



ITSM Automation NG Express

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User Guide

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Use

This section describes how to use the ITSMA suite capabilities.

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

Log in to ITSMA

This section describes the login and logout steps for ITSMA running in fully containerized mode and mixed mode.

Language support

The ITSMA user interface supports multiple languages. For more information, see [Support matrix \(on-premises\)](#).

- [Fully containerized mode](#)
- [Mixed mode](#)

Fully containerized mode

In this mode, all containerized services are installed and accessible from the suite user interface.

Login

To log in to ITSMA, follow these steps:

1. Launch one of the following URLs from your browser.
 - Non-ESS user URL:
https://<EXTERNAL_ACCESS_HOST>/main
This URL provides access to all ITSMA capabilities: Service Portal, Service Management, CMDB, CMDB Browser, and Suite Configuration. 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.

Do not let ESS users log on to the non-ESS user URL and access other capabilities. Additionally, if SAML SSO is enabled, the **sysadmin** user must use the following login URL: https://<EXTERNAL_ACCESS_HOST>/itsmaconfiglogin. For more information, see [Configure SAML SSO](#).

- ESS user URL:
https://<EXTERNAL_ACCESS_HOST>/saw/ess
This URL provides access to Service Portal only. It is designed for Employee Self-Service (ESS) users.
2. On the login page, enter your LDAP user name and password.

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

If you are a suite administrator, you can log in as the **sysadmin** user using 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 (fully containerized).



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](#).

Logout

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

If SAML SSO is enabled, when sysadmin logs out of the https://<EXTERNAL_ACCESS_HOST>/itsmaconfiglogin URL, the ADFS login page is displayed. The sysadmin user must click the **Back** button in the browser to log in again. This is a known issue in ITSMA.

Mixed mode

In mixed mode, the suite landing page (https://<EXTERNAL_ACCESS_HOST>/main) is not available. Users log in to ITSMA directly through a capability specific URL.

- Service Management: https://<EXTERNAL_ACCESS_HOST>/webtier (for IT agents)
- Suite Configuration: https://<EXTERNAL_ACCESS_HOST>/itsmaconfig (for the **sysadmin** user only)

SAML SSO login URL for sysadmin

If SAML SSO is enabled, the **sysadmin** user can only use the https://<EXTERNAL_ACCESS_HOST>/itsmaconfiglogin URL instead to log in to ITSMA. For more information, see [Configure SAML SSO](#).

- Service Portal: https://<EXTERNAL_ACCESS_HOST>/saw/ess (for ESS users)

Users log out of ITSMA by logging out of these components.

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 Admin Help Center](#)
- [CMDB Help Center](#)
- [CMDB 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 Admin Help Center

Where to access: the Service Portal admin interface: https://<EXTERNAL_ACCESS_HOST>/propel/launchpad (click your avatar on the upper right corner and then select **Help**).

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) 10.33. When users click **Help** from the CMDB user interface, the UCMDB 10.33 Help Center opens.

CMDB 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.

Access ITSMA capabilities

Users access ITSMA capabilities in different ways depending on the deployment mode: fully containerized mode, or mixed mode. To learn more about the deployment modes, see [Deployment modes](#).

The following table describes how you can access the capabilities from within the ITSMA suite UI and from a direct URL address.

- UI access is available only when ITSMA is running in fully containerized mode. In mixed mode, because there is no suite landing page, users can only use URLs.
- The methods for accessing the Service Management and CMDB capabilities are not applicable to the mixed mode scenarios when SM and CMDB are installed outside of the containerized environment.
- For information about how to use the capabilities, refer to their specific documentation. See [Access the ITSMA documentation](#).

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.	<a href="https://<EXTERNAL_ACCESS_HOST>/webtier/index.do">https://<EXTERNAL_ACCESS_HOST>/webtier/index.do	Non-ESS users (IT agents and administrators) <div style="border: 1px solid green; padding: 5px;">Service Management administrators must use a Windows client to perform content upgrade and tailoring tasks in Service Management. For details, see Access Service Management from a Windows client.</div>

