



ITSM Automation NG Express

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User Guide

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This section describes how to use the ITSMA suite capabilities.

- [Log in to ITSMA](#)
- [Access ITSMA capabilities](#)
- [Survey](#)
- [Chat](#)
- [Email](#)
- [Access the ITSMA documentation](#)

For information about how to use the Suite Configuration capability, see [ITSMA suite administration](#).

Log in to ITSMA

Once the ITSMA suite is successfully deployed, users can log in to ITSMA using one of the following URLs:

- Non-ESS user URL:

https://<master node FQDN>/main

This URL provides access to all ITSMA capabilities: Service Portal, Service Management, CMDB, UCMDDB Browser, and Suite Control.

It is designed for non-self-service users, such as the suite administrator (sysadmin), IT agents, Service Management system administrators, configuration managers, and CMDB system administrators.

- ESS user URL:

https://<master node FQDN>/ess

This URL provides access to Service Portal only.

It is designed for Employee Self-Service (ESS) users.

ESS-only users can only access Service Portal. Do not use ESS-only user accounts to log on to non-ESS user URL and access other capabilities.

The ITSMA user interface language supports multiple languages. For more information, see [Language support](#).

To log in to ITSMA, follow these steps:

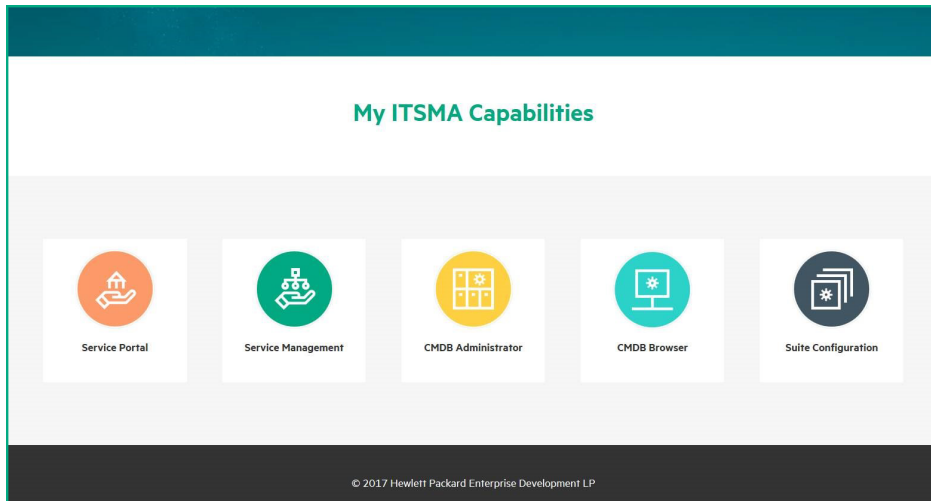
1. Launch one of the following URLs from your browser.
 - **https://<master node FQDN>/main**
 - **https://<master node FQDN>/ess**
2. On the login page, enter your user name and password.

In a test environment, if you are using the internal LDAP server, you can use the following sample user accounts pre-configured in the LDAP server: **falcon**, **kquan**, **sdapprover**, **Amy.Lopez**, and **Aaron.Caffrey**, whose passwords are all **123456**.

If you are a suite administrator, log in as the **sysadmin** user and the password configured during the suite installation (see [Run the Suite Installer](#)).

3. Click **Log In**.

The ITSMA landing page is displayed.
The following figure shows the landing page for non-ESS users.



Now, you can click the icons on the landing page to access the capabilities without the need to enter your user name and password again. For details, see [Access ITSMA capabilities](#).

Log out of ITSMA

To log out of ITSMA, click your avatar on the top right corner of the screen, and then select **Logout**.

Access ITSMA capabilities

The following table describes how you can access the capabilities from within the ITSMA suite UI and from a direct URL address. UI access assumes that you have already logged in to the suite. For information about how to log in to the ITSMA suite, see [Log in to ITSMA](#).

| Capability | UI access | Direct URL access | Intended users |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Service Management | On the suite landing page, click Service Management . You are directly logged in to the Service Manager. | <code>https://<master node FQDN>/webtier/index.do</code> | Non-ESS users |
| Service Portal | There are two interfaces for Service Portal: <ul style="list-style-type: none"> • End user portal: On the suite landing page, click Service Portal. You are directly logged in to Service Portal. • Management Console: Not accessible from the suite UI. | <ul style="list-style-type: none"> • End user portal: <code>https://<master node FQDN>/ess</code> • Management Console: <code>https://<master node FQDN>/propel/launchpad/org/Provider (user name/ password: admin/ propel)</code> | End user portal: ESS users Management Console: Service Portal administrator |
| CMDB Administrator | Two interfaces: <ul style="list-style-type: none"> • UCMDB: On the suite landing page, click CMDB Administrator. You are directly logged in to Universal CMDB (UCMDB). • JMX Console: Not accessible from the suite UI. | <ul style="list-style-type: none"> • UCMDB: <code>https://<master node FQDN>/ucmdb-ui/</code> • JMX Console: <code>https://<master node FQDN>/jmx-console</code> | CMDB Administrator <div style="border: 1px solid orange; padding: 5px;"> <p>In the out-of-box system, only sysadmin can access this capability. To enable other users to access CMDB, see Configure an external LDAP server.</p> </div> |

