



Get.Service!  
Quick Start Guide  
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***Get.It!***

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# Chapter 1

## Introduction



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Get.Service! is part of the Peregrine Systems® Get.It! suite of Employee Relationship Management applications. The Get.It! applications empower employees to order products and services directly through a corporate intranet via Web browsers. The user interface is role-based and you can tailor it to meet your needs.

An add-on module, PC Support, can be purchased to be used with Get.Service!. The PC Support module provides self-service and assisted-service capabilities for employees' PC problems. PC Support empowers employees to solve many of their own PC-related problems without help from a support organization. In those cases in which self-service does not provide an adequate solution, Get.Service! immediately escalates the incident to the support desk, and automatically includes all of the diagnostic information that was collected during the self-service process within the problem ticket. The IT support staff can then refer to this detailed information to further diagnose and resolve the issue. The PC Support module also includes tools that enable the support staff to remotely interrogate, diagnose, and repair PC-related problems.

## Get.Service! Features

Get.Service! is a webapplication (an application that runs on the Web), which provides users the ability to open problem tickets when they need help with any problem in their work environment. The ticket opened in Get.Service! is then stored in the ServiceCenter database and can be viewed from either Get.Service! or ServiceCenter.

Tickets can also be updated and closed from Get.Service!. The revised ticket is then updated in ServiceCenter.

The file attachment feature is not available with ServiceCenter Service Management call tickets.

Files such as MS Excel spreadsheets or MS Word documents can be attached to a Get.Service! ticket, providing additional information to the support staff processing the ticket. These files are stored with the ticket on the server. Information about the file attachment feature is included in Chapter 3, "Data Reference."

Figure 1.1 shows the form for opening a new ticket in Get.Service!.

The screenshot shows the Get.Service! web application interface. On the left is a navigation menu with options like Home, Get2Connect.net, Admin, Create a Request, Check Request Status, Approve Requests, Receiving, and Service (with sub-options like Check Status, Report Problem, Check Problem History). The main content area has a header with 'USER : Hartke' and 'Project: service\_service\_report\_describeProblem'. Below the header is a text prompt: 'Please tell us about your problem and provide the information requested here to properly process the report.' This is followed by a text input field labeled 'Please describe the problem:'. Below that is a section for contact information: 'Please enter contact information for this problem:'. This section contains fields for 'First name: Richard', 'Last name: Hartke', 'Phone:', and 'Email: party@peregrine.com'. There is also a 'Lookup:' field with a magnifying glass icon. Below the contact information is a section for file attachments: 'Add file attachments:'. This section has a dropdown menu labeled 'Attachments: - Select a file -' and icons for adding, deleting, and searching files. At the bottom of the form is a blue 'Submit' button. The browser's address bar shows 'Local intranet'.

Fig. 1.1 Get.Service! new ticket form

You can bookmark a Get.Service! page as you would any other Web page. With the page you want to bookmark displayed, right-click in the frame you want to return to and select **Add to Favorites**.

You can also send a coworker an HTTP link to a page—for example, someone in support may want to ask someone else to look at a particular ticket. The link would be something like:

[http://webserver/getit/e\\_service\\_status\\_whichone.jspld=PM10002](http://webserver/getit/e_service_status_whichone.jspld=PM10002)

If the user is logged in to Get.Service!, clicking on the link will take them to the designated page. If the user is not logged in, the login screen will be displayed, and after the user has logged in, the requested page will be displayed.

## Architecture Overview

Refer to the *Get.It! Quick Start Guide* for detailed information about the Get.It! architecture.

Get.Service! interfaces with the Problem Management module of ServiceCenter (Incident Management in ServiceCenter 4.0). Access to the database is provided through the SCAdapter. User rights are established for the various tasks available in Get.Service! by means of capability words in the user's operator record in ServiceCenter.

Get.Service! can also be configured to use the Service Management module of ServiceCenter. Instructions for doing this are included in Chapter 2, "Administration and Security."