Service Portal	<p>There are two interfaces for Service Portal:</p> <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. • Service Portal administration portal: On the suite landing page, click Suite Configuration, and then click Operation > Service Portal Administration. 	<ul style="list-style-type: none"> • End user (ESS) portal: <code>https://<EXTERNAL_ACCESS_HOST>/saw/ess</code> • Service Portal Administration: <code>https://<EXTERNAL_ACCESS_HOST>/propel/launchpad</code> 	<p>End user portal: ESS users</p> <p>Service Portal administration portal: sysadmin only</p>
<p>CMDB Administrator</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>This capability is also referred to as "CMDB" in the ITSMA documentation.</p> </div>	<p>Two interfaces:</p> <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://<EXTERNAL_ACCESS_HOST>/ucmdb-ui/</code> • JMX Console: <code>https://<EXTERNAL_ACCESS_HOST>/jmx-console</code> 	<p>CMDB Administrator</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> • 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. • CMDB must run in Internet Explorer for Java support. </div>
CMDB Browser	<p>On the suite landing page, click CMDB Browser.</p> <p>You are directly logged in to the UCMDB Browser.</p>	<code>https://<EXTERNAL_ACCESS_HOST>/ucmdb-browser</code>	<p>CMDB Administrator</p> <div style="border: 1px solid black; padding: 5px;"> <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>
Legacy mobility client	Not accessible from the suite UI.	<p>The Mobility capability provides two user interfaces:</p> <ul style="list-style-type: none"> • Administration interface (for the administrator): <code>https://<EXTERNAL_ACCESS_HOST>/mobility/std</code> • End user interface (for end users) <code>https://<EXTERNAL_ACCESS_HOST>/mobility/ess</code> 	Mobile users
Native mobile app	N/A	N/A	<p>Mobile users</p> <p>This is a new mobility solution for ITSMA, and designed to replace the legacy mobility solution.</p>
Suite Configuration	On the suite landing page, click Suite Configuration .	<p><code>https://<EXTERNAL_ACCESS_HOST>/itsmaconfig</code> (if SAML SSO is not enabled)</p> <p><code>https://<EXTERNAL_ACCESS_HOST>/itsmaconfiglogin</code> (if SAML SSO is enabled)</p>	<p>sysadmin only</p> <p>For more information, see Configure SAML SSO.</p>

Access Service Management from a Windows client

ITSMA does not include a Windows client for accessing Service Management. As a Service Management administrator, you can perform most of the administration tasks by using the web tier client (`https://<EXTERNAL_ACCESS_HOST>/webtier`). However, if you want to perform content upgrades, design forms and work with the dbdict utility and use other tailoring capabilities that are not available to web client users, you must use a Windows client.

ITSMA Service Management is based on HPE Service Manager 9.52, and therefore you can access Service Management from a Service Manager 9.52 Windows client.

To access Service Management from a Windows client, follow these steps:

1. Download the Service Manager 9.52 Windows client from the [HPE Software Entitlement Portal](#).

If you have an ITSMA suite license, you are entitled to download and use this Windows client for free.

2. Install the Windows client. For details, see [Install the Service Manager Windows Client](#).
3. Launch the Windows client. The Connections dialog appears.
4. Create a connection to the containerized Service Management Server by providing the following information on the **Connection** and **Advanced** tabs.

Connection tab

Option	Default value	Definition
Name	New_configuration	Type the name of this connection.
Use Login/Password	Enabled	When this option is enabled, ITSMA Service Management uses the login name and password information defined in the Connection dialog to create a client/server session.
Use Trusted Sign-on	Disabled	When this option is enabled, ITSMA Service Management uses the login name and password information defined in a trusted authentication source, such as Windows Integrated Authentication, to connect to the server. <div style="border: 1px solid yellow; padding: 5px; margin-top: 10px;">This feature is not supported for the ITSMA suite.</div>
User name	Windows user name	Type your user name to log on to the named server.
Password	None	Type your password to log on to the named server.
Remember my password	Disabled	Select this option to log on automatically without retyping your user information each time.
Automatically login	Disabled	Select this option to log on automatically when you start the Service Management client.
Server host name	localhost	Type the name of the Service Management server. This must be the FQDN that is defined in the <i>EXTERNAL_ACCESS_HOST</i> parameter in the CDF installation configuration file (see CDF installation configuration).
Server port number	13080	Enter 31181 , which is the port assigned to the Service Management server.
Language	None	Choose the language to use for this session. You may want to create session connections in multiple languages if you work with international customers.

Connection identified by a color	Disabled	This option enables you to assign a different color to each connection. By default, all client connections have the same background color as your Windows text editor.
Connection color	None	Choose a standard or custom color from the color palette. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>A custom color can improve the contrast or identify multiple connections. Lighter colors improve the readability of the forms.</p> </div>

Advanced tab

Option	Default value	Definition
Compress SOAP messages	Enabled	When this option is enabled, SOAP messages are compressed by using GNU zip (gzip) encoding. Gzip works similarly to WinZip™, a compression utility for Windows.
Use SSL Encryption	Disabled	Keep this option unselected.
Trace SOAP traffic	Disabled	When this option is enabled, the client logs SOAP messages.
Connect to External Load Balancer	Disabled	You must enable this option to connect to the containerized Service Management Server.

5. Click **Apply**, and then click **Connect**.

Service Portal

The Service Portal provides one centralized location for all employee issues related to IT. Its easy-to-use interface enables users to independently request and track support and service requests, search for a knowledge article, and browse a service catalog.

The portal's sophisticated search capabilities enable users to independently find relevant information. Search results are gathered from multiple sources and can include multimedia-rich articles, relevant services and forms, and targeted support – all displayed in one, user-friendly interface.

Category tiles

On the Service Portal, when a user clicks on a category tile, a page is displayed with three tabbed sections:

- Featured - displaying news, recommended & popular offerings, and articles
- Offerings - displaying all offerings belong to the category
- Articles - displaying relevant news and articles

The category page also includes an enhanced search drop-down option, allowing the user to search the selected category or all categories.

