belong to the same parent.

Code	Message	Explanation
1172	Parent of Association Template must be set to Type of 'Standard' and Status 'Active'	Set the association template's parent type to Standard and its status to Active.
1173	Invalid Association (Reverse Association exists on Staging form)	Either discard the current association or correct the reverse association on the staging form.
1174	Invalid Association (Reverse Association exists on Target form)	Either discard the current association or correct the reverse association on the target form.
1175	Invalid Association (Template Identifier and Task Group Template Identifier should have same company or Template Identifier Company should be '- Global -')	Either use the same company in the template identifier and task group template identifier, or use - Global - as the template identifier company.
1176	Invalid Automatic Command Selection	Use a valid value in the automatic command selection.
1177	Invalid Task Group Template Identifier or Template is not Active	Either use a valid task group template identifier, or set the template status to Active.
1178	Invalid Time Out Status Reason Selected	Select a valid time out status reason.
1179	Invalid Request Form Name	The requestor form name value specified is not valid. Select the appropriate value.
1180	Parent Instance ID and Child Instance ID cannot be the same	Either change the parent instance ID or the child instance ID to make them different.
1181	Invalid Parent Instance ID	The parent instance ID value specified is not valid. Select the appropriate value.
1182	Invalid Child Instance ID	The child instance ID value specified is not valid. Select the appropriate value.
1183	Invalid Relationship (CI to CI Relationship is not allowed here)	You are trying to create a relationship between CIs and that is not allowed. Change one of the CIs specified to a different type.
1184	Invalid Relationship (CI can not be Child)	The CI must be the parent in a relationship. Change the parent to make it the CI and change the child to make it something other than CI.
1185	License Expiration Date Must Be Later Than The License Effective Date	Change either the license expiration date or the license effective date so that the license effective date precedes the license expiration date.
1186	Expiration Date is in the past	Change the Expiration Date so that it is either the current date or a date later than the current date.
1187	Invalid Owner Support Company	The Owner Support Company value specified is not valid. Select the appropriate value.
1188	Invalid Notification Group	The Notification Group value specified is not valid. Select the appropriate value.

Code	Message	Explanation
1189	Invalid Parent Contract ID	The parent contract ID value specified is not valid. Select the appropriate value.
1190	Invalid Notification Contact	The Notification Contract value specified is not valid. Select the appropriate value.
1191	Invalid Change Requester	The Change Requester value specified is not valid. Select the appropriate value.
1192	Invalid Owner Group	The Owner Group value specified is not valid. Select the appropriate value.
1193	Invalid Owner Contact	The Owner Contract value specified is not valid. Select the appropriate value.
1194	Invalid Authorized Callers	The Authorized Callers value specified is not valid. Select the appropriate value.
1195	Invalid Term	The Term value specified is not valid. Select the appropriate value.
1196	Invalid Term Condition	The Term Condition value specified is not valid. Select the appropriate value.
1197	The Expiration Date must be later than the Start Date	Change either the expiration date or the start date so that the start date precedes the expiration date.
1198	The Notification Date you entered is later than the Expiration Date. Enter a Notification Date that is earlier than the Expiration Date	Change either the notification date or the expiration date so that the notification date precedes the expiration date.
1199	Invalid Parent Identifier for the Parent Type selected	Either change the parent identifier to match the type selected or change the type to match the parent identifier specified.
1200	Invalid Parent Reconciliation ID	The Parent Reconciliation ID value specified is not valid. Select the appropriate value.
1201	Invalid Child Reconciliation ID	The Child Reconciliation ID value specified is not valid. Select the appropriate value.
1202	Invalid Relationship Type	The Relationship Type value specified is not valid. Select the appropriate value.
1203	Parent Reconciliation ID and Child Reconciliation ID cannot be the same	Change either the Parent Reconciliation ID or the Child Reconciliation ID to make them different.
1204	'Change Request Prev Status' cannot be the same as 'Change Request Status' if Status is Rejected or Pending	Either change the value specified for Change Request Prev Status or Change Request Status to make them different or Change the Status to something other than Rejected or Pending.
1205	Invalid 'Change Req Prev Status Reason' for the 'Change Requested Prev Status' selected	Either change the value selected for Change Req Previous Status Reason or the value selected for Changed Requested Prev Status.

Code	Message	Explanation
1206	Invalid Supplier Name	The Supplier Name value specified is not valid. Select the appropriate value.
1207	Invalid Request Identifier - To (CI is not a Business Service CI)	The Request Identifier - To value specified is not valid. Select the appropriate value.
1208	Invalid Request Identifier - From (CI is not a Business Service CI)	The Request Identifier - From value specified is not valid. Select the appropriate value.
1209	Invalid Contract Type	Select a valid contract type and retry.
1210	The License Type associated with the permission should be 'Not Applicable'	Change the license type so it is Not Applicable.
1211	The License Type associated with the permission should be 'Read'	Change the license type so it is Read.
1212	The License Type associated with the permission should be 'Fixed'	Change the license type so it is Fixed.
1213	The License Type associated with the permission should be 'Floating'	Change the license type so it is Floating.
1214	The License Type associated with the permission should be 'Fixed or Floating'	Change the license type so it is Fixed or Floating.
1215	The License Type associated with the permission should be 'Fixed, Floating or None'	Change the license type so it is Fixed, Floating or None.
1216	Invalid Payment Code	The Payment Code value specified is not valid. Select the appropriate value.
1217	Invalid Payment Period	The Payment Period value specified is not valid. Select the appropriate value.
1218	Invalid Categorization Tier 1	The Categorization Tier 1 value specified is not valid. Select the appropriate value.
1219	Invalid Categorization Tier 2	The Categorization Tier 2 value specified is not valid. Select the appropriate value.
1220	Invalid Categorization Tier 3	The Categorization Tier 3 value specified is not valid. Select the appropriate value.
1221	'CI Type of Relationship' can be 'CI' only if 'Request Identifier Type' is 'Incident', 'Known Error' or 'Problem Investigation'	Either use a value other than CI for CI Type of Relationship or change the value specified for Request Identifier Type to one of Incident, Known Error or Problem Investigation.
1222	Invalid Service ReconID	The Service Recon ID value specified is not valid. Select the appropriate value.
1223	Invalid CI ReconID	The CI Recon ID value specified is not valid. Select the appropriate value.

Code	Message	Explanation
1224	CI Type of Relationship' can be 'Service CI' only if 'Request Identifier Type' is 'Incident', 'Infrastructure Change', 'Known Error' or 'Problem Investigation'	Either use a value other than Service CI for CI Type of Relationship or change the value specified for Request Identifier Type to one of Incident, Infrastructure Change, Known Error or Problem Investigation.
1225	Parent Relationship Type can only be "Configuration Item" or "Contract"	Change the value for Parent Relationship Type to Configuration Item or Contract.
1226	Child Relationship Type can only be "Contract" or "License Certificate"	Change the value for Child Relationship Type to Contract or License Certificate.
1227	Invalid Cost per Asset Currency	Correct the value specified for Cost per Asset Currency.
1228	Invalid Residual Value Currency	Correct the value specified for Residual Value Currency.
1229	Invalid Payment Amount Due Currency	Correct the value specified for Payment Amount Due Currency.
1230	Invalid Payment Amount Sent Currency	Correct the value specified for Payment Amount Sent Currency.
1231	Connection Ans 01 must be an integer	Either replace the value for Connection Ans 01 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1232	Connection Ans 02 must be an integer	Either replace the value for Connection Ans 02 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1233	Connection Ans 03 must be an integer	Either replace the value for Connection Ans 03 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.

Code	Message	Explanation
1234	Connection Ans 04 must be an integer	Either replace the value for Connection Ans 04 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1235	Connection Ans 05 must be an integer	Either replace the value for Connection Ans 05 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1236	Connection Ans 06 must be an integer	Either replace the value for Connection Ans 06 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1237	Connection Ans 07 must be an integer	Either replace the value for Connection Ans 07 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1238	Connection Ans 08 must be an integer	Either replace the value for Connection Ans 08 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.

Code	Message	Explanation
1239	Connection Ans 09 must be an integer	Either replace the value for Connection Ans 09 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1240	Connection Ans 10 must be an integer	Either replace the value for Connection Ans 10 with an integer or change the field type to Char on the Build Connection Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1241	Compliance Ans 01 must be an integer	Either replace the value for Compliance Ans 01 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1242	Compliance Ans 02 must be an integer	Either replace the value for Compliance Ans 02 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1243	Compliance Ans 03 must be an integer	Either replace the value for Compliance Ans 03 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.

Code	Message	Explanation
1244	Compliance Ans 04 must be an integer	Either replace the value for Compliance Ans 04 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1245	Compliance Ans 05 must be an integer	Either replace the value for Compliance Ans 05 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1246	Compliance Ans 06 must be an integer	Either replace the value for Compliance Ans 06 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1247	Compliance Ans 07 must be an integer	Either replace the value for Compliance Ans 07 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1248	Compliance Ans 08 must be an integer	Either replace the value for Compliance Ans 08 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.

Code	Message	Explanation
1249	Compliance Ans 09 must be an integer	Either replace the value for Compliance Ans 09 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1250	Compliance Ans 10 must be an integer	Either replace the value for Compliance Ans 10 with an integer or change the field type to Char on the Build Compliance Questions page of the Create License Type wizard. **Note:** For more information about configuring license types, see the chapter about asset management in the *BMC Remedy IT Service Management Administration Guide*.
1251	Connection Ans 01 must be blank since there is no associated question	Either remove the value for Connection Ans 01 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1252	Connection Ans 02 must be blank since there is no associated question	Either remove the value for Connection Ans 02 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1253	Connection Ans 03 must be blank since there is no associated question	Either remove the value for Connection Ans 03 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1254	Connection Ans 04 must be blank since there is no associated question	Either remove the value for Connection Ans 04 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1255	Connection Ans 05 must be blank since there is no associated question	Either remove the value for Connection Ans 05 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.

Code	Message	Explanation
1256	Connection Ans 06 must be blank since there is no associated question	Either remove the value for Connection Ans 06 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1257	Connection Ans 07 must be blank since there is no associated question	Either remove the value for Connection Ans 07 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1258	Connection Ans 08 must be blank since there is no associated question	Either remove the value for Connection Ans 08 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1259	Connection Ans 09 must be blank since there is no associated question	Either remove the value for Connection Ans 09 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1260	Connection Ans 10 must be blank since there is no associated question	Either remove the value for Connection Ans 10 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1261	Compliance Ans 01 must be blank since there is no associated question	Either remove the value for Compliance Ans 01 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1262	Compliance Ans 02 must be blank since there is no associated question	Either remove the value for Compliance Ans 02 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1263	Compliance Ans 03 must be blank since there is no associated question	Either remove the value for Compliance Ans 03 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1264	Compliance Ans 04 must be blank since there is no associated question	Either remove the value for Compliance Ans 04 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.

Code	Message	Explanation
1265	Compliance Ans 05 must be blank since there is no associated question	Either remove the value for Compliance Ans 05 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1266	Compliance Ans 06 must be blank since there is no associated question	Either remove the value for Compliance Ans 06 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1267	Compliance Ans 07 must be blank since there is no associated question	Either remove the value for Compliance Ans 07 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1268	Compliance Ans 08 must be blank since there is no associated question	Either remove the value for Compliance Ans 08 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1269	Compliance Ans 09 must be blank since there is no associated question	Either remove the value for Compliance Ans 09 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1270	Compliance Ans 10 must be blank since there is no associated question	Either remove the value for Compliance Ans 10 or configure a question using the License Type Wizard as described in the asset management chapter of the *BMC Remedy IT Service Management Administration Guide*.
1271	Termination conditions, Expiration Date and Notification Date should be blank when Term is Never ending	Either remove the values specified for Termination conditions, Expiration Date, and Notification Date fields, or change the value of Term to something other than Never ending.
1272	The Master Certificate Identifier must be blank if Certificate Group Status is "No Group" or "Master Certificate"	Either remove the value specified for Master Certificate Identifier or change the value specified for Certificate Group Status to something other than No Group or Master Certificate.
1273	The Master Certificate Identifier specified either does not exist or does not have an identical Product Tier, License Type and Contract for this license certificate	Either use a different master certificate identifier or choose another license certificate.
1274	The License Type specified does not exist	Specify a license type that exists.

Code	Message	Explanation
1275	Certificate Group Status can be "Attached to Group" or "Master Certificate" only if Groupable is set to Yes" for the corresponding License Type	Either change the value specified for the Certificate Group Status to something other than Attached to Group or Master Certificate or set Groupable to Yes for the license type.
1276	The Change Request Previous Status cannot be "Rejected" if Change Request Status is "Pending". A "Rejected" change request can have a status of "Restart" but not "Pending"	Either change the value of Change Request Previous Status to something other than Rejected or change the Change Request Status to Restart.
1277	Requester Company must be a valid company in COM:Company form with a type of either Operating Company, Customer or Vendor	The Requester Company must exist on COM:Company with a type of either Operating Company, Customer, or Vendor. Select the appropriate value.
1278	Requested For Company must be a valid company in COM:Company form with a type of either Operating Company or Customer	The Requested Company must exist on COM:Company with a type of either Operating Company, Customer. Select the appropriate value.
1279	Assignee Company must be a valid company in the COM:Company form	The Assignee Company must exist on COM:Company. Select the appropriate value.
1280	Invalid Vendor Person ID	The Vendor Person ID must match a Person ID in the CTM:People form. Select the appropriate value.
1281	The Corporate ID and Company specified does not exist on People form	The Corporate ID and Company must match both the Corporate ID and Company in the CTM:People form. Select the appropriate value.
1282	There is no Login ID associated to the Corporate ID and Company specified	The Login ID is not associated to the Corporate ID and Company specified in the CTM:People form. Select the appropriate value.
1283	The Login ID associated to the Corporate ID and Company does not exist on User form	The Login ID associated to the Corporate ID and Company must exist in the User form. Select the appropriate value.
1284	The Template Name does not exist on CTM:LoadPeopleTemplate, or the template is not promoted	The Template Name must exist on CTM:LoadPeopleTemplate, or the template must be promoted. Select the appropriate value.
1285	Invalid Change Coordinator	The Change Coordinator specified must exist in CTM:People form with a functional role of Infrastructure Change Coordinator.
1286	Product Type cannot be found using the CI Type specified	The CI Type is invalid. Select the appropriate value.
1287	There must be a default support group specified for the template	Specify a default support group for the template.
1290	Invalid Certificate Name. There is no matching License Certificate.	The Certificate Name must exist in either AST:LoadLicenseCertificates or AST:LicenseCertificates.