To use Get.Service! with ServiceCenter, you will need to load the ServiceCenter files provided with the Get.It! installation and update the `archway.ini` file. Instructions are included in Chapter 2 of the *Get.It! Quick Start Guide*.

## About this Guide

This guide is designed to be used by administrators configuring and maintaining the Get.Service! webapplication.

To use this guide effectively, you should have a working knowledge of the following:

- XML and ECMAScript (or JScript/JavaScript)
- Operating guides, reference manuals, and other documentation for your PC hardware and operating system
- ServiceCenter administration and functionality
- JRun documentation located in the `...JRun\docs` directory

## Related Documentation

This guide should be used in conjunction with the *Get.It! Quick Start Guide*. For tailoring information and instructions for using Get.It! Studio, refer to the *Get.It! Studio Introduction* and the *Get.It! Tailoring Guide*.

## Organization of the Guide

The following table tells the parts of this guide to look in to find the information you need.

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<b>To Find This</b>	<b>Look Here</b>
Get.Service! features; how to use this guide.	Chapter 1, "Introduction."
Security, user rights; configuring Get.Service! to use Service Management; Personalization access rights.	Chapter 2, "Administration and Security."
How to use the file attachment feature.	Chapter 3, "Data Reference."

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## Conventions Used in this Guide

Screen shots in this guide are included as examples only. Screens are shown using the Get.It! Classic stylesheet.

The following documentation conventions are used in this guide:

Object	Font	Example
Button	New Century Schoolbook Bold	Click <b>Next</b>
File name	Arial Bold	The <b>login.asp</b> file
Sample script or XML code	Courier New	<pre>var msgTicket = new Message( "Problem" );  ... msgTicket.set( "_event", "epmc" );</pre> <p>The ellipsis ( . . . ) is used to indicate that portions of a script have been omitted because they are not needed for the current topic. Samples of code are not entire files, but they are representative of the information being discussed in a particular section.</p>
Book title	New Century Schoolbook Italic	Refer to the <i>Get.It! Quick Start Guide</i> .
Menu option	New Century Schoolbook Bold	Select <b>Start&gt;Program Files</b> .



# Chapter 2

## Administration and Security

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This chapter includes information about how users are authenticated in Get.Service!. It also includes procedures for configuring Get.Service! to use the ServiceCenter Service Management module.

It is recommended that you refer to the *Get.It! Quick Start Guide* for information about general Get.It! administrative tasks in conjunction with reading this guide.

**Note:** Incident Management is called Problem Management in ServiceCenter versions prior to 4.0. Some parameters in Incident Management use *problem* terminology because they are mapped to *problem* tables in ServiceCenter.

### User Identification and Authentication

This section includes information about how users are authenticated in ServiceCenter and how passwords can be secured.

### ServiceCenter Password Security

The ServiceCenter parameter, `securepassword`, can be set in the ServiceCenter `sc.ini` file to prevent advanced users from submitting a Get.Service! query that will return a list of user passwords. It is recommended that you set this parameter in ServiceCenter in the following manner:

1. Open the `sc.ini` file in a text editor.
2. Add the parameter, `securepassword`, to the file, and save the file.

A request for a list of passwords in Get.Service! will now return a list with the passwords masked.

## ServiceCenter Capability Words

When you log in to Get.Service!, your user name and password are validated against your operator record in ServiceCenter. Each user must have a user name and the appropriate capability words defined in their operator record in ServiceCenter.

Users can also register themselves in Get.Service!, and default operator and contact records will be created in ServiceCenter. For instructions on how to register as a new user in Get.It!, refer to Chapter 6 of the *Get.It! Quick Start Guide*.

## Configuring Get.Service!

This section lists parameters that are specific to Get.Service!. These settings can be changed on the Get.Services! tab of the Admin Settings form. The field names on the form for Incident or Problem Management are defined by the version of ServiceCenter you are using.

The Incident/Problem Management section includes settings that apply to the Incident/Problem Management module in ServiceCenter. This is the default module used for tickets opened in Get.Service!.

The Service Management section includes settings that can be defined if you also want to use the Service Management module in ServiceCenter.