Shopping cart

ITSMA suite provides a shopping cart system for users in the Service Portal to collect and submit requests for multiple goods and services. As each item is added to or removed from the cart, the total number of items is updated and displayed beside the cart image. The user can click the cart image to edit or remove items, change item quantity, and to submit them.

Request on behalf

To make a request on behalf of another person:

1. On Service Portal main page, click the menu button



at the top right of the page.

2. Click **Request on behalf**.
3. Select a person from the drop-down list.

When a user in the Service Portal makes a request on behalf of another person, this has the following effects:

- Ideas do not display
- Requests that display are those of the user
- Offering availability is according to the entitlement rules applicable to the other person
- Prices (if any) display according to the entitlement rules as applicable to the other person
- Carts and their requests are submitted in the name of the other person

Survey

ITSMA supports two deployment options: ITSAM-SM and ITSMA-X. ITSMA-SM uses the survey mechanism offered by Service Management, and ITSMA-X uses its own survey mechanism.

If you are using ITSMA-SM

See the ITSMA Service Management Help Center for information about how to use Survey. For example, find information about the following tasks:

- Manually send a survey from Service Management
- Send scheduled surveys from Service Management
- Respond to a survey
- Check survey results
- Customize Survey

If you are using ITSMA-X

See the ITSMA-X Help Center (for ITSMA-X) for details.

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.

Prerequisite - enable outbound email

To enable users to receive survey notifications, a Service Management administrator needs to enable outbound email in Service Management. For information about how to enable outbound email in the containerized Service Management and a non-containerized Service Manager system, see [Configure Email](#) and your specific Service Manager help center, respectively.

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 in Service Portal.

Click the following links for more information.

- [If you are using ITSMA-SM](#)
- [If you are using ITSMA-X](#)
- [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 Service Management:
https://<EXTERNAL_ACCESS_HOST>/webtier
2. Open a record. For example, click **Service Desk > Search Interactions** to open an interaction record.
3. Click **More > Send Survey** to display the **Manual Customer Survey** interface.
4. 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. You can use this template for testing purposes.

5. 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.

6. Click **Preview** to preview the survey before sending, and then click **Back**.
7. Click **Send**.

A confirmation dialog opens.

8. 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.

When running in mixed mode, ITSMA cannot send out email notifications for scheduled surveys.

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 Service Management:

https://<EXTERNAL_ACCESS_HOST>/webtier

2. Create a scheduled survey for a module. For details, see the [HPE Service Manager Help Center](#).
3. 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. You can also locate an open survey from your To-Do list after logging in to Service Portal and then click **TAKE SURVEY** to directly respond to it.

Currently, when ITSMA is running in mixed mode, email notifications for scheduled surveys are not supported. Users can only check for scheduled surveys from the Service Portal user interface.

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. Log in to ITSMA Service Management:
https://<EXTERNAL_ACCESS_HOST>/webtier
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

For more information about using Chat, refer to the [Service Manager 9.52 Collaboration user guide](#). However, be aware that Chat in ITSMA does not support integration with Microsoft Skype.

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 IT agents.

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

End users can start a chat conversation in Service Portal using either of the following ways if the chat service is available in the suite and live chat is enabled in Service Portal feature settings:

- Click



in the top ribbon to start a chat conversation

- Click



on an open request detail page to start a chat conversation regarding a specific request

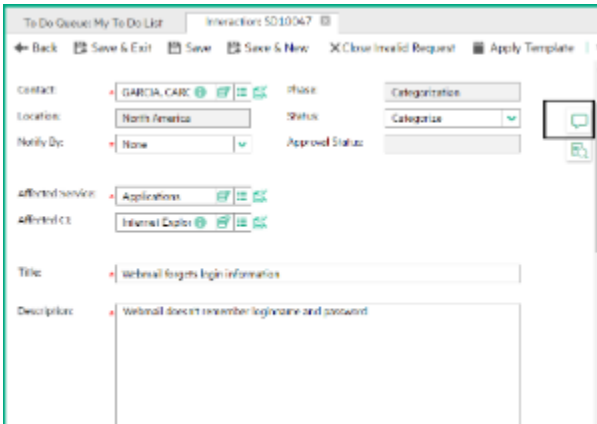
You are directed to a new request form if no agents join the conversation in 5 minutes.

Start a chat conversation from Service Management

IT agents can 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**. You can click **Configuration** to reconfigure **Maximum Participants Per Conversation** and **Notification Delay Time (Seconds)**.

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](#).

ITSMA Service Portal mobile app

This ITSMA Service Portal mobile app enables users to perform the following daily tasks from an Android mobile device:

- Search for service or support offerings, knowledge articles, and news
- Create new service or support requests
- Approve or deny requests
- Accept or reject resolved requests
- Respond to request surveys
- Browse the service or support offerings

Limitations

The current release of the mobile app has the following limitations:

- You cannot upload an attachment when submitting a request.
- The user option value for a service or support offering will not be displayed in the details of the submitted request.