| | | | |
|----------------------------|----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>CMDB Browser</p> | <p>On the suite landing page, click CMDB Browser.</p> <p>You are directly logged in to the UCMDB Browser.</p> | <p><code>https://<master node FQDN>/ucmdb-browser</code></p> | <p>CMDB Administrator</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;"> <p>In the out-of-box system, only sysadmin can access this capability. To enable other users to access CMDB Browser, see Configure an external LDAP server.</p> </div> |
| <p>Mobility</p> | <p>Not accessible from the suite UI.</p> | <p>The Mobility capability provides two user interfaces:</p> <ul style="list-style-type: none"> • Administration interface (for the administrator): <code>https://<master node FQDN>/mobility/std</code> • End user interface (for end users) <code>https://<master node FQDN>/mobility/ess</code> | <p>Mobile users</p> |
| <p>Suite Configuration</p> | <p>On the suite landing page, click Suite Configuration.</p> | <p><code>https://<master node FQDN>/itsmaconfig</code></p> | <p>sysadmin only</p> |

Survey

The Survey functionality is based on the HTML Email solution (JavaMail) and does not require an external survey tool to complete the survey process. You can manually send individual surveys directly from a record to selected users, or configure the system to automatically send scheduled surveys to specified users through an out-of-box survey connector.

When users receive a survey link, they can directly open the link in a web browser and then log in to ITSMA to complete the survey. They can also check the surveys opened for them or closed by them in Service Portal. In the out-of-box system, Surveys are designed to achieve the following goals:

- Collect user satisfaction ratings on the following areas: the level of service provided, the speed of response that the user received, and the level of communication rating from 1 to 5 regarding the service.
- Collect additional comments from the user (if any)
- Allow the user to select if a complaint or compliment needs to be registered. If the user selects to do so, the system automatically generates an interaction record of a Complaint or Compliment category with the information the user provided, and sends an email to the user with information about the interaction record. The user can click the record link to check the record details and status.

Out of box, Survey is enabled in ITSMA:

- In Service Management, Service Portal is specified as the survey portal and the survey URLs are configured in the System Information Record (**Service Management > System Administration > Ongoing Maintenance > Miscellaneous > System Information Record**).
- In Service Management, a survey integration instance is enabled and running in Integration Manager (**Service Management > System Administration > Tailoring > Integration Manager**).
- Service Desk agents can manually send surveys to Service Portal users by using the **More > Send Survey** menu option in a record in Service Management, without the need for any additional configuration.
- Users can access and manage their surveys from the **Surveys** application in Service Portal.
- [Manually send a survey from Service Management](#)
- [Send scheduled surveys from Service Management](#)
- [Respond to a survey](#)
- [Check survey results](#)
- [Customize Survey](#)

Manually send a survey from Service Management

Once your administrator has set up HTML Email, you can manually send a survey from a record at any state in one of the following modules in Service Management:

- Interaction
- Request
- Incident
- Problem
- Change

- Configuration Item

To manually send a survey from a record, follow these steps:

1. Log in to ITSMA.
2. Click **Service Management**.
3. Open a record. For example, click **Service Desk > Search Interactions** to open an interaction record.
4. Click **More > Send Survey** to display the **Manual Customer Survey** interface.
5. In the **Survey Template** field, click Fill to select the appropriate survey template.

The Survey functionality provides an out-of-box sample survey template with sample questions. In a test environment, you can use this template for testing purposes.

6. Click Fill to select one or more recipients from the list.

If you manually enter recipients, auto-complete is supported for recipient names. If you enter an invalid recipient name, the recipient is skipped when you send the survey.

7. Click **Preview** to preview the survey before sending, and then click **Back**.
8. Click **Send**.
A confirmation dialog opens.
9. Click **Yes** to send the survey to the selected recipients.

The specified recipients receive an email notification, which contains a survey link and instructions on how to respond to this survey.

Send scheduled surveys from Service Management

To enable Service Management to automatically send scheduled surveys to predefined users, the survey administrator needs to configure scheduled surveys first in the system.

Scheduled surveys are based on a module in Service Management: Change, Configuration Item, Interaction, Incident, Request, and Problem.

To configure scheduled surveys for a module, follow these steps:

1. Log in to ITSMA. See [Log in to ITSMA](#).
2. Click **Service Management**.
3. Create a scheduled survey for a module. For details, see the [HPE Service Manager Help Center](#). The configured survey will be automatically sent to users that you configured in the scheduled survey when the survey is triggered.