Code	Message	Explanation
1291	Invalid categorization doesn't exist in the PDL:ProductDictionary	The Product Categorization must exist in PDL:ProductDictionary. Select the appropriate value.
1292	Invalid CI Name	The CI Name is invalid. Select the appropriate value.
1293	Invalid Asset Reconciliation Identity	The Asset Reconciliation Identity is invalid. Select the appropriate value.
1294	Invalid Relationship Type - People	The Relationship Type is invalid for Asset People relationship. Select the appropriate value.
1295	Invalid Relationship Type - Organization	The Relationship Type is invalid for Asset People Organization relationship.
1296	Invalid Relationship Type - Support Group	The Relationship Type is invalid for Asset People Support Group relationship. Select the appropriate value.
1297	Invalid Relationship Type - Support Group - Multiple Group	The Relationship Type is invalid for Asset People multiple Support Group relationship. Select the appropriate value.
1298	Invalid Request Type	The Request Type is invalid. Select the appropriate value.
1299	Invalid Relationship Level	The Relationship Level is invalid. Select the appropriate value.
1300	Invalid People Organization structure	The People Organization structure must exist in the CTM:People Organization form. Select the appropriate value.

Errors for required fields

The Error codes from missing required fields table lists error codes from missing required fields.

Table 39: Error codes from missing required fields

Code	Message	Explanation
200	Missing Required Fields For Access ID	Specify values for the Access ID's required fields.
201	Missing Required Fields For It Skills	When IT Skills is selected, Operational Category Tier 1 and Product Category Tier 1 are required.
202	Missing Home Fields	Home fields are required when client type is set to Home-based.
203	Paging Times Is Required	Specify paging times values.

Code	Message	Explanation
204	Time Zone Is Required	Specify a time zone.
205	The Open Times field and Close Times field must either both have values or both be empty	Either specify values or clear the values for both the Open Time and Close Times fields.
206	Pager Service Provider Is Required When On-Call Paging Type Is Generic	Either specify a pager service provider value or assign On-Call Paging Type a value other than Generic.
207	Pager Parameters Email Is Required For The Selected Pager Service Provider	Either specify a pager parameters email value or select a pager service provider that does not require a pager parameters email.
208	Pager Parameters Pin Is Required For The Selected Pager Service Provider	Either specify a pager parameters pin value or select a pager service provider that does not require a pager parameters pin.
209	Pager Parameters Phone Is Required For The Selected Pager Service Provider	Either specify a pager parameters phone number value or select a pager service provider that does not require a pager parameters phone number.
210	Pager Parameters Pin And Phone Is Required For The Selected Pager Service Provider	Either specify a pager parameters pin or a pager parameters phone value or select a pager service provider that does not require a pager parameters pin or pager parameters phone.
211	Operational Category Tier 1 and 2 are required fields when Operational Category Tier 3 is entered	Either select values for operational category tier 1 and tier 2, or clear the value selected for operational category tier 3.
212	At least one sub-category is required when Incident Management is selected	Specify at least one subcategory.
213	Change Management selected; at least one sub category is required	Specify at least one subcategory.
214	Source Cost Center And Distribution Percentage Are Required	Specify values for Source Cost Center and Distribution Percentage.
215	Person ID Is Required	Specify a value for Person ID.
216	Source Cost Center Is Required	Specify a value for Source Cost Center.
217	Both the Product Name and Manufacturer are required when defining a Product within Product Catalog	Specify values for both product name and manufacturer.
218	Login ID is required when On-Call paging type is set to Individual	Either specify a value for Login ID or set the On-Call Paging Type to a value other than Individual.
219	Site Required when the Client Type is Office-Based Employee, Field-Based Employee or Contractor	Either specify a value for Site or specify a value for Client Type other than Office-Based Employee, Field-Based Employee, or Contractor.

Code	Message	Explanation
220	Missing Required Fields for Wallet attribute	When Wallet Attribute is selected, Category and Type are required.
221	Generic Category Tier 1 and 2 are required fields when Generic Category Tier 3 is entered	Either select values for generic category tier 1 and tier 2, or clear the value selected for generic category tier 3.
222	Manufacturer is required when specifying Product Name	Either specify a value for Manufacturer or clear any value specified for Product Name.
223	Product Name required with specifying Manufacturer	Either specify a value for Product Name or clear any value specified for Manufacturer.
224	Product Tier 1 through 3, Manufacturer, and Product Name fields are required when Model Version is entered	Either specify values for Product Tier 1 through 3, Manufacturer, or Product Name, or clear any value specified for Model Version.
225	Product Tier 1 through 3 are required when either Product Name or Manufacturer is entered	Either specify values for Product Tier 1 through 3, or clear any value specified for Product Name and Manufacturer.
226	Product Tier 1 is required when Product Tier 2 or 3 is entered	Either specify values for Product Tier 1, or clear any values specified for Product Tier 2 and Product Tier 3.
227	Product Tier 1 and 2 are required fields when Product Category Tier 3 is entered	Either specify values for Product Tier 1 and 2, or clear any value specified for Product Category Tier 3.
228	Operational Category Tier 1 is a required field when either Operational Category 2 or 3 is entered	Either specify a value for Operational Category Tier 1 or clear any values specified for Operation Category 2 and Operational Category 3.
229	Company Menu Structure Tier 1 is required when Menu Structure Tier 2 is entered	Either specify a value for Company Menu Structure Tier 1 or clear any value specified for Menu Structure Tier 2.
230	Company Menu Structure Tier 1 and Tier 2 are required when Menu Structure Tier 3 is entered	Either specify a value for Company Menu Structure Tier 1 or clear any value specified for Menu Structure Tier 3.
231	Organization is required when specifying Department	Either specify a value for Organization or clear any values specified for Department.
232	User Service Restoration, User Service Request, Infrastructure Restoration or Infrastructure Event is required when Incident Management flag is selected	Either specify values for User Service Restoration, Service Request, Infrastructure Restoration, and Infrastructure Event, or deselect the Incident Management flag.
233	Organization and Department must be blank when specifying Global Contact Company	Either clear the values specified for Organization and Department or clear the value specified for Global Contact Company.
234	Region, Site Group and Site must be blank when specifying Global Company	Either clear the values specified for Region, Site Group, and Site, or clear the value specified for Global Company.

Code	Message	Explanation
235	The License Type, Full Text License Type and Default Notification Mechanism is required when specifying Login ID	Either clear the values specified for License Type, Full Text License Type and Default Notification Mechanism or clear the value specified for Login ID.
236	The Login ID is required when the Support Staff flag is set to Yes	Either specify a value for Login ID or set the Support Staff flag to No.
237	The Currency is required when specifying the Hourly Rate Value	Either specify a value for Currency or clear any value specified for Hourly Rate Value.
238	Support Company, Support Organization and Support Group fields must be left blank when the Approval For field is set to Individual	Either clear the values specified for Support Company, Support Organization, and Support Group, or set the Approval For field to a value other than Individual.
239	First Name, Last Name and Approver Login ID field must be left blank when the Approval For field is set to Group	Either clear the values specified for First Name, Last name, and Approver login ID, or set the Approval For field to a value other than Group.
240	First Name, Last Name and Approver Login ID fields are required when the Approval For field is set to Individual	Either clear the values specified for First Name, Last Name, and Approver login ID, or set the Approval For field to a value other than Individual.
241	Support Company, Support Organization and Support Group are all required when the Approval For field is set to Group	Either clear the values specified for Support Company, Support Organization, and Support Group, or set the Approval For field to a value other than Group.
242	CI Type is required and CI Name must be blank when Select On field is set to CI Type	Either specify a value for CI Type as well as clearing the value from CI Name or specify a value other than CI Type for the Select On field.
243	CI Name and Reconciliation Identity are required. CI Type and All Product Categorization Tiers must be blank when the Select On field is set to CI Name	Specify a value for both CI Name and Reconciliation Identity; either clear the values from CI Type and All Product Categorization Tiers or set the Select On field to a value other than CI Name.
244	All Product Categorization Tiers need to be blank when CI Name is entered	Either clear the values from All Product Categorization Tiers or clear the value specified for CI Name.
245	Process field is required when the Covering field is set to Specific Process	Either specify a value for Process or specify a value other than Specific Process in the Covering field.
246	Process field should be Left blank when the Covering field is set to All	Either specify a value for Process or specify a value other than All in the Covering field.
247	'Time Management Type', Year and 'Status Reason' fields are required when the 'Attribute Type' is set to 'HR Time Management'	Either enter values for Time Management Type, Year, and Status Reason, or set HR Time Management to a value other than Attribute Type.
248	Support Company, Support Organization and Assigned Group are required when Event field is "Script"	Either specify values for Support Company, Support Organization, and Assigned Group, or set Event to value other than Script.

Code	Message	Explanation
249	Resolution Product Tier 1 is required when Resolution Product Tier 2 or 3 is entered	Either specify a value for Resolution Product Tier 1 or clear any values specified for Resolution Product Tier 2 and Resolution Product Tier 3.
250	Resolution Product Tier 1 and 2 are required fields when Resolution Product Category Tier 3 is entered	Either specify a value for Resolution Product Tier 1 and Resolution Product Tier 2 or clear any values specified for Resolution Product Tier 3.
251	Resolution Product Tier 1 through 3 are required when either Resolution Product Name or Manufacturer is entered	Either specify a value for Resolution Product Tier 1 through Resolution Product Tier 3 or clear any values specified for Resolution Product Name and Manager.
252	Resolution Product Tier 1 through 3, Resolution Manufacturer, and Resolution Product Name fields are required when Resolution Model Version is entered	Either specify a value for Resolution Product Tier 1 through Resolution Product Tier 3 and Resolution Product Name or clear any values specified for Resolution Model Version.
253	Incident Template ID or Template Name are required when Incident Action Type is Template	Either specify values for Incident Template Id and Incident Template Name or set Action Type to a value other than Template.
254	Operational Category Tier 1 or Product Category Tier 1 are required when Incident Action Type is Categorization	Either specify values for Operational Category Tier 1 and Product Category Tier 1 or set Incident Action Type to a value other than Categorization.
255	Summary or Notes are required when Incident Action Type is Summary/Notes	Either specify a value for Summary or Note or set the Incident Action Type to a value other than Summary/Notes.
256	Script Description is required when Incident Action Type is Script	Either specify a value for Script Description or set Incident Action Type to a value other that Script.
257	Solution Database ID is required when Incident Action Type is Solution	Either specify a value for Solution Database ID or set Incident Action Type to a value other than Solution.
258	Known Error ID is required when Incident Action Type is "Known Error"	Either specify a value for Known Error ID or set Incident Action Type to a value other than Known Error.
259	Decision Tree Main Branch ID or Decision Tree Previous Branch ID fields are required when this branch is not a main branch	Either specify values for Decision Tree Main Branch ID and Decision Tree Previous Branch ID columns in the `ProcessSetup-Incident.xls` spreadsheet or move the values from the CFG-DecisionTree-Branch tab to the CFG-DecisionTree-MainBranch tab.
260	When the Customer Person ID is not populated, the Customer's Company, First Name and Last Name are required	Either specify values for Customer's Company, First Name, and Last Name, or specify a value for Customer Person ID.
261	When the Contact Person ID is not populated, the Contact's Company, First Name and Last Name are required	Either specify values for Contact's Company, First Name, and Last Name, or specify a value for Contact Person ID.