- Installation
- Setup
- Activation
- Login
- To-do card
- Search
- Recent offerings and popular items
- Browsing categories
- Entry of a new request
- Notification
- Submit the ticket

Installation

You can install the ITSMA Service Portal mobile app from either of the following URLs:

- Google Play: <https://play.google.com/store/apps/details?id=com.mf.itsma.mobile.app>
- HPE Marketplace: <https://marketplace.saas.hpe.com/itom/content/itsma-containerized-suite-2017-07-express-edition>



ITSMA Service Portal

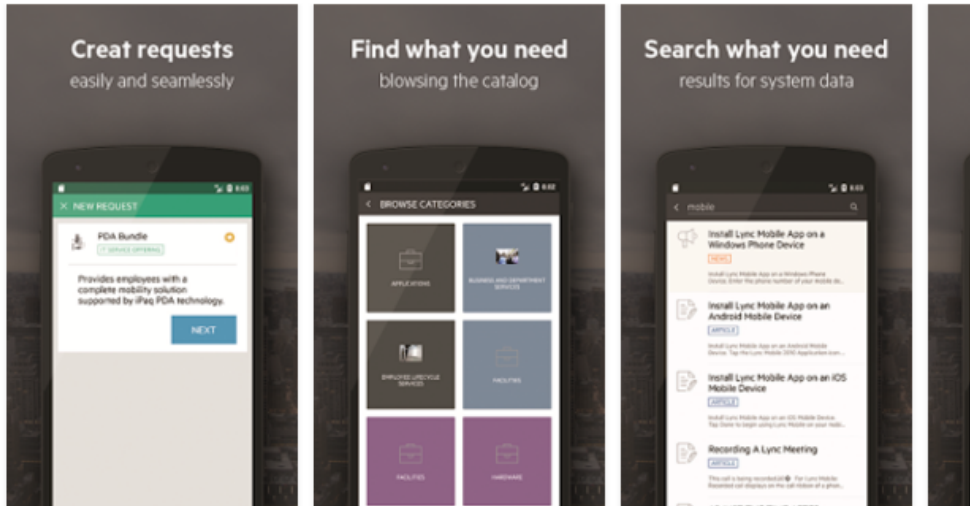
Hewlett Packard Enterprise Company Business

★★★★★ 2

Everyone

Add to Wishlist

Install



Setup

The setup step is required only if your company uses a private root CA certificate, and therefore the HTTPS connection is considered "untrusted" by Android and then blocked. Skip this step if your company uses a trusted certificate for ITSMA Service Portal. For information about how to replace the out-of-box Nginx certificate in ITSMA with a certificate signed by a public CA, see [Replace the certificate for ITSMA](#).

As an end user, after you have the mobile app installed successfully on your Android mobile device, if your company uses a private root CA certificate, you should be able to receive from your IT department your company's private root CA certificate, which you need to import into your mobile device by following Google's instructions [here](#).

Activation

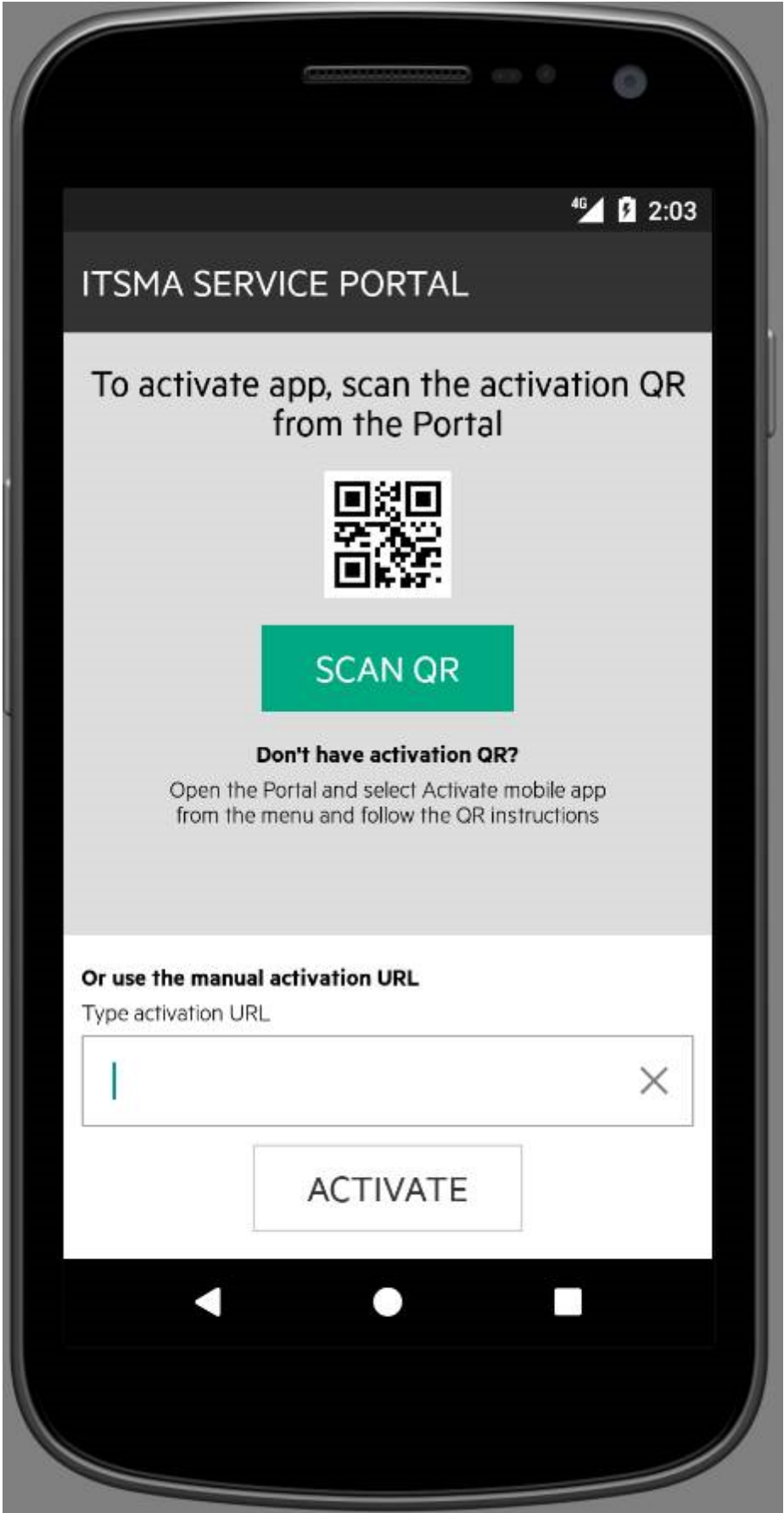
After you have successfully set up the mobile app, you need to specify the ITSMA Service Portal URL so that your mobile device can connect to Service Portal.