Respond to a survey

When a survey is sent to you, you receive an email notification that contains a link to the survey. You can click the link to respond to the survey in Service Portal. Alternatively, you can directly locate the survey by opening the Surveys application from the Service Portal user interface and respond to it.

Currently, email notifications for scheduled surveys are not supported (see [Known issues, limitations, and workarounds](#)). Users can only check for such surveys from the Service Portal user interface.

For detailed steps to respond to a survey, in the Service Portal user interface, click your avatar and then select **Help**.

Check survey results

If you are an IT agent, you can check the results of the surveys that you sent out.

To view your survey results, follow these steps:

1. On the ITSMA landing page, click **Service Management**.
2. From the TO-DO queue, select **Internal Survey**.
3. Select the **All internal surveys created by me** view. The surveys are grouped into closed surveys and open surveys.
4. Open the closed surveys to view the results.

Customize Survey

Additionally, a Service Management administrator can tailor the Survey functionality, such as creating custom survey questions. For more information, see the following documents in the HPE Service Manager Help Center:

- [SM Survey administrator tasks](#)
- [SM Survey user tasks](#)

Chat

The Chat functionality is enabled in an out-of-box ITSMA system:

- From Service Management, IT agents (Service Desk agents) can start a conversation with one or more participants;
- From Service Portal, end users can start a conversation with a virtual IT agent (named "Sage") or a real IT agent, and submit a request if the conversation cannot solve the user's problem.

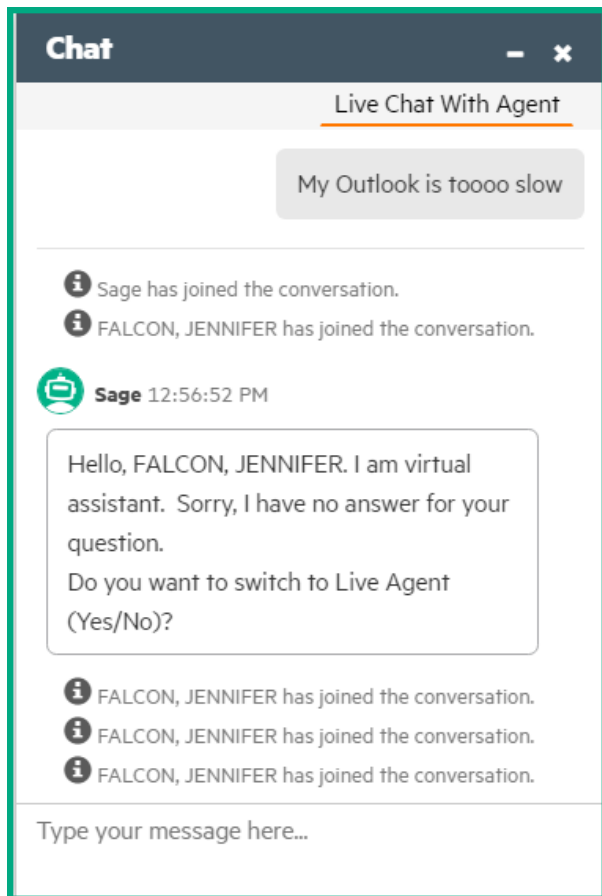
Additionally, administrators can customize the Chat functionality in ITSMA.

- [Start a chat conversation from Service Portal](#)
- [Start a chat conversation from Service Management](#)
- [Customize Chat](#)

Start a chat conversation from Service Portal

When you are working in Service Portal, a chat icon () is floating at the lower right corner of the screen. The chat process is as follows:

1. You click the icon to start a chat conversation.
2. Service Portal automatically connects to the chat server, and a virtual agent ("Sage") automatically joins the conversation.
3. Sage tries to find an answer to your question.
4. If Sage cannot find an answer to your question, you have the choice to chat with a real Service Desk agent (a "live agent").
5. If no live agent is available to chat with you or the live agent cannot solve your problem, you can click **Submit a Request** to log a case.



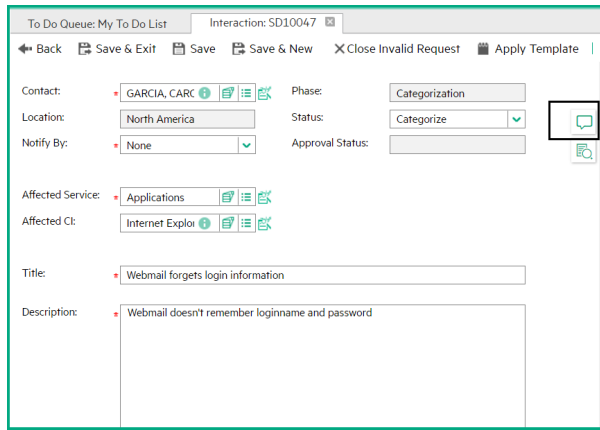
For detailed steps, click your avatar at the top right corner of the Service Portal UI and then select **Help**.