Code	Message	Explanation
262	The Resolution or Resolution Categorization Tier 1 field is required when the status is either Resolved or Closed and the Service Type is User Service Restoration or Infrastructure Restoration	Either specify values for the Resolution and Resolution Categorization Tier 1 fields, or set Status to a value other than Resolved or Closed or set Service Type to a value other than User Service Restoration or Infrastructure Restoration.
263	The Status Reason field requires a value when the Status is either Pending or Resolved	Either specify a value for Status Reason or set Status to a value other than Pending or Resolved.
264	The Last Resolved Date is required when the Status is either Resolved or Closed	Either specify a value for Last Resolved Date or set Status to value other than Resolved or Closed.
265	The Closed Date is required when the Status is Closed	Either specify a value for Closed Date or set Status to a value other than Closed.
266	The Assignment Group, Assignee, or Assignee Login ID field must be filled in	Specify values for either Assignment Group, Assignee, or Assignee Login ID.
267	The Owner Group, Owner, or Owner Login ID field 'must be filled in	Specify values for either Owner Group, Owner, or Owner Login ID.
268	The Reported To Vendor Date is required when a Vendor Group is selected for assignment	Either specify a Reported To Vendor Date or clear any Vendor Group specified for assignment.
269	All Recipient Group Fields are required when Notify is set to Group	Either specify values for all of the recipient group fields or set Notify to a value other than Group.
270	Recipient Person ID or Recipient field is required when Notify is set to Individual	Either specify values for the Recipient Person ID or Recipient fields or set Notify to a value other than Individual.
271	Either the Person ID or the combination of Company, First Name, and Last Name is required for the customer	Either specify a value for Person ID or change the values specified for Company, First Name, and Last Name to make them a valid combination.
272	When the Requester Person ID is not populated, the Requester Company, First Name, and Last Name are required	Either specify a value for Requestor Person ID, or specify values for Requester Company, First Name, and Last Name.
273	If any of the following fields are populated, all are required -- Company, Support Group, Organization, Support Group Name	Either specify values in all or none of the following fields: ■ Company ■ Support Group ■ Organization ■ Support Group Name

Code	Message	Explanation
274	When the Requested For Person ID is not populated, the Requested For Company, First Name, and Last Name are required	Either specify a value for Requested For Person ID, or specify values for Requested For Company, First Name, and Last Name.
275	Either the Impact, Urgency or Priority is required	Specify values for Impact, Urgency, and Priority.
276	When the Customer Person ID is not populated, the Customer Company, Customer First Name, and Customer Last Name are required	Either specify a value for Customer Person ID, or specify values for Customer Company, Customer First Name, and Customer Last Name.
277	If any of the following fields are populated, all are required --All Assignee Company, Assignee Organization, Assignee Group Name	Either specify values in all or none of the following fields: ■ All Assignee Company ■ Assignee Organization ■ Assignee Group Name
278	The Problem Coordinator Assignment Group, Problem Coordinator Assignee or Problem Coordinator Assignee Login must be filled in	Specify a value for Problem Coordinator Assignment Group, Problem Coordinator Assignee, or Problem Coordinator Assignee Login.
279	The Status Reason field requires a value when the Status is either Completed or Cancelled	Either specify a value for Status Reason or set the value of Status to something other than Completed or Cancelled.
280	At least one of the three product categorizations or the product name is required when the problem investigation status is "Completed"	Either specify a value for one of the product categorizations or the product name or set the problem investigation status to a value other than Completed.
281	When the Requester Person ID is not populated, the Requester's Company, First Name and Last Name are required	Either specify a value for Requester Person ID, or specify values for Requestor's Company, First Name, and Last Name.
282	The Problem Coordinator Assignee or Problem Coordinator Assignee Login is required when status is "Assigned" or "Under Investigation"	Either specify values for Problem Coordinator Assignee or Problem Coordinator Assignee Login or set the status to a value other than Assigned or Under Investigation.
283	The Assignee Assigned Group and Problem Assignee or Assignee Login ID are required when status is "Under Investigation" or "Completed" or "Closed"	Either specify values for Assignee Assigned Group and Problem Assignee or Assignee Login ID fields, or set the status to a value other than Under Investigation, Completed, or Closed.

Code	Message	Explanation
284	The Assignee Assigned Group (or Problem Assignee or Assignee Login ID) is required when the status is set to "Assigned" or "Closed"	Either specify values for Assignee Assigned Group or Problem Assignee and Assignee Login ID, or set the status to a value other than Assigned or Closed.
285	Vendor name and contact are required when the problem investigation is assigned to a vendor	Either specify values for vendor name and contact or unassign the problem investigation.
286	Either the Requested By Person ID or the combination of Requested By Support Company, First Name and Last Name is required	Either specify values for Requested By Person ID or specify values that make the combination of Requested By Support Company, First Name, and Last Name valid.
287	Either the Requested For Person ID or the combination of Requested For First Name and Last Name is required	Either specify values for Requested For Person ID or specify values that make the combination of Requested For First Name and Last Name valid.
288	When the Requested By Person ID is not populated, the Requested By Support Company, First Name and Last Name are required	Either specify a value for Requested By Person ID or specify values for Requested By Support Company, First Name, and Last Name.
289	When the Requested For Person ID is not populated, the Requested For First Name and Last Name are required	Either specify a value for Requested For Person ID or specify values for Requested For First Name and Last Name.
290	The Completed Date is required when the Status is either Completed or Closed	Either specify a value for Completed Date or set the status to a value other than Completed or Closed.
291	Level is required when the Process used is of type Parent-Child	Either specify a value for Level or specify a value other than Parent-Child for Process.
292	Individual Approver is required when the Process used is of type Parent-Child	Either specify a value for Individual Approver or specify a value other than Parent-Child for Process.
293	The Organization Company and Location Company must be the same	Specify the same value for both Organization Company and Location Company.
294	The Change Manager Support Group, Change Manager or Change Manager Login must be filled in	Specify values for Change Manager Support Group, Change Manager, or Change Manager Login.
295	Link to Request ID and Form field is required	Specify values for Request ID and Form.
296	The Change Request Previous Status is required when Change Request Status is "Pending" or "Rejected"	Either specify a value for Change Request Previous Status or set the Change Request Status to a value other than Pending or Rejected.
297	The Change Request Previous Status Reason is required when Change Request Previous Status is "Pending"	Either specify a value for Change Request Previous Reason or set the Change Request Previous Status to a value other than Pending.
298	The Timing Reason is required when Timing is "Expedited"	Either select a timing reason or change the timing to a value other than Expedited.

Code	Message	Explanation
299	The Internet E-Mail is required when Default Notify Mechanism is E-mail	Either enter an email address or change the Default Notify Mechanism to a value other than E-mail.
2000	The Scheduled Start Date and Scheduled End Date are required when the Change Requested Status is past the Planning In Progress state	Either add a scheduled start and end date or set the Change Requested Status to Planning In Progress or a status prior to this.
2001	The Actual Start Date, Actual End Date, and Performance Rating are required when Change Request Status is Completed or Closed	Either supply an Actual Start Date, Actual End Date, and Performance Rating, or set the Change Request Status to a value other than Completed or Closed.
2002	Owner or Owner Group are required when Notification Date is set	Either specify an Owner or Owner Group or clear the Notification Date field.
2003	The Term conditions field requires an entry for Rolling Contract	Specify Term conditions in the Rolling Contract field.
2004	The Change Request Previous Status is required when Change Request Previous Status Reason is filled in	Either select a value for Change Request Previous Status or clear the value selected for Change Request Previous Status Reason.
2005	License Type, Full Text License Type and Default Notify Mechanism are required when Support Staff is "Yes"	Either complete all the required fields or set Support Staff to No.
2006	Contract Type is required	Populate the Contract Type field.
2007	Change Requester is required if End of Lease is defined	Either populate the Change Requester field or remove End of Lease from the definition.
2008	Cost Center is required	Enter a cost center.
2009	Expiration Date is required when specifying a Fixed or Rolling Contract term	Enter a value for Fixed Contract or Rolling Contract term.
2010	Notification Date is required when specifying a Fixed Contract term	Enter a value for Fixed Contract term.
2011	The Expiration Date is required	Enter a value for Expiration Date.
2012	The Notification Date is required	Enter a value for Notification Date.
2013	Support Company, Support Organization and Notification Group are all required	Enter values for Support Company, Support Organization, and Notification Group.
2014	Connection Answer 01 is required	Either enter a value for Connection Answer 01 or use a different license type.
2015	Connection Answer 02 is required	Either enter a value for Connection Answer 02 or use a different license type.
2016	Connection Answer 03 is required	Either enter a value for Connection Answer 03 or use a different license type.

Code	Message	Explanation
2017	Connection Answer 04 is required	Either enter a value for Connection Answer 04 or use a different license type.
2018	Connection Answer 05 is required	Either enter a value for Connection Answer 05 or use a different license type.
2019	Connection Answer 06 is required	Either enter a value for Connection Answer 06 or use a different license type.
2020	Connection Answer 07 is required	Either enter a value for Connection Answer 07 or use a different license type.
2021	Connection Answer 08 is required	Either enter a value for Connection Answer 08 or use a different license type.
2022	Connection Answer 09 is required	Either enter a value for Connection Answer 09 or use a different license type.
2023	Connection Answer 10 is required	Either enter a value for Connection Answer 10 or use a different license type.
2024	Compliance Answer 01 is required	Either enter a value for Compliance Answer 01 or use a different license type.
2025	Compliance Answer 02 is required	Either enter a value for Compliance Answer 02 or use a different license type.
2026	Compliance Answer 03 is required	Either enter a value for Compliance Answer 03 or use a different license type.
2027	Compliance Answer 04 is required	Either enter a value for Compliance Answer 04 or use a different license type.
2028	Compliance Answer 05 is required	Either enter a value for Compliance Answer 05 or use a different license type.
2029	Compliance Answer 06 is required	Either enter a value for Compliance Answer 06 or use a different license type.
2030	Compliance Answer 07 is required	Either enter a value for Compliance Answer 07 or use a different license type.
2031	Compliance Answer 08 is required	Either enter a value for Compliance Answer 08 or use a different license type.
2032	Compliance Answer 09 is required	Either enter a value for Compliance Answer 09 or use a different license type.
2033	Compliance Answer 10 is required	Either enter a value for Compliance Answer 10 or use a different license type.
2034	A Master Certificate Identifier is required when Certificate Group Status is "Attached To Group"	Either specify a master certificate identifier or specify a value other than Attached to Group for Certificate Group Status.
2035	License Type is required	Enter a value for license type.

Code	Message	Explanation
2036	Target Date is required when Status is not at Draft stage	Either specify a value for the Target Date, or set the Status to Draft.
2037	Site field is required on template	Specify a value for Site.
2038	Client Type is required on template	Specify a value for Client Type.
2039	Company is required on template	Specify a value for Company.
2040	Login ID is required when request type is People	Either specify a value for Login ID, or set the value of the request type to a value other than People.
2041	Relationship Level, Contact Company, Organization, and Department are required when request type is People Organization	Either specify values for Relationship Level, Contact Company, Organization, and Department, or set the value of the request type to a value other than People Organization.
2042	Contact Company, Support Organization, and Support Group Name are required when request type is Support Group	Either specify values for Contact Company, Support Organization, and Support Group Name, or set the value of the request type to a value other than Support Group.

Errors for duplicate data

The Error codes during dataload promotion table lists error codes from duplicate data.

Table 40: Error codes from duplicate data

Code	Message	Explanation
300	Duplicate Record On Staging Form	Either delete the duplicate record from the staging form or modify the data in the record to make it unique.
301	Duplicate Record On Target Form	Either delete the duplicate record from the target form or modify the data in the record to make it unique.
304	Navigation Tiers for Company are not unique	Modify the company navigation tiers to make them unique.
305	Login ID exists on the staging form	Either delete the duplicate Login ID from the staging form or modify it to make it unique.
306	Login ID exists on the User Form	Either delete the duplicate Login ID from the user form or modify it to make it unique.
307	An entry with this product categorization and a blank product name already exists on target form	Either delete the entry with the duplicate product categorization and blank product name from the target form or modify them to make them unique.

Code	Message	Explanation
308	An entry with the product name and manufacturer already exists on the target form	Either delete this entry with the duplicate product name and manufacturer from the target form or modify them to make them unique.
309	An entry with this product categorization and blank product name already exists on the staging form	Either delete the entry with the duplicate product categorization and blank product name from the staging form or modify them to make them unique.
310	An entry with the product name and manufacturer already exists on the staging form	Either delete the entry with the duplicate product name and manufacturer from the staging form or modify them to make them unique.
311	Invalid product alias because a duplicate alias will be created from the Product Catalog staging form	Either delete the duplicate alias from the Product Catalog staging form or modify it to make it unique.
312	Duplicate Site Alias from Site staging form	Either delete the Duplicate Site Alias from the Site staging form or modify it to make it unique.
313	Duplicate Support Group Alias from Support Group staging form	Delete the duplicate Support Group Alias from the staging form or modify it to make it unique.
314	Cannot create company relationship. Global relationship will be created from the PCT:LoadProductCatalog staging form	An association for this product categorization was created for all companies (Global) through PCT:LoadProductCatalog when the Map to Global field is set to Yes for this product categorization on the PCT: LoadProductCatalog form (PCT-ProductCatalog on `ProductCatalog.xls`). Delete the record in the PCT:LoadProdComAssoc form for this product categorization.
315	Cannot create company relationship. Global relationship is already being created from the CFG:LoadGenericProdSerAssoc staging form	Modify the company relationship to make it unique.
316	Cannot create association to the specified company. Global association already exists on target form	Delete the global association from the target form and try again or create an association using a company that is unique.
317	Cannot create association to the specified company. Global association already exists on staging form	Delete the global association from the staging form and try again or create an association using a company that is unique.
318	Cannot create global company relationship. Relationship already exists with other company on target form	Delete the global company relationship with the other company from the target form and try again, or create a global company relationship using another company.
319	Cannot create global company relationship. Relationship already exists with other company on staging form	Delete the global company relationship with the other company from the staging form and try again, or create a global company relationship using another company.