## ServiceCenter 3.0x Settings

### *Service Management*

You can configure Get.It! to add the Service Management module so that you can open and view both Problem tickets and Call tickets. To do this, change the Service Management setting on the Get.Service! tab to *Enabled*. You can then change the other parameters as needed.

<b>Admin Settings Field</b>	<b>Default Setting</b>	<b>Description</b>
Service Management	Disabled	If set to Enabled, enables Service Management so that tickets created in Get.Service! are opened using the Service Management module of your ServiceCenter installation.

<b>Admin Settings Field</b>	<b>Default Setting</b>	<b>Description</b>
Default Category for Service Management	example	The default ServiceCenter category for Call tickets. This parameter is used only if Service Management is enabled.
Default Severity for Service Management	(none)	The default Severity to be used when creating Call tickets. This parameter is used only if Service Management is enabled.

### ***Problem Management***

The following parameters can be modified to configure the default settings that will be used by Problem Management when a user opens a Get.Service! ticket.

<b>Admin Settings Field</b>	<b>Default Setting</b>	<b>Description</b>
Default Category for Problem Management	example	Defines the default ServiceCenter category for Problem tickets.
Default Subcategory for Problem Management	(none)	The default Subcategory to be used when creating Problem tickets.

## **ServiceCenter 4.0 Settings**

### ***Service Management***

You can configure Get.It! to add the Service Management module so that you can open and view both Incident tickets and Call tickets. To do this, change the Service Management setting on the Get.Service! tab to *Enabled*. You can then change the other parameters as needed.

<b>Admin Settings Field</b>	<b>Default Setting</b>	<b>Description</b>
Service Management	Disabled	If set to Enabled, enables Service Management so that tickets created in Get.Service! are opened using the Service Management module of your ServiceCenter installation.

<b>Admin Settings Field</b>	<b>Default Setting</b>	<b>Description</b>
Default Category for Service Management	example	The default Category to be used when creating Call tickets. This is used only if Service Management is enabled.
Default Subcategory for Service Management	tbd	The default Subcategory to be used when creating Call tickets. This is used only if Service Management is enabled.
Default Problem Type for Service Management	tbd	The default Problem Type to be used when creating Call tickets. This is used only if Service Management is enabled.
Default Product Type for Service Management	tbd	The default Product Type to be used when creating Call tickets. This is used only if Service Management is enabled.
Default Severity for Service Management	Low	The default Severity to be used when creating Call tickets. This is used only if Service Management is enabled.
Default Site Category for Service Management	A	The default Site Category to be used when creating Call tickets. This is used only if Service Management is enabled.

### ***Incident Management***

The following parameters can be modified to configure the default settings that will be used by Incident Management when a user opens a Get.Service! ticket.

<b>Admin Settings Field</b>	<b>Default Setting</b>	<b>Description</b>
Default Category for Incident Management	example	The default Category to be used when creating Incident tickets.
Default Subcategory for Incident Management	tbd	The default Subcategory to be used when creating Incident tickets.
Default Problem Type for Incident Management	tbd	The default Problem Type to be used when creating Incident tickets.
Default Product Type for Incident Management	tbd	The default Product Type to be used when creating Incident tickets.

<b>Admin Settings Field</b>	<b>Default Setting</b>	<b>Description</b>
Default Severity for Incident Management	3	The default Severity to be used when creating Incident tickets.
Default Site Category for Incident Management	A	The default Site Category to be used when creating Incident tickets.

## Service Management User Interface Changes

The following interface changes occur when Service Management is used with Get.Service!:

- The file attachment feature is not supported with Service Management. Therefore, the file attachment buttons and drop-down list are not displayed on Call tickets.
- Status activity displays all Call tickets as well as Problem/Incident tickets whose status is not “Closed.” The Problem/Incident tickets and Call tickets are displayed in a separate field on the screen.
- When using the “Report a Problem” function, a Call ticket is created in ServiceCenter.
- A Check History screen is added, which displays Call tickets as well as Problem/Incident tickets whose status is equal to “Closed”.