There are two ways to activate the app.

Option 1: Activate the mobile app by scanning a QR code from the Service Portal user interface:

1. From a computer, log in to ITSMA Service Portal (https://<EXTERNAL_ACCESS_HOST>/saw/ess), and then click **Activate mobile app** on the right side of the screen. A QR code is generated and displayed on the screen.
2. Open the mobile app from your mobile device, tap the **SCAN QR** button and then scan the QR code displayed on your computer screen. The system then automatically enters the activation URL and activates the app for you.

Option 2: Open the mobile app from your mobile device, enter the activation URL (https://<EXTERNAL_ACCESS_HOST>/saw/ess), and then tap **ACTIVATE**.



After the activation, you are directed to the ITSMA login page.

Login

When the ITSMA login page is displayed, log in with your ITSMA credentials.



Hewlett Packard Enterprise

ITSMA

Log In



Persistent session

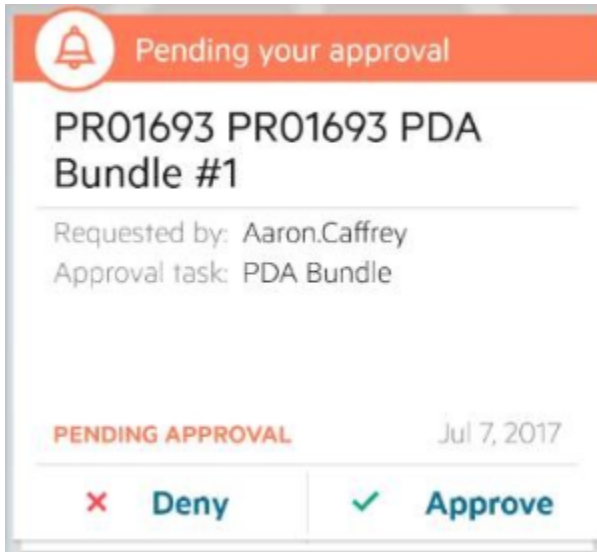
The mobile portal provides users with persistent sessions so that they do not have to log in frequently. The mobile app keeps each user session alive for two weeks, and refreshes the session token at the backend on a daily basis.

To-do card

A to-do card is displayed after login. You can drill down and view the request details. The card type can be **Active request**, **Pending your approval**, or **Resolved request**.

If you are an approver

You can view, approve, or deny all the requests pending your approval.



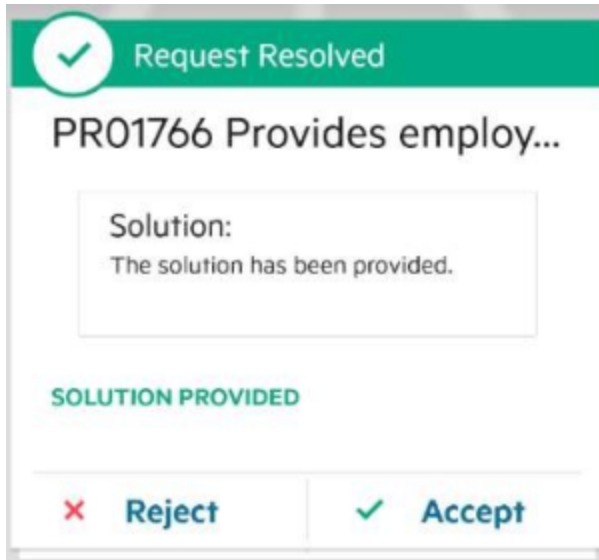
If you are a normal end user

You can do the following:

- View all the active requests you submitted
These requests include service offerings and support offerings. The requests submitted in the web client are also synchronized to the mobile app. You can also add comments or close the ticket if the action is allowed.