Code	Message	Explanation
320	Invalid company alias because a duplicate alias will be created from Company staging form	Either delete the duplicate Company alias from the staging form, or create a company alias using a different company.
321	Cannot create company relationship. Global relationship will be created from the CFG:LoadServiceCatalog staging form	Modify the company relationship to make it unique.
322	Duplicate Company Multi-tiered menu structure already exists	The duplicate Company multi-tiered menu structure exists either in the COM:Company form or in the COM:LoadCompany staging form.
323	Alternate Login ID and For Login ID cannot be same	Change either the Alternate Login ID or the For Login ID so they are not the same.
324	Duplicate Script or Decision Tree Identifier on Staging Form	Delete the duplicate script and / or the duplicate decision tree identifier from the staging form, or modify them to make them unique.
325	Duplicate Script or Decision Tree Identifier on Target Form	Delete the duplicate script and / or the duplicate decision tree identifier from the staging form, or modify them to make them unique.
326	Duplicate Group Event Mapping Association on Staging Form	Delete the duplicate group event mapping association from the staging form, or modify it to make it unique.
327	Duplicate Group Event Mapping Association on Target Form	Delete the duplicate group event mapping association from the target form, or modify it to make it unique.
328	Duplicate Decision Tree Branch ID on Staging Form	Delete the duplicate decision branch identifier from the staging form, or modify it to make it unique.
329	Duplicate Decision Tree Branch ID on Target Form	Delete the duplicate decision branch identifier from the target form, or modify it to make it unique.
330	Cannot create association to the specified Support Group because a duplicate association would be created from Template staging form	Create any associations other than those created by the Template staging form.
331	Duplicate Record on Reverse Target Association Form	Delete the duplicate record from the reverse target association form, or modify it to make it unique.
332	Duplicate Support Group on Broadcast Staging Form	Delete the duplicate support group from the broadcast staging form, or modify it to make it unique.
333	Duplicate Solution Alias on Staging Form	Delete the duplicate solution alias from the staging form, or modify it to make it unique.
334	Duplicate Solution Alias on Target Form	Delete the duplicate solution alias from the target form, or modify it to make it unique.

Code	Message	Explanation
335	Duplicate Change Template on the Staging form	Delete the duplicate change template from the staging form, or modify it to make it unique.
336	Duplicate Change Template on the Target form	Delete the duplicate change template from the target form, or modify it to make it unique.
337	The Signature Identifier must be unique	Change the signature identifier to make it unique.
338	Duplicate impacted area for a default entry	Delete the impacted area being loaded, since it will automatically be created by the change.
339	Duplicate Permission Group exists on the Staging Form for People Template Permission Group	Delete the duplicate permission group from the staging form for the People Template Permission Group.
340	Duplicate Support Group Association exists on the Staging Form for People Template Support Group Association	Delete the duplicate support group association from the staging form for the People Template Support Group Association.
341	Duplicate Support Group Functional Role exists on the Staging Form for People Template Support Group Functional Role	Delete the duplicate support group functional role from the staging form for the People Template Support Group Functional Role.
342	Duplicate Template Identifier	Delete the duplicate template identifier.
343	Duplicate Association Identifier	Delete the duplicate association identifier.
344	Duplicate Default Group set to Yes on the Staging Form for People Support Group Association	Set only one default group to Yes on the staging form for People Support Group Association.
345	Duplicate Default Group set to Yes on the Target Form for People Support Group Association	Set only one default group to Yes on the target form for People Support Group Association.
346	Duplicate Record On Target Form with same instance ID	Either delete the duplicate record from the target form or specify a unique instance ID.
347	Duplicate Contract Identifier	Specify a unique contract identifier.
348	Duplicate Incident ID and Service ReconID exist on staging form.	Either delete the duplicate Incident ID and Service ReconID from the staging form or specify a unique Incident ID and Service ReconID.
349	Duplicate Incident ID and Service ReconID exist on HPD:Associations form.	Either delete the duplicate Incident ID and Service ReconID from the HPD:Associations form or specify a unique Incident ID and Service ReconID.
350	Duplicate Default Group set to Yes on the Staging Form for the same Template Name	On the staging form, either set a different Default Group to Yes or use a different Template Name.
351	Duplicate Default Group set to Yes on the Target Form for the same Template Name	On the target form, either set a different Default Group to Yes or use a different Template Name.

Code	Message	Explanation
352	Cannot create multiple Service or CI on staging form	Either delete the duplicate Service or CI from the staging form, or use a unique Service or CI.
353	Cannot create multiple Service or CI on target form	Either delete the duplicate Service or CI from the target form, or use a unique Service or CI.
354	Duplicate Permission Group exists on the Target Form for People Template Permission Group	Remove the duplicate permission group from the People Template Permission Group target form.
355	Duplicate Support Group Association exists on the Target Form for People Template Support Group Association	Remove the duplicate support group association from the People Template Support Group Association target form.
356	Duplicate Support Group Functional Role exists on the Target Form for People Template Support Group Functional Role	Remove the duplicate support group functional role from the People Template Support Group Functional Role target form.
357	The Corporate ID and Company specified is not unique on People form	Either delete the entry with the duplicate Corporate ID and Company on People form or modify it to make it unique.
358	The Login ID associated to the Corporate ID and Company is not unique	Either delete the duplicate record or modify it to make it unique.
359	Template Name is not unique on CTM:LoadPeopleTemplate	Either delete the duplicate Template Name from CTM:LoadPeopleTemplate or modify it to make it unique.
360	Cannot update people record when Client Type on template is Home-Based Employee	Set the value of Client Type to a value other than Home-Based Employee.
361	The relationship you are trying to create already exists on target form for the specified request type and role	Either delete the duplicate record on the target form or modify it to make it unique.
362	The relationship you are trying to create already exists on staging form for the specified request type and role	Either delete the duplicate record on the staging form or modify it to make it unique.
363	Duplicate Primary Contact set to Yes on the Target Form	Either delete the duplicate record on the target form or modify it to make it unique.
364	Duplicate Primary Contact set to Yes on the staging form	Either delete the duplicate record on the staging form or modify it to make it unique.

Errors during dataload promotion

The Error codes during dataload promotion table lists error codes that occur during dataload promotion.

Table 41: Error codes during dataload promotion

Code	Message	Explanation
400	An error was encountered during data promotion. The Short Description field of this record has been updated with the error details.	Check the Short Description field for the error message details and see step 3 in Troubleshooting validation and promotion on page 87 for troubleshooting information.

Exclusions from the BMC Remedy ITSM Data Management tool

This appendix lists areas excluded from the BMC Remedy ITSM Data Management tool.

Exclusions from dataload

The following area is excluded from bulk load data management:

Geography

The following foundation forms are excluded from bulk load:

- CFG:Geography City
- CFG:Geography Country
- CFG:Geography Stat/Province

These foundation geography forms are excluded because BMC Remedy ITSM provides extensive data for all these forms with installation of the applications. To import additional data, import the records directly into these forms using BMC Remedy Data Import. For information about using BMC Remedy Data Import, see the BMC Remedy Data Import help.

Exclusions from the data wizard

Some fields on specified forms are excluded from the data wizard for one of the following reasons:

- The field on the specified form is shorter than the field elsewhere in the application.

- The field on the form is not uniquely identified.

You can manually update any of these fields, as required. If the field is shorter than required, however, you must increase the field length.

Table 42 on page 192 lists fields not updated by the data wizard, because the field on the form is shorter than required.

Table 42: BMC Remedy IT Service Management fields not updated by the data wizard

Form or forms	Field or fields	Contains	Current length	Required length
■ BMC.AM:BMC_InventoryStorage_ ■ AST:InventoryStorage	■ Owner ■ zFullName ■ zLoginName	■ Person's full name ■ Person's full name(duplicate of Owner) ■ Login ID	■ 50 ■ 128 ■ 30	■ 128 ■ 128 ■ 254
CTM:Login ID	Created By	LoginID	40	254

Table 43 on page 192 lists fields not updated by the data wizard, because the field on the form is not uniquely identified. For example, a person's name is listed on the form, but not the Person ID or Login ID.

Table 43: Fields that are not uniquely identified

Form or forms	Fields containing
■ CHG:CCMSavedSearch-CRCI ■ CHG:CCMSavedSearch-ImpLoc ■ CHG:CCMSavedSearch-ServiceCI	Support group
■ AST:ConfigNotification ■ AST:Notifications	Product Model/Version

Form or forms	Fields containing
■ AST:Install_ASI ■ BMC.CORE:BMC_BaseElement ■ CHG:CCMSavedSearch ■ CHG:CCMSavedSearch-CRCI ■ CHG:CCMSavedSearch-ImpLoc ■ CHG:CCMSavedSearch-ServiceCI ■ CHG:CHGSLM:Qualbuilder ■ CTR:ContractBase ■ HPD:IncidentInterface_Create (Direct Contact fields) ■ PBM:ProblemInterface_Create ■ SRM:Request (AppRequestAssignee) ■ SRM:RequestInterface_Create (AppRequestAssignee) ■ TMS:Flow ■ TMS:TaskGroup ■ TMS:TaskGroupTemplate	A person's name

Data values

The spreadsheets for data migration include instructions on how to complete the spreadsheet columns. This appendix provides tables of data values where the list of values was too lengthy to display in the spreadsheet.

Configuration Item types

On the `ProductCatalog.xls` spreadsheet, the 01 PCT-ProductCatalog tab includes a column for configuration item (CI) type, which must be completed with one of the following values:

■ Account	■ File System
■ Activity	■ Floppy Drive
■ Admin Domain	■ Hardware Package
■ Application	■ Hardware System Component
■ Application Infrastructure	■ Inventory Location
■ Application Service	■ IP Connectivity Subnet
■ Application System	■ IP Endpoint
■ BIOS Element	■ IPX Connectivity Network
■ Bulk Inventory	■ Keyboard
■ Business Process	■ Local Area Network (LAN)
■ Business Service	■ LNs Collection
■ Card	■ Local File System
■ CDROM Drive	■ Logical System Component
■ Chassis	■ LPAR
■ Cluster	■ Mainframe
■ Communication Endpoint	■ Media
■ Computer System	■ Memory
■ Connectivity Collection	■ Monitor
■ Connectivity Segment	■ Network Port
■ Database	■ NT Domain
■ Database Storage	■ Operating System
■ Disk Drive	■ Package
■ Disk Partition	■ Patch
■ Document	■ Physical Location
■ Equipment	■ Pointing Device
	■ Printer
	■ Processor

■ Product ■ Protocol Endpoint ■ Rack ■ Remote File System ■ Role ■ Share ■ Software Server ■ System Resource ■ System Software	■ Tape Drive ■ UPS ■ Virtual System ■ Virtual System Enabler ■ VM Ware ■ Wide Area Network (WAN)

Locales

On the `ProcessSetup-Incident.xls` spreadsheet, the CFG-DecisionTree tab includes a column for Locale, which is a required field that must be completed with a locale code, such as en_US for English (US).

If you create decision trees in English or in any of the languages into which the application is localized, you might complete the column with any of the following locale codes:

- de_DE
- en_US
- es_ES
- fr_FR
- it_IT
- ja_JP
- ko_KR
- pt_BR

- zh_CN

  The following list contains all supported locale codes:

- en_US
- ar_AE
- ar_BH
- ar_DZ
- ar_EG
- ar_IQ
- ar_JO
- ar_KW
- ar_LB
- ar_LY
- ar_MA
- ar_OM
- ar_QA
- ar_SA
- ar_SD
- ar_SY
- ar_TN
- ar_YE
- be_BY
- bg_BG
- ca_ES
- cs_CZ
- da_DK

- de_AT
- de_CH
- de_DE
- de_LU
- el_GR
- en_AU
- en_CA
- en_GB
- en_IE
- en_IN
- en_NZ
- en_ZA
- es_AR
- es_BO
- es_CL
- es_CO
- es_CR
- es_DO
- es_EC
- es_ES
- es_GT
- es_HN
- es_MX
- es_NI
- es_PA

- es_PE
- es_PR
- es_PY
- es_SV
- es_UY
- es_VE
- et_EE
- fi_FI
- fr_BE
- fr_CA
- fr_CH
- fr_FR
- fr_LU
- hi_IN
- hr_HR
- hu_HU
- is_IS
- it_CH
- it_IT
- iw_IL
- ja_JP
- ko_KR
- lt_LT
- lv_LV
- mk_MK

- nl_BE
- nl_NL
- no_NO
- pl_PL
- pt_PT
- ro_RO
- ru_RU
- sh_YU
- sk_SK
- sl_SI
- sq_AL
- sr_YU
- sv_SE
- th_TH
- tr_TR
- uk_UA
- zh_CN
- zh_HK
- zh_TW

Notification events

On the `People.xls` spreadsheet, the 16 NTE-CFG-NotificationEvents tab includes columns for Module Name and Notification Event, both of which are required fields. This section lists the module names in BMC Remedy IT Service Management (BMC Remedy ITSM) 7.6.0x along with the applicable notification events.