## Using the Admin Module

Updates to the `archway.ini` file are easily accomplished using the Get.It! Admin module, as shown in Figure 2.1.

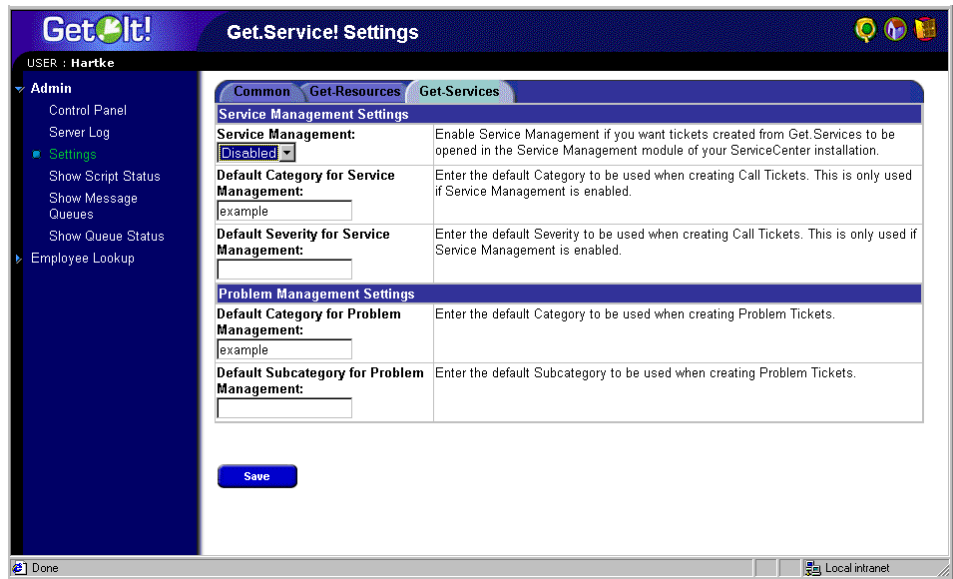


Fig. 2.1 Admin Settings—Get.Service! tab

After you have updated the Admin settings, scroll to the bottom of the screen, and then click **Save**. The Control Panel will be displayed so that you can reset the server. Refer to the *Get.It! Quick Start Guide* for detailed instructions on using the Admin module.



## Personalization Access Rights

The Personalization feature in the Get.It! weblications enables a user to tailor the weblication screens without manually changing and compiling code. Instructions for using Personalization are included in the *Get.It! Tailoring Guide*. However, there are several administrative tasks that can allow or deny access to Personalization.

## Personalization Hierarchy

Configuration of Personalization is defined in a hierarchy of user access.

Typically, an administrator would use personalization to configure the contents and features of various screens, making the settings standard and default for all users of the system. In many organizations, this is the only type of personalization that may be enabled.

It is also possible to establish specific settings that apply to different groups of users in the organization. For instance, users in the IT department may see a Product screen that has more details than users in other departments.

Finally, it is also possible to allow individual users to further customize their screens in addition to any default customization done at the global and departmental levels.

This personalization hierarchy is defined by an ECMAScript invoked for each user when they log into the system. The job of the script is to return a string showing the hierarchy for each user. For instance, consider a user named Hartke who works in the IT department. The user's hierarchy could be defined as follows:

```
/admin/IT/hartke
```

This tells the Personalization system to provide user Hartke with all personalization settings defined at the admin level, plus any settings defined at the IT level. Finally, any personal settings are stored at the "hartke" user level.

The default implementation is defined in the `personalize.getHierarchy` script. This script defines two levels of Personalization:

- `admin`—this level is given to any user who has `getit.admin` or `getit.personalization.admin` rights.
- `/admin/<user>`—this level is given to all other users. Any settings defined at the `/admin` level are inherited, and any new changes are stored separately for each user.

This default scheme can be changed by tailoring the `personalize.getHierarchy` script as necessary.