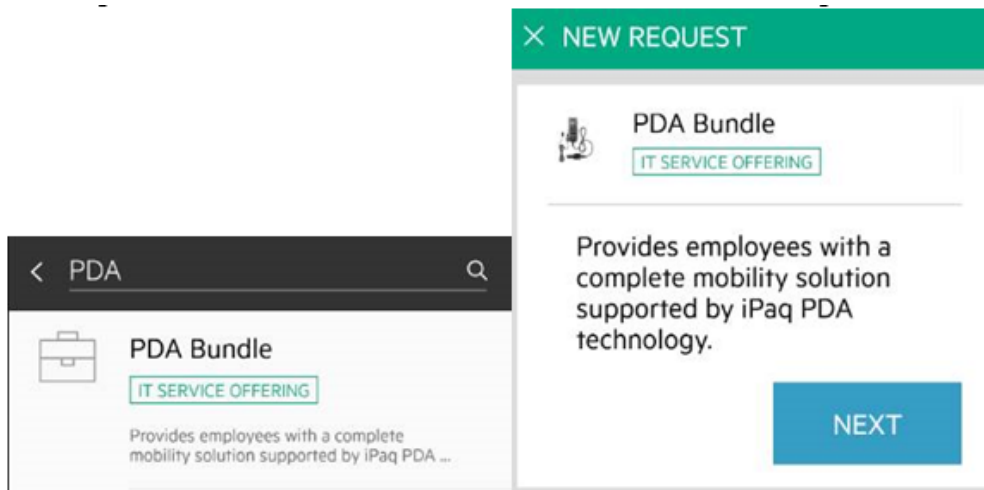
- View all your resolved requests, and accept or reject the solutions provided by an IT agent



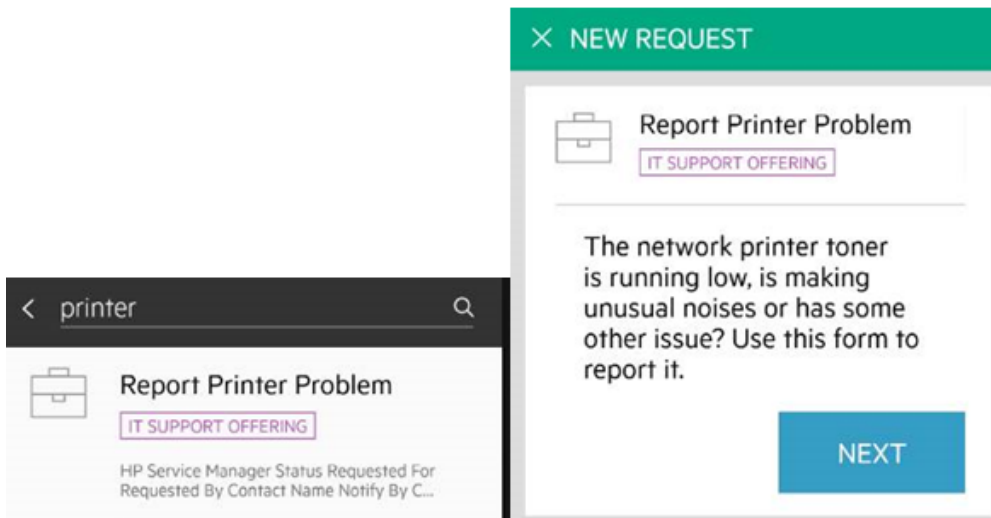
Search

You can search by typing one or more keywords. The returned results may include:

- Catalog items. You can drill down the results and submit the service offering.