Table 44: Module names and applicable notification events

BMC Remedy ITSM 7.6.0x module	Applicable notification events
Asset Management	■ Asset Scheduled Decommission ■ Asset Scheduled Maintenance ■ Bulk Inventory Reorder ■ CI Status Change ■ Configuration Item Approval ■ Configuration Scheduled Maintenance ■ Contract Expiration ■ Contract Expiration Warning ■ Escalated Notifications ■ License Management Exception ■ Resolution Escalation ■ Response Escalation ■ Unavailability Assignment
Broadcast	■ Broadcast Notification

BMC Remedy ITSM 7.6.0x module	Applicable notification events
Incident	■ Assignment ■ Change Associations ■ Incident Escalation ■ Known Error Solution ■ Known Error Workaround ■ OLA Resolution Escalated Notification ■ OLA Resolution Escalation ■ OLA Response Escalated Notification ■ OLA Response Escalation ■ Ownership Assignment ■ Problem Investigation Associations ■ Problem Investigation Completion ■ Resolution ■ SLA Resolution Escalated Notification ■ SLA Resolution Escalation ■ SLA Response Escalated Notification ■ SLA Response Escalation ■ UC Resolution Escalated Notification ■ UC Resolution Escalation ■ UC Response Escalated Notification ■ UC Response Escalation ■ Unavailability Restored

BMC Remedy ITSM 7.6.0x module	Applicable notification events
Infrastructure Change (Continued on next page)	■ Approval ■ Approval Information ■ Approval Resolution Escalated Notification ■ Approval Resolution Escalation ■ Change Coordinator Assignment ■ Change Coordinator Approval Rejection ■ Change Coordinator Completion ■ Change Coordinator Latent Completion ■ Change Coordinator Planning ■ Change Coordinator Pre-planning ■ Change Coordinator Re-scheduled ■ Change Coordinator Scheduled ■ Change Coordinator Scheduled For Review ■ Change Manager Assignment ■ Change Manager Approval Rejection ■ Change Manager Completion ■ Change Manager Group Escalation ■ Change Manager Latent Completion ■ Change Manager Next Dependent Change ■ Change Manager Planning ■ Change Manager Pre-planning ■ Change Manager Predecessor Completion

BMC Remedy ITSM 7.6.0x module	Applicable notification events
Infrastructure Change (Continued from previous page)	■ Change Manager Re-scheduled ■ Change Manager Scheduled ■ Change Manager Scheduled for Review ■ Change Worklog Assignment ■ Implementer Assignment ■ Implementer Planning ■ Implementer Pre-planner ■ Implementer Scheduled ■ Manual Notification ■ Non-Approval Information ■ OLA Resolution Escalated Notification ■ OLA Resolution Escalation ■ OLA Response Escalated Notification ■ OLA Response Escalation ■ Requester Change Cancellation

BMC Remedy ITSM 7.6.0x module	Applicable notification events
Infrastructure Change (Continued from previous page)	■ Requester Change Receipt Confirmation ■ Requester Completion ■ Requester Change Re-scheduled ■ Requester Change Scheduled ■ Requester Rejection ■ SLA Response Escalated Notification ■ Task Cancellation ■ Task Pending ■ Unavailability Restored
Problem Management	■ Change Completed ■ Known Error Assignment ■ Known Error Manager Assignment ■ Problem Assignment ■ Problem Cancelled ■ Problem Completed ■ Problem Coordinator Assignment ■ Solution Assignment ■ Unavailability Restored
Reminders	■ Reminders Notification

BMC Remedy ITSM 7.6.0x module	Applicable notification events
Request Management	■ Assignment ■ Request Cancellation ■ Request Definition Status Changed ■ Request Manager Assignment ■ Request Rejected ■ Request Response Escalation ■ Request Status Changed ■ Request Submitted ■ Work Order Assignee Assignment ■ Work Order Manager Assignment ■ Work Order Status Cancelled ■ Work Order Status Completed ■ Work Order Status In Progress ■ Work Order Status Pending ■ Work Order Status Rejected ■ Work Order Submit
Task Management	■ Task Assigned ■ Task Status Changed

Permission groups

This section lists the permission groups in BMC Remedy ITSM 7.6.0x, along with the applicable license types. For a more detailed description of each permission group, see the *BMC Remedy IT Service Management Administration Guide*.

Table 45: Permission groups and applicable license types

BMC Remedy ITSM 7.6.0x permission group	Applicable license types			
	Read	Fixed	Floating	None
Activity Config				Yes
Activity User				Yes
Activity Viewer				Yes
Administrator				Yes
ApprovalAdmin				Yes
ASE-Administrator				Yes
Asset Admin		Yes	Yes	Yes
Asset Config		Yes	Yes	Yes
Asset User		Yes	Yes	Yes
Asset Viewer				Yes
Browser				Yes
CM Dashboard User				Yes
Command Event Master				Yes
Config Categorization Admin				Yes
Config Categorization User				Yes
Config Group Mapping Admin				Yes
Contact Location Admin				Yes
Contact Organization Admin				Yes
Contact People Admin				Yes
Contact People HR Admin				Yes
Contact People User				Yes
Contact Support Admin				Yes
Contract Admin		Yes	Yes	Yes
Contract Config		Yes	Yes	
Contract User		Yes	Yes	Yes
Contract Viewer				Yes
Cost Manager		Yes	Yes	Yes
Customize				Yes
DSL Master				Yes

BMC Remedy ITSM 7.6.0x permission group	Applicable license types			
	Read	Fixed	Floating	None
DSL Viewer				Yes
Incident Config		Yes	Yes	
Incident Master		Yes	Yes	
Incident Submitter	Yes			
Incident User		Yes	Yes	
Incident Viewer				Yes
Infrastructure Change Config		Yes	Yes	
Infrastructure Change Master		Yes	Yes	
Infrastructure Change Submit	Yes			
Infrastructure Change User		Yes	Yes	
Infrastructure Change Viewer				Yes
Licensing				Yes
Notification Admin				Yes
Problem Config		Yes	Yes	
Problem Master		Yes	Yes	
Problem Submitter	Yes			
Problem User		Yes	Yes	
Problem Viewer				Yes
Purchasing User		Yes	Yes	
Receiving User				Yes
Release Config				Yes
Release Master				Yes
Release User				Yes
Release Viewer				Yes
Requester Console Config				Yes
Requester Console Master				Yes
ROI Admin				Yes
ROI Viewer				Yes
Security				Yes
SLM Config		Yes	Yes	

BMC Remedy ITSM 7.6.0x permission group	Applicable license types			
	Read	Fixed	Floating	None
SLM Customer		Yes	Yes	
SLM Manager		Yes	Yes	
Sub Administrator				Yes
Summary Definition Config				Yes
Task Administrator				Yes
Task Application Config				Yes
Task Manager				Yes
Task Process Config				Yes
Task User				Yes

Relationship types

On the `Transactional-SharedComponents.xls` spreadsheet, the SHR-Association tab is used to specify associations (or relationships) between records. You can create relationships between any request types, *except* those noted in the Relationships that are not valid table.

Table 46: Relationships that are *not* valid

From request type	Relationship type	To request type
Any	Any	Same request
Solution database	Any	Any
Infrastructure change	Any	Solution database
Incident marked as duplicate	Any	Any
Incident marked as original	Duplicate of	Any request type *except* incident

Request types

On the `Transactional-SharedComponents.xls` spreadsheet, the SHR-Association tab is used to specify associations (or relationships) between records. This tab includes two columns for Request Type that identify the request type of the two records being associated and that must be completed with one of the following text or numeric values:

- 6000—Configuration Item
- 9000—Incident
- 12000—Infrastructure Change
- 15000—Solution Database
- 16000—Known Error
- 20000—Problem Investigation

For more information, see Using Transactional-SharedComponents.xls to populate the Service or CI fields in an incident, problem, known error, or change on page 68.

Timing Reasons

On the `Transactional-Change.xls` spreadsheet, the CHG-InfrastructureChange tab includes columns for Timing and Timing Reason. Timing is a required field on the Infrastructure Change form. Timing Reason is a required field for the Timing values listed in the Timing value and corresponding Timing reason values table. This table lists the values available for Timing and the corresponding values for Timing Reason.

Table 47: Timing values and corresponding Timing Reason values

Timing values	Timing Reason numeric values	Timing Reason text values
Expedited	1000	Customer/business need
	2000	Insufficient lead-time
	3000	Known error correction
	4000	Scheduling conflict

Status reasons

For forms that include Status as a required field, Status Reason is a required field for the status values indicated in the following tables. These tables are grouped by the spreadsheet used to upload data to the forms.

For Transactional-Change.xls

On the `Transactional-Change.xls` spreadsheet, the CHG-InfrastructureChange tab includes columns for Status and Status Reason. Status is a required field on the Change form. Status Reason is a required field for only certain Status values.

Table 48 on page 212 lists the Status values for which Status Reason is a required field. This table lists the values available for Status and the corresponding values for Status Reason.

Table 48: Change Status values and corresponding Status Reason values

Status values	Status Reason numeric values	Status Reason text values
Planning In Progress	28000	Accepted
	29000	Assigned
	30000	Built
Implementation In Progress	14000	In Rollout
	17000	In Development
	18000	In Test
	19000	In Build
	20000	In Rollback
	21000	In Documentation
	13000	In Verification
Pending	27000	Manager Intervention
	25000	Miscellaneous
	22000	Vendor Purchase
	26000	Future Enhancement
	23000	Support Group Communication
	24000	Task Review
Rejected	12000	Insufficient Task Data
	15000	Insufficient Change Data
	16000	Schedule Conflicts
Completed	10000	Final Review Required
	9000	Final Review Complete
	11000	Additional Coding Required

Status values	Status Reason numeric values	Status Reason text values
Closed	5000	Successful
	6000	Successful with Issues
	7000	Unsuccessful
	8000	Backed Out
Cancelled	1000	No Longer Required
	2000	Funding Not Available
	3000	To Be Re-Scheduled
	4000	Resources Not Available

For Transactional-Contract.xls

On the `Transactional-Contract.xls` spreadsheet, the AST-AssetLease, AST-AssetMaintenance, AST-AssetSoftware, AST-AssetSupport, AST-AssetWarranty, CTR-GenericContract, and CTR-MasterContract tabs include columns for Status and Status Reason. Status is a required field on the CTR:ContractBase, AST:AssetLease_, AST:AssetMaintenance_, AST:AssetSoftware_, AST:AssetSupport_, AST:AssetWarranty_, CTR:GenericContract_, and CTR:MasterContract_ forms.

Status values and corresponding Status Reason values are listed in Table 49 on page 213. The corresponding Status Reason values are optional. If no Status value is entered, the default value is Executed.

Table 49: Asset Status values and corresponding Status Reason values

Status values	Status Reason numeric values	Status Reason text values
Draft	2000	In negotiation
	3000	Pending Signature
Executed	1000	Active
	4000	Requires Attention
	5000	Under re-negotiation
	6000	Change Pending
	7000	On Hold

Status values	Status Reason numeric values	Status Reason text values
Historical	8000	Expired
	9000	Terminated
	10000	Cancelled
Delete	11000	Scheduled for Deletion

For Transactional-Problem.xls

On the `Transactional-Problem.xls` spreadsheet, several tabs include columns for Status and for Status Reason. Status is a required field on each corresponding form.

Status Reason is a required field for the Status values listed in Table 50 on page 214. This table lists the values available for Status and the corresponding values for Status Reason.

Table 50: Problem Status values and corresponding Status Reason values

Spreadsheet tab	Status values	Status Reason numeric values	Status Reason text values
Known Error	Cancelled	1000	Duplicate
		2000	No Longer Applicable
	Corrected	3000	Pending PIR
	No Action Planned	4000	Funding Not Available
	Scheduled for Correction	5000	Pending Infrastructure Change
		6000	Pending Third Party Vendor

Spreadsheet tab	Status values	Status Reason numeric values	Status Reason text values
Problem Investigation	Completed	1000	Known Error
		2000	Unresolvable
		3000	Solution Database
		4000	Enhancement Request
	Cancelled	5000	Duplicate Investigation
	Pending	6000	Local Site Action Required
		7000	Purchase Order Approval
		8000	Registration Approval
		9000	Infrastructure Change
		10000	Support Contract Hold
		11000	Third Party Vendor Action Reqd
		12000	Pending Original Problem
		13000	Supplier Delivery
		14000	Request
		15000	Client Action Required
		16000	Client Hold
		17000	Monitoring Problem
		18000	Future Enhancement
		19000	Automated Resolution Reported
Solution Database	Inactive	3000	Not Applicable

For Transactional-Incident.xls

On the `Transactional-Incident.xls` spreadsheet, the HPD-HelpDesk tab includes columns for Status and Status Reason. Status is a required field on the Incident form.

Status Reason is a required field for the Status values listed in Table 51 on page 216. This table lists the values available for Status and the corresponding values for Status Reason.

Table 51: Incident Status values and corresponding Status Reason values

Spreadsheet tab	Status Reason numeric values	Status Reason text values
Pending	2000	Local Site Action Required
	3000	Purchase Order Approval
	4000	Registration Approval
	5000	Supplier Delivery
	6000	Support Contact Hold
	7000	Third Party Vendor Action Reqd
	8000	Client Action Required
	9000	Infrastructure Change
	10000	Request
	11000	Future Enhancement
	12000	Pending Original Incident
	13000	Client Hold
	14000	Monitoring Incident
	19000	Automated Resolution Reported
Resolved	11000	Future Enhancement
	14000	Monitoring Incident
	15000	Customer Follow-Up Required
	16000	Temporary Corrective Action
	17000	No Further Action Required
	19000	Automated Resolution Reported
Closed	1000	Infrastructure Change Created
	19000	Automated Resolution Reported
Cancelled	20000	No longer a Causal CI

On the `Transactional-Incident.xls` spreadsheet, the TMS-Task tab includes columns for Status and Status Reason. Status is a required field on the TMS:TaskGroup form. Status Reason is a required field for the Status values listed in the following table. This table lists the values available for Status and the corresponding values for Status Reason.

Table 52: Incident task Status values and corresponding Status Reason values

Status values	Status Reason numeric values	Status Reason text values
Closed	1000	Success
	2000	Failed
	3000	Canceled
Pending	4000	Assignment
	9000	Error
Staged	5000	Staging in Progress
	6000	Staging Complete
Waiting	7000	Acknowledgment
	8000	Completion

For Transactional-Task.xls

On the `Transactional-Task.xls` spreadsheet, the TMS-Task tab includes columns for Status and Status Reason.

Status Reason is a required field for the Status values listed in Table 53 on page 217. This table lists the values available for Status and their corresponding values for Status Reason.