## User Personalization Rights

The personalization features rely on specific user rights in order to be enabled. These roles are:

**getit.personalization**—If defined, the user is classified as a Personalization End User. This is the default setting for all users. These users have access rights as defined by the **personalizeaccess** setting, which can be set to one of the following:

- Disabled – The end user operates with personalization settings defined by the administrator but has no rights to make changes.
- Enabled – The end user inherits default personalization settings, but also has access to add or remove fields to their screens.
- Limited – The end user inherits default personalization settings and has access to make changes. However, the changes are limited by the settings defined by the administrator—schema fields not included by the administrator are not available to the end user. In addition, the user is not allowed to make read-only fields editable.

**getit.personalization.admin** – If defined, the user is classified as an administrator and is given special rights, including:

- The ability to define whether DocExplorer supports update, create, and delete operations.
- The ability to define settings that are inherited by all users.

## Personalization Database

Personalization settings are stored in a database repository and processed at run time when a user logs on to the system. The storage is performed through an adapter target named **weblication**.

To enable personalization, the weblication name must be mapped to a valid adapter in the **archway.ini** adapters section.

For example:

```
adapters=weblication=SCAdapter
```

This maps Personalization storage to the SCAdapter, causing the data to be stored in the ServiceCenter database.

The storage of settings is performed using the **webDocExplorer** schema defined in the Get.It! Studio **studio** package. Currently, there are mappings of this schema for AssetCenter and ServiceCenter.

In ServiceCenter, the schema is mapped to the giComponentUsers table, with a corkboard.name key of the form “personalize”. If you need to move personalization settings from one database to another, unload these records and load them into the second system.



# Chapter 3

## Data Reference

### File Attachments

Get.Service! provides functionality that allows users to attach files (for example, a Microsoft Excel or Word file) to Get.Service! requests to provide additional information.

During the installation of Get.It!, an attachments virtual directory was created in the presentation directory. However, as a security safeguard to your system, it is recommended that you change the permissions on the attachments virtual directory.

The procedure below uses Internet Information Services (IIS) as an example.

3. Open IIS.
4. In the getit directory, right-click on the attachments directory, and then choose **Properties**.

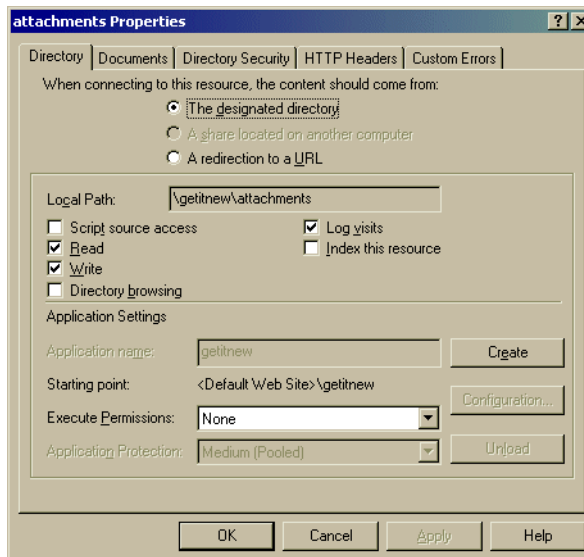


Fig. 3.1 Attachments Properties

5. Set the permissions to *Read* and *Write*.
6. Click **OK**.

#### ***Archway.ini Parameters***

The File Attachment functionality uses defaults that can be overridden by the following parameters in the **archway.ini** file. These parameters allow you to set the paths for the file attachments and to establish a maximum allowable size for the attachment.

<b>Parameter</b>	<b>Description</b>
attachvirpath	Sets the Web directory reference from which files will be drawn for viewing. The default is /getit/attachments/ if not set in the <b>archway.ini</b> file.
attachserverpath	Sets the physical path on the Web server where the files will be stored. The default is <getit home>\presentation\attachments\ if not set in the <b>archway.ini</b> file.
attachmaxsize	Establishes the maximum size in KB for an attached file. The default is 2048 KB (2 MB).



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