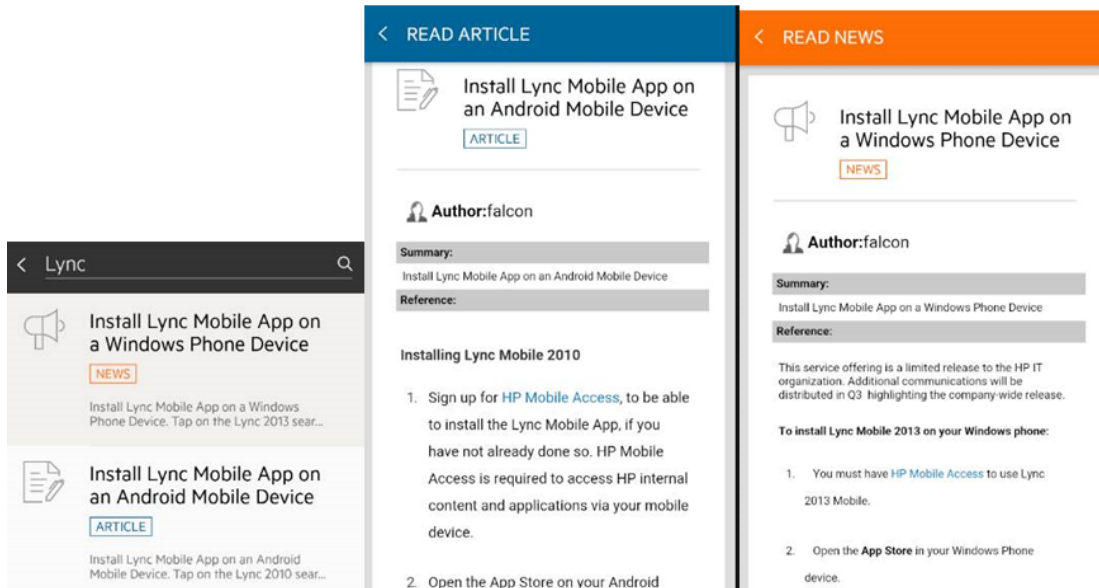


- Support offering. You can drill down the results and submit the support ticket.



- Articles and news. You can view the KM articles and detailed news.

Limitation: The attachment for an article is hidden on your mobile.



Recent offerings and popular items

You can view the recent offerings submitted by yourself. This page also lists the popular items suggested by IDOL.

Search



Recent offerings



Apple iPhone 6 Plus

IT SERVICE OFFERING

Apple iPhone 6 Plus

Popular



Generic SM Support Catalog Item

IT SUPPORT OFFERING

This support catalog item is used to create support requests if no sp...



Apple iPhone 6 Plus



IT SERVICE OFFERING



BROWSE CATEGORIES



Browsing categories

To find the service offerings and support offerings, you can either search or browse them from the related categories.



4G 4:33

< BROWSE CATEGORIES



BUSINESS AND
DEPARTMENT SERVICES



PERSONAL
PRODUCTIVITY SERVIC...



TECHNICAL AND
SUPPORT SERVICES



CUSTOMER

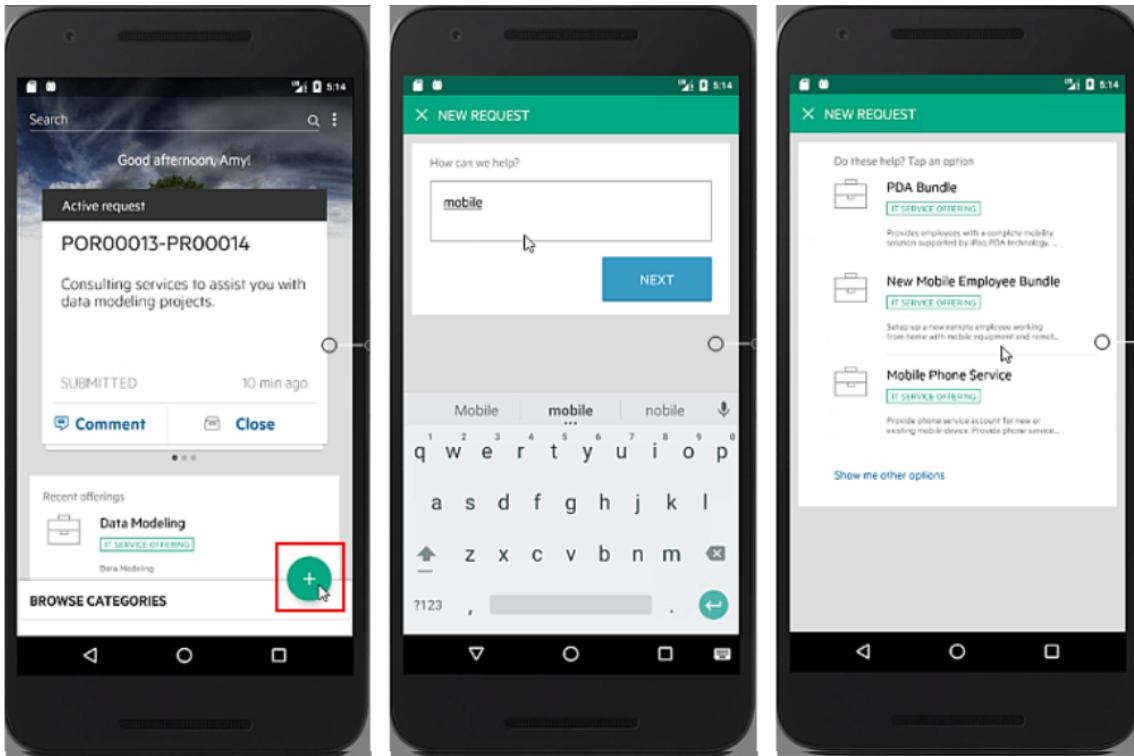


SHENJUE CATEGORY



Entry of a new request

- A search box for offerings is available when an end user clicks the "+" button in the main screen.
- An end user can describe the problem details in the box.
- IDOL will automatically recommend the offerings based on the problem description.
- If no matching offerings are found, end users can browse the catalog or submit a generic support request.