Table 53: Task Status values and corresponding Status Reason values

Status values	Status Reason numeric values	Status Reason text values
Closed	1000	Success
	2000	Failed
	3000	Canceled
Pending	4000	Assignment
	9000	Error

Time zones

On the `SupportGroup.xls` spreadsheet, the 06 BusinessTimeHolidays tab includes a column for time zone, which must be completed with one of the following values:

- (GMT -12:00) Eriwetok, Kwajalein
- (GMT -11:00) Midway Island, Samoa
- (GMT -10:00) Hawaii
- (GMT -09:00) Alaska
- (GMT -08:00) Pacific Time (US & Canada); Tijuana
- (GMT -07:00) Arizona
- (GMT -07:00) Mountain Time (US & Canada)
- (GMT -06:00) Central Time (US & Canada)
- (GMT -06:00) Mexico City (Tegucigalpa)
- (GMT -06:00) Saskatchewan
- (GMT -05:00) Bogota, Lima, Quito
- (GMT -05:00) Eastern Time (US & Canada)
- (GMT -05:00) Indiana (East)
- (GMT -04:00) Atlantic Time (Canada)
- (GMT -04:00) Caracas, La Paz
- (GMT -03:30) Newfoundland
- (GMT -03:00) Brasilia
- (GMT -03:00) Buenos Aries, Georgetown
- (GMT -02:00) Mid-Atlantic
- (GMT -01:00) Azores, Cape Verde Is.
- (GMT) Casablanca, Monrovia
- (GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London

- (GMT +1:00) Amsterdam, Copenhagen, Madrid, Paris, Vilnius
- (GMT +1:00) Belgrade, Sarajevo, Skopje, Sofija, Zagreb
- (GMT +1:00) Bratislava, Budapest, Ljubljana, Prague, Warsaw
- (GMT +1:00) Brussels, Berlin, Bern, Rome, Stockholm, Vienna
- (GMT +2:00) Athens, Istanbul, Minsk
- (GMT +2:00) Bucharest
- (GMT +2:00) Cairo
- (GMT +2:00) Harare, Pretoria
- (GMT +2:00) Helsinki, Riga, Tallinn
- (GMT +2:00) Israel
- (GMT +3:00) Baghdad, Kuwait, Riyadh
- (GMT +3:00) Moscow, St. Petersburg, Volgograd
- (GMT +3:00) Nairobi
- (GMT +3:30) Tehran
- (GMT +4:00) Abu Dhabi, Muscat
- (GMT +4:00) Baku, Tbilisi
- (GMT +4:30) Kabul
- (GMT +5:00) Ekaterinburg
- (GMT +5:00) Islamabad, Karachi, Tashkent
- (GMT +5:30) Bombay, Calcutta, Madras, New Delhi
- (GMT +6:00) Almaty, Dhaka
- (GMT +6:00) Colombo
- (GMT +7:00) Bangkok, Hanoi, Jakarta
- (GMT +8:00) Beijing, Chongqing, Hong Kong, Urumqi
- (GMT +8:00) Perth

- (GMT +8:00) Singapore
- (GMT +8:00) Taipei
- (GMT +9:00) Osaka, Sapporo, Tokyo
- (GMT +9:00) Seoul
- (GMT +9:00) Yakutsk
- (GMT +9:30) Adelaide
- (GMT +9:30) Darwin
- (GMT +10:00) Brisbane
- (GMT +10:00) Canberra, Melbourne, Sydney
- (GMT +10:00) Guam, Port Moresby
- (GMT +10:00) Hobart
- (GMT +10:00) Vladivostok
- (GMT +11:00) Magadan, Solomon Is., New Caledonia
- (GMT +12:00) Auckland, Wellington
- (GMT +12:00) Fiji, Kamchatka, Marshall Is.

How tabs map from spreadsheet to target form

This appendix describes how tabs in the Excel (XLS) spreadsheets map to staging forms, and how the staging forms map to the primary target forms in BMC Remedy ITSM 7.6.0x.

Foundation data mapping

This section lists the mapping of foundation data from spreadsheets to target forms.

Table 54: Foundation data mapping

Spreadsheet	Tab	Staging form	Target form or forms
`Company.xls`	01 COM-Company	COM:LoadCompany	COM:Company
`Company.xls`	02 COM-CompanyAlias	COM:LoadCompanyAlias	COM:Company Alias
`Financials.xls`	01 FIN-ConfigCostCentersRepository	FIN:LoadConfigCostCentersRep	FIN:ConfigCostCentersRepository
`Financials.xls`	02 FIN-CostCenterUDAssociations	FIN:LoadCostCenterUDAAssoc	FIN:CostCenterUDAAssociations
`GenericCatalog.xls`	01 CFG-GenericCatalog	CFG:LoadGenericCatalog	CFG:Generic Catalog
`GenericCatalog.xls`	02 CFG-GenericProdServiceAssoc	CFG:LoadGenericProdSerAssoc	CFG:GenericProdServiceAssoc
`GenericCatalog.xls`	03 CFG-GenericCompanyModuleAsso	CFG:LoadGenericCpyModuleAssoc	CFG:GenericCompanyModuleAssoc
`Geography.xls`	CTM-Postal Codes	CTM:LoadPostalCodes	CTM:PostalCodes
`Location.xls`	01 SIT-Site	SIT:LoadSite	SIT:Site

Spreadsheet	Tab	Staging form	Target form or forms
`Location.xls`	02 SIT-SiteAlias	SIT:LoadSiteAlias	SIT:Site Alias
`Location.xls`	03 CTM-Region	CTM:LoadRegion	CTM:Region
`Location.xls`	04 SIT-SiteGroup	SIT:LoadSiteGroup	SIT:Site Group
`Location.xls`	05 SIT-SiteCompanyAssociation	SIT:LoadSiteCompanyAssoc	SIT:Site Company Association
`OperationalCatalog.xls`	01 CFG-OperationalCatalog	CFG:LoadServiceCatalog	CFG:Service Catalog
`OperationalCatalog.xls`	02 CFG-OperationalCatalogAssoc	CFG:LoadServiceCatalogAssoc	CFG:Service Catalog Assoc
`People.xls`	01 CTM-PeopleTemplate	CTM:LoadPeopleTemplate	CTM:People Template
`People.xls`	02 CTM-People	CTM:LoadPeople	■ CTM:People ■ User (if a Remedy Login ID is specified)
`People.xls`	03 CTM-PeopleTemplatePG	CTM:LoadPeopleTemplatePG	CTM:People Template PG
`People.xls`	04 CTM-PeopleTemplateSG	CTM:LoadPeopleTemplateSG	CTM:People Template SG
`People.xls`	05 CTM-PeopleTemplateSFR	CTM:LoadPeopleTemplateSFR	■ CTM:SupportGroupFunctionalRole ■ AP:Role
`People.xls`	06 CTM-Login	CTM:LoadPeopleAttributes	CTM:Login ID
`People.xls`	07 CTM-PeopleWallet	CTM:LoadPeopleAttributes	CTM:People Wallet
`People.xls`	08 CTM-PeopleHRAttendanceMgmt	CTM:LoadPeopleAttributes	CTM:People HR Attendance Mgmt
`People.xls`	09 CTM-PeopleHRTimeManagement	CTM:LoadPeopleAttributes	CTM:People HR Time Management
`People.xls`	10 CTM-PeopleEducation	CTM:LoadPeopleAttributes	CTM:People Education
`People.xls`	11 CTM-PeopleTravelProfile	CTM:LoadPeopleAttributes	CTM:People Travel Profile

Spreadsheet	Tab	Staging form	Target form or forms
People.xls	12 CTM-PeopleBenefitInfo	CTM:LoadPeopleAttributes	CTM:People Benefit Info
People.xls	13 CTM-PeopleITSkills	CTM:LoadPeopleAttributes	CTM:People IT Skills
People.xls	14 FIN-CostCenterUDAssociations	FIN:LoadCostCenterUDAAssoc	FIN:CostCenterUDAAssociations
People.xls	15 CTM-PeopleWorkLog	CTM:LoadPeopleWorkLog	CTM:People WorkLog
People.xls	16 NTE-CFG-NotificationEvents	NTE:LoadCFGNotificationEvents	NTE:CFG-Notification Events
People.xls	17 CTM-PeopleAccessRestrictions	CTM:LoadPeoplePermissionGroups	CTM:PeoplePermission Groups
People.xls	18 CTM-PeoplePermissionGroups	CTM:LoadPeoplePermissionGroups	CTM:PeoplePermission Groups
People.xls	19 CTM-SupportGroupAssociation	CTM:LoadSupportGroup Association	CTM:Support Group Association
People.xls	20 CTM-SupportGrpFunctionalRole	CTM:LoadSupportGroupFunctionalRole	CTM:SupportGroupFunctionalRole
PeopleOrg.xls	CTM-PeopleOrganization	CTM:LoadPeople Organization	CTM:People Organization
ProductCatalog.xls	01 PCT-ProductCatalog	PCT:LoadProductCatalog	■ PCT:Product Catalog
ProductCatalog.xls	02 PCT-ProductAlias	PCT:LoadProductAlias	PCT:Product Alias
ProductCatalog.xls	03 PCT-ProductCompanyAssoc	PCT:LoadProdComAssoc	PCT:ProductCompanyAssociation
ProductCatalog.xls	04 PCT-ProductModelVersion	PCT:LoadProdModelVersion	PCT:Product Model/ Version
ProductCatalog.xls	05 PCT-ModelVersionPatch	PCT:LoadModelVersionPatch	PCT:ModelVersion Patch
ProductCatalog.xls	06 PCT-ProdCatalogAliasMapping	PCT:LoadProdCatAliasMapping	PCT:ProductCatalogAliasMappingForm
SupportGroup.xls	01 CTM-SupportGroup	CTM:LoadSupportGroup	CTM:Support Group
SupportGroup.xls	02 CTM-SupportGroupAssignments	CTM:LoadSGPAssignments	CTM:Support Group Assignments

Spreadsheet	Tab	Staging form	Target form or forms
SupportGroup.xls	03 CTM-SupportGroupAlias	CTM:LoadSupportGroup Alias	CTM:Support Group Alias
SupportGroup.xls	04 CTM-SupportGroupOnCall	CTM:LoadSGPOnCall	CTM:Support Group On-Call
SupportGroup.xls	05 BusinessTimeWorkdays	CFG:LoadBusinessTimeWorkdays	Business Time Workdays
SupportGroup.xls	06 BusinessTimeHolidays	CFG:LoadBusinessTimeHolidays	■ CFG:Business Holidays Storage ■ Business Time Holidays
SystemSetup.xls	NTE-CFG-PagerServiceConfig	NTE:LoadCFGPagerServiceConfig	NTE:CFG-Pager Service Config

Process setup data mapping

This section lists the mapping of process-setup data from spreadsheets to target forms.

Note

All of the spreadsheets and tabs listed in Table 55 on page 224 are sample data and can be loaded as described in Loading sample data on page 229, if you chose not to load it at installation time.

Table 55: Process setup data mapping

Spreadsheet	Tab	Staging form	Target form or forms
ProcessSetup - Change	APR-ApproverLookup	APR:LoadApproverLookup	APR:Approver Lookup
ProcessSetup - Change	CHG-Template	CHG:LoadTemplate	CHG:Template
ProcessSetup - Change	CHG-TemplateSPGAssoc	CHG:LoadTemplateSPG Assoc	CHG:TemplateSPGAssoc
ProcessSetup - Change	CHG-TemplateAssociations	CHG:LoadTemplateAssociations	CHG:Template Associations
ProcessSetup - Change	CHG-TemplateTaskTempAssoc	TMS:LoadAssociationTemplate	TMS:AssociationTemplate
ProcessSetup - Foundation	CFG-Assignment	CFG:LoadAssignment	CFG:Assignment

Spreadsheet	Tab	Staging form	Target form or forms
`ProcessSetup - Foundation`	AP-Alternate	APR:LoadAlternate	AP:Alternate
`ProcessSetup - Incident`	HPD-Template	HPD:LoadTemplate	HPD:Template
`ProcessSetup - Incident`	HPD-TemplateSPGAssoc	HPD:LoadTemplateSPG Assoc	HPD:TemplateSPG Assoc
`ProcessSetup-Incident.xls`	HPD-TemplateAssociations	HPD:LoadTemplateAssociations	HPD:Template Associations
`ProcessSetup - Incident`	CFG-Scripts	CFG:LoadScripts	CFG:Scripts
`ProcessSetup - Incident`	CFG-GroupEventMapping	CFG:LoadGroupEventMapping	CFG:Group Event Mapping
`ProcessSetup - Incident`	CFG-DecisionTree	CFG:LoadDecisionTree	CFG:Decision Tree
`ProcessSetup - Incident`	CFG-DecisionTree-MainBranch	CFG:LoadDecisionTreeBranch	CFG:Decision Tree-Branch
`ProcessSetup - Incident`	CFG-DecisionTree-Branch	CFG:LoadDecisionTreeBranch	CFG:Decision Tree-Branch
`ProcessSetup - Incident`	CFG-DecisionTree-BranchItem	CFG:LoadDecisionTreeBranch	CFG:Decision Tree-Branch
`ProcessSetup-Request.xls`	RQC-SummaryDefinition	RQC:LoadSummaryDefinition	RQC:SummaryDefinition
`ProcessSetup-Task.xls`	TMS-TaskGroupTemplate	TMS:LoadTaskGroupTemplate	TMS:TaskGroupTemplate
`ProcessSetup-Task.xls`	TMS-TaskTemplate	TMS:LoadTaskTemplate	TMS:TaskTemplate
`ProcessSetup-Task.xls`	TMS-AssociationTemplate	TMS:LoadAssociationTemplate	TMS:AssociationTemplate
`ProcessSetup-Task.xls`	TMS-FlowTemplate	TMS:LoadFlowTemplate	TMS:FlowTemplate
`ProcessSetup-Task.xls`	TMS-AssignmentConfig	TMS:LoadAssignmentConfig	TMS:AssignmentConfiguration

Transactional data mapping

This section lists the mapping of transactional data from spreadsheets to target forms.