Start a chat conversation from Service Management

On the task bar at the top of the Service Management user interface, there is a chat icon. Next to the icon is a status indicator, which indicates if Service Management is connected to the chat server: green circle (connected) or red crossmark (disconnected). If Service Management is not connected to the chat server, you can click the icon to connect.



If Chat is available from a record, a chat icon is displayed on the far right of the record detail form. You can start a conversation by clicking this icon. In the chat box that opens, you can invite one or more participants to the conversation.



Customize Chat

An administrator can customize the default chat configurations from Service Management: **System Administration > Ongoing Maintenance > Collaboration**:

- Click **Configuration** to reconfigure **Maximum Participants Per Conversation** and **Notification Delay Time (Seconds)**.
- Click **Service Desk Chatbot** to edit the out-of-box Artificial Intelligence Markup Language (AIML) records or add new AIML records and then publish them.
- Click **Support List** to reconfigure suggested user fields for each supported module.

For more information about using Chat, refer to the Service Manager (Codeless) 9.52 Help Center available on the [HPE Software Documentation Portal](https://docs.software.hp.com). However, be aware that Chat in ITSMA does not support integration with Microsoft Skype.

Email

Once the suite administrator (the "sysadmin" user) has set up the outbound email solution (see [Configure Email](#)), Service Management can send emails to the external SMTP mail system that is configured.

Once you have configured email settings, Service Management automatically starts the **emailout.startup** background scheduler in **Miscellaneous > System Status**. This scheduler must be running in order to send outbound emails.

- [Manually send an outbound email](#)
- [Automatically send email notifications](#)

Manually send an outbound email

To manually send an email, follow these steps:

1. On the ITSMA landing page, click **Service Management**.
2. Navigate to **Miscellaneous > Service Manager Mail**.
3. Click **New Message**.
4. In the **To** field, enter one or more valid email addresses.
5. In the **Type** field, select **Email**.
6. Enter your subject and message body.
7. Click **Send**.

Service Management creates a record in the eventout table and emailout background scheduler will send the message to the specified recipients.

Automatically send email notifications

You can configure Service Management to send notifications whenever specific system events occur. By default, Service Management supports notifications for every type of status change event in all applications. You can also define custom notifications that Service Management sends when specific events occur.

For more information, see the **Notifications** section in the Service Manager (Codeless) 9.52 Help Center available from the [HPE Software Documentation Portal](#).

Access the ITSMA documentation

The ITSMA NG Express documentation set consists of the following subsets:

- [ITSMA NG Express Help Center \(this Help system\)](#)
- [Service Management Help Center](#)
- [Service Portal Help Center](#)
- [CMDB Help Center](#)
- [UCMDB Browser Help Center](#)

ITSMA NG Express Help Center (this Help system)

Where to access: [HPE Software Documentation Portal](#)

This help system provides the following information about the next-generation express edition of ITSMA:

- Release notes
- Overview
- Support matrix
- Installation instructions
- Simple guidelines on how to use ITSMA
- Troubleshooting information

This help system contains no detailed information about how to use each capability in the ITSMA suite. For such information, you need to refer to their specific help systems, which are listed in the following.

Service Management Help Center

Where to access: [HPE Software Documentation Portal](#)

This help system is not accessible for the Service Management user interface. The Service Management capability in this ITSMA release is based on HPE Service Manager (Codeless) version 9.52; for detailed information about how to use Service Management, you need to refer to the [Service Manager \(Codeless\) 9.52 Help Center](#).

Service Portal Help Center

Where to access: the Service Portal user interface (click your avatar on the upper right corner and then select **Help**).

Service Portal in ITSMA is based on Service Portal version 9.52. Be aware that this help system is role-based and context-sensitive. An administrator has access to both administration help and end user help information, and an end user has only access to end user help information.

CMDB Help Center

Where to access: the CMDB user interface (click your avatar on the upper right corner and then select **Help**).

The CMDB capability in ITSMA is based on HPE Universal CMDB (UCMDB) 10.32. When users click **Help** from the CMDB user interface, the UCMDB 10.32 Help Center opens.

UCMDB Browser Help Center

Where to access: the CMDB Browser user interface (click your avatar on the upper right corner and then select **Help**).

The UCMDB Browser capability in ITSMA is based on HPE UCMDB Browser version 4.13. When users click **Help** from the UCMDB Browser user interface, the UCMDB Browser 4.13 Help Center opens.

Send documentation feedback

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on ITSMA documents (ITSMA 201704)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to ovdoc-ITSM@hpe.com.

We appreciate your feedback!