Notification

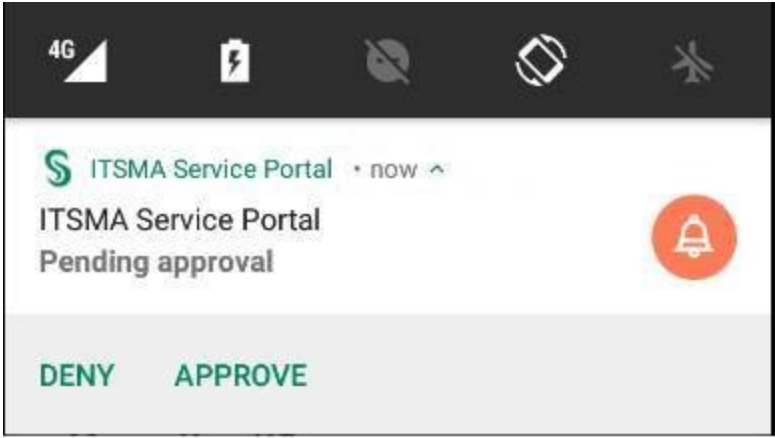
You can receive notifications on your device when you log in to Service Portal with the mobile app. If your organization uses a proxy server to access Internet, refer to [Configure the Service Portal mobile app](#) for instructions on how to enable notifications.

- Make sure that you can receive notifications from Google, also make sure that your mobile is in a network that can connect to Google Play directly. Google notifications cannot be sent to a device if it connects to the network via a proxy.
- The mobile app does not allow an end user to submit multiple catalog items in one order. Although this kind of orders submitted using the web client will be synchronized to the mobile app and a ticket will be opened, the notification cannot be received on your mobile device.

If you are an approver

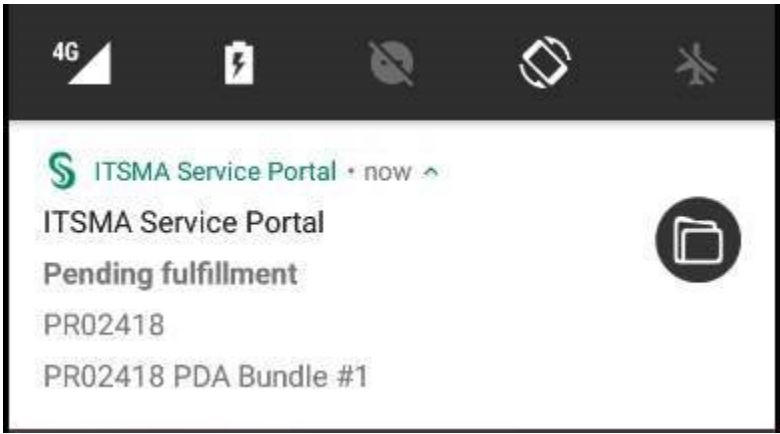
You can receive a notification when a new request is pending your approval. By expanding the notification, you can choose to approve or deny the request directly. Or, you can drill down the notification and open the request detail page.

If the current request is denied/approved by someone else, the deny/approve operation from the mobile app will be invalid. When this happens, if you open the detail page, you will not see the related action button.

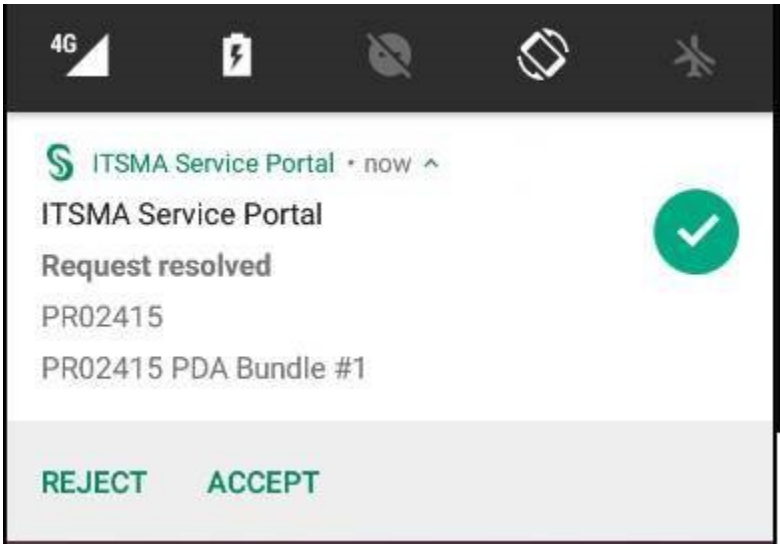


If you are a normal end user

You can receive a notification when your request status is changed to "pending fulfillment". You can drill down the notification and open the request detail page.



Being an end user, you can also receive a notification when your request has been resolved. By expanding the notification, you can choose to accept or reject the request directly. Or, you can drill down the notification and open the request detail page.



Submit the ticket

You can submit service offerings and support offerings from the mobile app. Once a request is submitted successfully, you can view the request details or return to the home page directly.

4G  4:40



**YOUR REQUEST HAS
BEEN SUBMITTED**

[VIEW REQUEST](#)

[DONE](#)