Note

All of the spreadsheets and tabs listed in Table 56 on page 226 are sample data and can be loaded as described in Loading sample data on page 229, if you chose not to load it at installation time.

Table 56: Transactional data mapping

Spreadsheet	Tab	Staging form	Target form or forms
Transactional-Asset.xls	AST-WorkLog	AST:LoadWorkLog	AST:WorkLog
Transactional-Asset.xls	AST-AssetToAssetRelationship	AST:LoadBMC_BaseRelationship	■ BMC.CORE:BMC_BaseRelationship ■ BMC.CORE:BMC_Component ■ BMC.CORE:BMC_Dependency ■ BMC.CORE:BMC_MemberOfCollection
Transactional-Change.xls	CHG-InfrastructureChange	CHG:Infrastructure Change	CHG:LoadInfrastructureChange
Transactional-Change.xls	CHG-WorkLog	CHG:LoadWorkLog	CHG:WorkLog
Transactional-Change.xls	CHG-ImpactedAreas	CHG:LoadImpactedAreas	CHG:Impacted Areas
Transactional-Change.xls	AP-Signature	APR:LoadSignature	■ AP:Signature ■ AP:Detail
Transactional-Contract.xls	AST-AssetLease	CTR:LoadContractBase	CTR:ContractBase and AST:AssetLease_
Transactional-Contract.xls	AST-AssetMaintenance	CTR:LoadContractBase	CTR:ContractBase and AST:AssetMaintenance_
Transactional-Contract.xls	AST-AssetSoftware	CTR:LoadContractBase	CTR:ContractBase and AST:AssetSoftware_
Transactional-Contract.xls	AST-AssetSupport	CTR:LoadContractBase	CTR:ContractBase and AST:AssetSupport_
Transactional-Contract.xls	AST-AssetWarranty	CTR:LoadContractBase	CTR:ContractBase and AST:AssetWarranty_

Spreadsheet	Tab	Staging form	Target form or forms
Transactional-Contract.xls	CTR-GenericContract	CTR:LoadContractBase	CTR:ContractBase and CTR:GenericContract_
Transactional-Contract.xls	CTR-MasterContract	CTR:LoadContractBase	CTR:ContractBase and CTR:MasterContract_
Transactional-Contract.xls	CTR-WorkLog	CTR:LoadWorkLog	CTR:WorkLog
Transactional-Contract.xls	AST-LicenseCertificates	AST:LoadLicenseCertificates	■ AST:LicenseCertificates ■ AST:Connection_BasicQuestions ■ AST:Compliance_BasicQuestions
Transactional-Contract.xls	CTR-Contract_Relationship	CTR:LoadContract_Relationship	CTR:Contract_Realtionship
Transactional-Incident.xls	HPD-HelpDesk	HPD:LoadHelpDesk	■ HPD:HelpDesk ■ SRM:Request
Transactional-Incident.xls	HPD-Associations	This information is on the SHR-Associations tab of Transactional-SharedComponents.xls spreadsheet,	
Transactional-Incident.xls	HPD-WorkLog	HPD:LoadWorkLog	■ HPD:WorkLog ■ SRM:WorkInfo
Transactional-Incident.xls	HPD-ImpactedAreas	HPD:LoadImpactedAreas	HPD:Impacted Areas
Transactional-Problem.xls	PBM-ProblemInvestigation	PBM:LoadProblemInvestigation	PBM:Problem Investigation
Transactional-Problem.xls	PBM-InvestigationWorkLog	PBM:LoadInvestigationWorkLog	PBM:Investigation WorkLog
Transactional-Problem.xls	PBM-ImpactedAreas	PBM:LoadImpactedAreas	PBM:ImpactedAreas
Transactional-Problem.xls	PBM-KnownError	PBM:LoadKnownError	PBM:Known Error
Transactional-Problem.xls	PBM-KnownErrorWorkLog	PBM:LoadKnownErrorWorkLog	PBM:Known Error WorkLog

Spreadsheet	Tab	Staging form	Target form or forms
Transactional-Problem.xls	PBM-SolutionDatabase	PBM:LoadSolutionDatabase	PBM:SolutionDatabase
Transactional-Problem.xls	PBM-SolutionAlias	PBM:LoadSolutionDBAlias	PBM:SolutionDBAlias
Transactional-Problem.xls	PBM-SolutionWorkLog	PBM:LoadSolutionWorkLog	PBM:SolutionWorkLog
Transactional-Problem.xls	PBM-SolutionDBAdditionalMapping	PBM:SolutionDBAdditionalMappings	■ CFG:Group Event Mapping ■ CFG:GroupEventMapKDBAssoc
Transactional-SharedComponents.xls	SHR-Associations	SHR:LoadAssociations	■ HPD:Associations ■ AST:CMDB Associations ■ PBM:Investigation Associations ■ CHG:Associations
Transactional-SharedComponents.xls	CFG-Reminders	CFG:LoadReminders	CFG:Reminders
Transactional-SharedComponents.xls	FIN-Costs	FIN:LoadCosts	FIN:Costs
Transactional-SharedComponents.xls	FIN-Payments	FIN:LoadPayments	FIN:Payments
Transactional-SharedComponents.xls	CFG-BroadCast	CFG:LoadBroadcast	CFG:Broadcast
Transactional-SharedComponents.xls	CFG-BroadcastSPGAssoc	CFG:LoadBroadcastSPGAssoc	CFG:BroadcastSPGAssociation
Transactional-Task.xls	TMS-TaskGroup	TMS:LoadTaskGroup	TMS:TaskGroup
Transactional-Task.xls	TMS-Task	TMS:LoadTask	TMS:Task
Transactional-Task.xls	TMS-WorkInfo	TMS:LoadWorkInfo	TMS:WorkInfo

Loading sample data

This appendix describes how to load the Calbro sample data set if it was not loaded when BMC Remedy ITSM Suite was installed. It also describes how to delete the sample data.

About the sample data

The sample data set is a set of BMC Remedy ITSM records that are based on a fictitious company called Calbro Services. For more information about this company, see the *BMC Remedy ITSM Concepts Guide*.

Identifying the sample data records

Sample data records fall into two types:

- Default sample data, which is loaded for all new installations of BMC Remedy ITSM, regardless of whether you selected the option in the installation wizard to load the sample data
- Optional sample data, which is loaded for only new installations of BMC Remedy ITSM *only* if you selected the option in the installation wizard to load the data

> **Note**
> Optional sample data cannot be loaded for an upgrade.

Spreadsheets

The following sets of spreadsheets come with the Data Management client installer:

- The generic set of spreadsheets in the **7.6\Spreadsheets** folder. These spreadsheets contain no data. Use these spreadsheets for bulk loading your data.

- Sample data in the **7.6\SampleDataSpreadsheets\DefaultAndOptionalData** folder. These spreadsheets contain both default and optional sample data. They provide a complete reference for the sample data.
- Sample data in the **7.6\SampleDataSpreadsheets\OptionalData** folder. If you chose not to load sample data at installation time, you can use these spreadsheets to load the sample data.

If you want to use the sample data, you can load it after installing BMC Remedy ITSM by using the Data Load utility.

For more information about installing BMC Remedy ITSM and the Data Management tool, *see BMC Remedy IT Service Management Installation Guide*.

Loading sample data after installation

Refer to the tables in Appendix D of this guide as you follow the procedures in this section. The tables identify which spreadsheets, tabs, and rows of data are default or optional sample data.

To load the sample data after installation

1 Back up the generic spreadsheets that are installed on your client workstation from the **7.6\Spreadsheets** folder under the Data Management Client installation path.

You must copy the generic spreadsheets back to this location as described in step 5 below if you want to load your own data at another time. By default, the installation path is: **C:\Program Files\BMC Software\DataManagementClient**.

2 From the **7.6\Spreadsheets\SampleDataSpreadsheets** folder, copy the entire **OptionalData** folder (maintaining the directory structure) to the **Spreadsheets** folder under the Data Management Client installation path. The default path is:

C:\Program Files\BMC Software\DataManagementClient

3 Load the data as described in Chapter 3 "Importing data."

4 Validate and promote the data as described in Chapter 3.

5 When you are done promoting sample data to the system, copy the generic spreadsheets that you backed up earlier back into the **Spreadsheets** folder.

Deleting default and optional sample data

If you have installed optional data, or loaded it after installation, you have the option to delete the sample data. BMC recommends that you back up all your data before you delete the sample data.

For a detailed information on where the sample data is installed within BMC Remedy ITSM, see Default and optional sample data on page 232.

To delete default or optional sample data

1 To find out which forms you need to search, see Table 57 on page 232.

2 Search the corresponding forms and delete records based on the following values:

- `‘DataTags’ = SEEDDATA”`
- `‘DataTags’ = SOLUTIONDATA”`

A few of the forms do not have a Data Tags field. These forms are indicated in Table 57 on page 232.

For target forms that do not have the DataTags field, identify the default and optional solution data records and delete them. Consider using the following search criteria:

- Submitter or Created by field with a value of `Remedy Application Service` (ID of 2)
- A Create Date that matches the date that the data was loaded
- A Name that matches the Support Group ID for loaded records on the Support Group form (for the CTM:LoadSGPOnCall staging form and the CFG:Business Time Workdays target form only)

WARNING

Do not delete records based on the creation date only. Before deleting, make sure that the data in these records is sample data.

3 Select the records to be deleted, and select **Action => Delete**.

4 Save the form.

If a problem occurs

For forms where the **Delete** button is disabled causing sample data records not able to be deleted, open the forms with BMC Remedy Developer Studio and enable the

Delete button from **View Properties => Menu Access**. After deleting the sample data records, disable the **Delete** button on the forms.

Default and optional sample data

This section provides information on where the sample data is installed within BMC Remedy ITSM. It lists all of the forms from which removal of sample data is required.

Table 57: Forms with sample data

Staging form	Target form	Default or optional sample data?
COM:LoadCompany	CTM:SYS-Access Permission Grps	First two rows only (Calbro Services and Invention, Inc.) are default sample data; the rest of the rows are optional sample data.
COM:LoadCompany	COM:Company Alias	
COM:LoadCompany	COM:Company	
COM:LoadCompanyAlias	COM:Company Alias	Default
SIT:LoadSite	SIT:Site	Default
SIT:LoadSite	SIT:Site Alias	Default
SIT:LoadSiteAlias	SIT:Site Alias	Default
SIT:LoadSiteGroup	SIT:Site Group	Default
SIT:LoadSiteCompanyAssoc	SIT:Site Company Association	Default
PCT:LoadProductCatalog	PCT:Product Catalog	Default
PCT:LoadProductCatalog	PCT:Product Alias	Default
PCT:LoadProductCatalog	PCT:ProductCompanyAssociation	Default
PCT:LoadProductAlias	PCT:Product Alias	Default
PCT:LoadProdComAssoc	PCT:ProductCompanyAssociation	Default
PCT:LoadProdModelVersion	PCT:Product Model/Version	Default
PCT:LoadModelVersionPatch	PCT:ModelVersion Patch	Default
PCT:LoadProdCatAliasMapping	PCT:ProductCatalogAliasMappingForm	Default
APR:LoadSignature	AP:Signature	Optional **Note:** This target form does not have a Data Tags field.
CFG:LoadAssignment	CFG:Assignment	Optional
CFG:LoadBroadcast	CFG:Broadcast	Optional
CFG:LoadBroadcast	CFG:BroadcastSPGAssociation	Optional

Staging form	Target form	Default or optional sample data?
CFG:LoadBroadcastSPGAssoc	CFG:BroadcastSPGAssociation	Optional
CFG:LoadBusinessTimeHolidays (push default)	CFG:Business Holidays Storage	Optional
CFG:LoadBusinessTimeHolidays	CFG:Business Holidays Storage	Optional
CFG:LoadBusinessTimeHolidays	Business Time Workdays	Default **Note:** This target form does not have a Data Tags field.
CFG:LoadBusinessTimeHolidays	Business Time Holidays	Optional **Note:** This target form does not have a Data Tags field.
CFG:LoadBusinessTimeWorkdays	Business Time Workdays	Optional **Note:** This target form does not have a Data Tags field.
CFG:LoadBusinessTimeWorkdays	CFG:Business Holidays Storage	Optional
CFG:LoadDecisionTree	CFG:Decision Tree	Optional
CFG:LoadDecisionTreeBranch	CFG:Decision Tree-Branch	Optional
CFG:LoadGenericCatalog	CFG:Generic Catalog	Default
CFG:LoadGenericCPYModuleAssoc	CFG:GenericCompanyModuleAssoc	Default
CFG:LoadGenericProdSerAssoc	CFG:Generic Catalog	Default
CFG:LoadGenericProdSerAssoc	CFG:GenericProdServiceAssoc	Default
CFG:LoadGenericProdSerAssoc	CFG:GenericCompanyModuleAssoc	Default
CFG:LoadGroupEventMapping	CFG:Group Event Mapping	Optional
CFG:LoadGroupEventMapping	CFG:GroupEventMapScriptAssoc	Optional
CFG:LoadReminders	CFG:Reminders	Optional
CFG:LoadScripts	CFG:CFG ScriptTagNumGenerator	Optional
CFG:LoadScripts	CFG:Scripts	Optional
CFG:LoadServiceCatalog	CFG:Service Catalog	Default
CFG:LoadServiceCatalog	CFG:Service Catalog Assoc	Default
CFG:LoadServiceCatalogAssoc	CFG:Service Catalog Assoc	Default
CHG:LoadImpactedAreas	CHG:Impacted Areas	Optional
CHG:LoadInfraChangeEffortLog	CHG:Infra. Change Effort Log	Optional
CHG:LoadInfrastructureChange	CHG:Infrastructure Change	Optional
CHG:LoadInfrastructureChange	SRM:AppInstanceBridge	Optional

Staging form	Target form	Default or optional sample data?
CHG:LoadInfrastructureChange	SRM:Request	Optional
CHG:LoadInfrastructureChange	CHG:Impacted Areas	Optional
CHG:LoadTemplate	CHG:Template	Optional
CHG:LoadTemplate	CHG:TemplateSPGAssoc	Optional
CHG:LoadTemplateAssociations	CHG:Template Associations	Optional
CHG:LoadTemplateSPGAssoc	CHG:TemplateSPGAssoc	Optional
CHG:LoadWorklog	CHG:WorkLog	Optional
CTM:LoadPeople	User	Optional **Note:** This target form does not have a Data Tags field.
CTM:LoadPeople	CTM:People	Optional
CTM:LoadPeople (unrestricted access)	CTM:People Permission Groups	Optional
CTM:LoadPeople (Asset Viewer)	CTM:People Permission Groups	Optional
CTM:LoadPeople (General Access)	CTM:People Permission Groups	Optional
CTM:LoadPeople	FIN:CostCenterUDAAssociations	Optional
CTM:LoadPeopleAttributes	CTM:People IT Skills	Optional
CTM:LoadPeopleAttributes	CTM:People Education	Optional
CTM:LoadPeopleAttributes	CTM:People HR Time Management	Optional
CTM:LoadPeopleAttributes	CTM:Login ID	Optional
CTM:LoadPeopleAttributes	CTM:People Benefit Info	Optional
CTM:LoadPeopleAttributes	CTM:People Travel Profile	Optional
CTM:LoadPeopleAttributes	CTM:People Wallet	Optional
CTM:LoadPeopleAttributes	CTM:People HR Attendance Mgmt	Optional
CTM:LoadPeopleAttributes	CTM:People Attributes	Optional
CTM:LoadPeopleOrganization	CTM:People Organization	Optional
CTM:LoadPeoplePermissionGroups	CTM:People Permission Groups	Optional
CTM:LoadPeopleTemplate	CTM:CFG PTTicket Num Generator	Optional
CTM:LoadPeopleTemplate	CTM:People Template	Optional
CTM:LoadPeopleTemplatePG	CTM:People Template PG	Optional
CTM:LoadPeopleTemplatePGJoin	CTM:People Permission Groups	Optional

Staging form	Target form	Default or optional sample data?
CTM:LoadPeopleTemplateSFR	AP:Role	Optional **Note:** This target form does not have a Data Tags field.
CTM:LoadPeopleTemplateSFR	CTM:SupportGroupFunctionalRole	Optional
CTM:LoadPeopleTemplateSFR	CTM:People_Template_SFR	Optional
CTM:LoadPeopleTemplateSFRJoin	CTM:SupportGroupFunctionalRole	Optional **Note:** This target form does not have a Data Tags field.
CTM:LoadPeopleTemplateSFRJoin	AP:Role	Optional
CTM:LoadPeopleTemplateSG	CTM:People Template SG	Optional
CTM:LoadPeopleTemplateSGJoin	CTM:Support Group Association	Optional
CTM:LoadPeopleTemplateSGJoin	CTM:People Permission Groups	Optional
CTM:LoadPeopleWorklog	CTM:People WorkLog	Optional
CTM:LoadPeopleWorklog	CTM:People WorkLog	Optional
CTM:LoadPostalCodes	CTM:PostalCodes	Optional
CTM:LoadRegion	CTM:Region	Optional
CTM:LoadSGPAssignments	CTM:Support Group Assignments	Optional
CTM:LoadSGPOnCall	CTM:Support Group On-Call	Default
CTM:LoadSGPOnCall	CFG:BusTimeTagGenerator	Default
CTM:LoadSGPOnCall	CFG:Business Time Workdays	Default **Note:** This target form does not have a Data Tags field.
CTM:LoadSupportGroup	CTM:Support Group	Default
CTM:LoadSupportGroup	CTM:Support Group Alias	Default
CTM:LoadSupportGroup	CTM:SYS-Access Permission Grps	Default
CTM:LoadSupportGroupAlias	CTM:Support Group Alias	Default
CTM:LoadSupportGroupAssociation	CTM:Support Group Association	Optional
CTM:LoadSupportGroupAssociation	CTM:People Permission Groups	Optional
CTM:LoadSupportGroupFunctionalRole	AP:Role	Optional **Note:** This target form does not have a Data Tags field.
CTM:LoadSupportGroupFunctionalRole	CTM:SupportGroupFunctionalRole	Optional

Staging form	Target form	Default or optional sample data?
CTR:LoadContract_Relationship	FIN:Costs	Optional
CTR:LoadContract_Relationship	FIN:Association	Optional
CTR:LoadContract_Relationship	FIN:Association	Optional
CTR:LoadContract_Relationship	AST:CMDB Associations	Optional
CTR:LoadContract_Relationship (parent_	CTR:Contract_Relationship	Optional
CTR:LoadContract_Relationship (child)	CTR:Contract_Relationship	Optional
CTR:LoadContractBase	AST:AssetWarranty_	Optional
CTR:LoadContractBase	AST:AssetMaintenance_	Optional
CTR:LoadContractBase	AST:AssetSoftware_	Optional
CTR:LoadContractBase	AST:AssetSupport_	Optional
CTR:LoadContractBase	CTR:GenericContract_	Optional
CTR:LoadContractBase	CTR:MasterContract_	Optional
CTR:LoadContractBase	AST:AssetLease_	Optional
CTR:LoadContractBase	CTR:ContractBase	Optional
CTR:LoadWorkLog	CTR:WorkLog	Optional
FIN:LoadConfigCostCentersRep	FIN:ConfigCostCentersRepository	Default
FIN:LoadCostCenterUDAAssoc	FIN:CostCenterUDAAssociations	Optional
FIN:LoadCostCenterUDAAssoc	FIN:CostCenterUDAAssociations	Optional
FIN:LoadCosts	FIN:Association	Optional
FIN:LoadCosts	FIN:Costs	Optional
FIN:LoadPayments	FIN:Payments	Optional
HPD:LoadHelpDesk	HPD:Help Desk	Optional
HPD:LoadHelpDesk	HPD:Help Desk Assignment Log	Optional
HPD:LoadHelpDesk	SRM:AppInstanceBridge	Optional
HPD:LoadHelpDesk	SRM:Request	Optional
HPD:LoadHelpDesk	SRM:WorkInfo	Optional
HPD:LoadImpactedAreas	HPD:Impacted Areas	Optional
HPD:LoadTemplate	HPD:Template	Optional
HPD:LoadTemplate	HPD:TemplateSPGAssoc	Optional
HPD:LoadTemplateAssociations	HPD:Template Associations	Optional

Staging form	Target form	Default or optional sample data?
HPD:LoadWorkLog	SRM:WorkInfo	Optional
HPD:LoadWorkLog	HPD:WorkLog	Optional
NTE:LoadCFGNotificationEvents	NTE:CFG-Notification Events	Optional
NTE:LoadCFGPagerServiceConfig	NTE:CFG-Pager Service Config	Default
PBM:LoadImpactedAreas	PBM:Impacted Areas	Optional
PBM:LoadInvestigationEffortLog	PBM:Investigation Effort Log	Optional
PBM:LoadInvestigationWorkLog	PBM:Investigation WorkLog	Optional
PBM:LoadKnownError	PBM:Known Error	Optional
PBM:LoadKnownErrorWorkLog	PBM:Known Error WorkLog	Optional
PBM:LoadProblemInvestigation	PBM:Problem Investigation	Optional
PBM:LoadSolutionDatabase	PBM:Solution Database	Optional
PBM:LoadSolutionDatabase	PBM:Solution DB Alias	Optional
PBM:LoadSolutionDatabase	CFG:Group Event Mapping	Optional
PBM:LoadSolutionDatabase	CFG:GroupEventMapKDBAssoc	Optional
PBM:LoadSolutionDBAdditionalMappings	CFG:Group Event Mapping	Optional
PBM:LoadSolutionDBAdditionalMappings	CFG:GroupEventMapKDBAssoc	Optional
PBM:LoadSolutionDBAlias	PBM:Solution DB Alias	Optional
PBM:LoadSolutionWorkLog	PBM:Solution WorkLog	Optional
RQC:LoadSummaryDefinition	RQC:SummaryDefinition	Optional
SHR:LoadAssociations	HPD:Associations	Optional
SHR:LoadAssociations	PBM:Investigation Associations	Optional
SHR:LoadAssociations (reverse)	HPD:Associations	Optional
SHR:LoadAssociations (reverse)	HPD:Associations	Optional
SHR:LoadAssociations	AST:CMDB Associations	Optional
SHR:LoadAssociations (reverse)	AST:CMDB Associations	Optional
TMS:LoadAssignmentConfig	TMS:AssignmentConfiguration	Optional
TMS:LoadAssociationTemplate	TMS:AssociationTemplate	Optional
TMS:LoadAssociationTemplate (task group)	TMS:SummaryData	Optional
TMS:LoadAssociationTemplate (task template)	TMS:SummaryData	Optional

Staging form	Target form	Default or optional sample data?
TMS:LoadAssociationTemplate	TMS:FlowTemplate	Optional
TMS:LoadAssociationTemplate	TMS:FlowTemplate	Optional
TMS:LoadFlowTemplate	TMS:FlowTemplate	Optional
TMS:LoadTask	TMS:Task	Optional
TMS:LoadTask	TMS:Association	Optional
TMS:LoadTask	TMS:MetricsSummary	Optional
TMS:LoadTask	TMS:SummaryData	Optional
TMS:LoadTask	TMS:Flow	Optional
TMS:LoadTaskGroup	TMS:TaskGroup	Optional
TMS:LoadTaskGroup	TMS:Association	Optional
TMS:LoadTaskGroup	TMS:SummaryData	Optional
TMS:LoadTaskGroup	TMS:Flow	Optional
TMS:LoadTaskGroupTemplate	TMS:TaskGroupTemplate	Optional
TMS:LoadTaskTemplate	TMS:TaskTemplate	Optional
TMS:LoadWorkInfo	TMS:WorkInfo	Optional

Modifying foundation data in related applications

The data wizard modifies foundation data in BMC Remedy ITSM forms and in configuration items (CIs). It does not, however, modify foundation data in other applications, such as BMC Service Level Management , BMC Remedy Knowledge Management, and BMC Service Request Management.

Foundation data modified by the data wizard

The following foundation data is modified by the data wizard. If you use the data wizard to modify this data, you must change the same data on applicable applications such as BMC Service Level Management, BMC Remedy Knowledge Management, and BMC Service Request Management.

Table 58: Foundation data modified by the data wizard

Data administration type	Fields containing the value	Required filters to find the correct value
Company	Company	None
Person name	■ First Name ■ Middle Name ■ Last Name ■ Full Name	■ Company ■ Person ID ■ Login ID **Note:** Login ID is a required filter only if the person has a Login ID

Data administration type	Fields containing the value	Required filters to find the correct value
Login ID	■ Login ID ■ Submitter ■ Last Modified By ■ Any field that holds a login ID value	None
Generic categorization	■ Generic Categorization Tier 1 ■ Generic Categorization Tier 2 ■ Generic Categorization Tier 3	Category Type (required information)
Operational categorization	■ Operational Categorization Tier 1 ■ Operational Categorization Tier 2 ■ Operational Categorization Tier 3	None
Product categorization	■ Product Categorization Tier 1 ■ Product Categorization Tier 2 ■ Product Categorization Tier 3 ■ Product Name ■ Manufacturer	None

Data administration type	Fields containing the value	Required filters to find the correct value
Product model and version	Product Model/Version	■ Product Categorization Tier 1 ■ Product Categorization Tier 2 ■ Product Categorization Tier 3 ■ Product Name ■ Manufacturer
Site	Site	None
Site information	■ Street ■ Country ■ State/Province ■ City ■ Zip/Postal Code ■ Time Zone	Site
Support group	■ Support Organization ■ Support Group Name	Support Company

The data wizard does not update the BMC Service Level Management terms and conditions qualification. You must use BMC Remedy User to manually update fields in the forms shown in Table 59 on page 241.

Table 59: BMC Service Level Management conditions and qualification forms

Form name	Form alias	Field name	Field ID
SLM:RuleCondition	SLM Condition Template	Condition	500068600
SLM:ServiceTarget	Service Target	TermsandConditions	300271400
HPD:HPDSLM:Qualbuilder	Qualification Builder	Qualification	300271400
CHG:CHGSLM:Qualbuilder	Qualification Builder	Qualification	300271400
AST:ASTSLM:Qualbuilder	Qualification Builder	Qualification	300271400

Using BMC Remedy User to update the conditions and qualification forms

To use BMC Remedy User to update the conditions and qualification forms

1 Open one of the forms in search mode.

2 Search for the records to modify.

Use the Advanced Search Bar to find records that meet the following criteria:

'Name*' LIKE "SLM00101_TC%"

3 Open the record in modify mode and change the appropriate Terms and Conditions fields.

For the HPD:HPDSLM:Qualbuilder, CHG:CHGSLM:Qualbuilder, and AST:ASTSLM:Qualbuilder forms, modify the Qualification (3002714000) field by changing the values of individual fields, and then click Save.

For example, open a record in the HPD:HPDSLM:Qualbuilder form in modify mode and change the value of the Product Categorization Tier 1 field by selecting a value from the field list or by typing in the field. When you click **Save**, the Qualification (3002714000) field is updated.

4 Click **Save**.

5 Repeat steps 1 through 4 for each of the five forms listed in Table 59 on page 241.

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