CA Service Desk Manager Mobile Enabler

Implementation Guide

Release 1.5.00

technologies

Contact CA Technologies

Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information that you need for your Home Office, Small Business, and Enterprise CA Technologies products. At http://ca.com/support, you can access the following resources:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

Providing Feedback About Product Documentation

If you have comments or questions about CA Technologies product documentation, you can send a message to techpubs@ca.com.

To provide feedback about CA Technologies product documentation, complete our short customer survey which is available on the CA Support website at http://ca.com/docs.

Contents

Chapter 1: CA SDM Mobile Enabler

CA SDM Mobile Enabler is a common interface to access some of the core features of CA SDM and Open Space from your mobile device. The following mobile capabilities are available in CA SDM Mobile Enabler:

- Queue Monitor - view and perform activities on tickets created in CA SDM.
- Tickets - create and view the tickets raised by the logged-in user.
- Approvals - approve or reject assigned work items created by a workflow engine.
- Open Space- post or answer questions on communities; if the community cannot answer your questions, raise a ticket.

Queue Monitor

The Queue Monitor mobile application enables the logged-in user to access the following CA SDM core features:

- View the status of the assigned and unassigned tickets (incidents, requests, problems, issues, and change orders only).
- Drill down a ticket type and view the details of the ticket.
- Filter each ticket type to view only selected information. For example, the logged-in user can filter the Incident list to view only assigned incidents with high priority.
- View updated ticket counts. The count is automatically updated after every 4 minutes, which is a default selection. The logged-in user can configure the refresh interval from the Settings screen.
- Perform actions on tickets, for example, transfer the ticket to another analyst, change the priority of the ticket, update the status, and log comments.

Approvals

The Approvals capability is used to quickly and seamlessly approve or reject assigned workflow tasks that are pending in the analyst queue. The Approvals capability provides the mobile user with all the information required to complete the task.

A guided tour of the capability appears when the user accesses the Approvals capability.

The logged-in user can access the following core features of this capability:

- View the following tasks:
  - Workflow tasks that are assigned to the user.
  - Workflow tasks that are assigned to a group that the user belongs to.
  - Pending tasks from Classic Workflow and ITPAM workflow engine (if integrated with CA SDM).
  - Workflow tasks for which the user is requested to respond, regardless of the CA SDM ticket assignee or requester. For example, a financial approval task is likely to be performed by the user who is not directly involved with CA SDM.

    Note: No error report is displayed when information from a workflow engine is unavailable (workflow engine is down or the user is not authorized to that workflow engine). For example, if the ITPAM server is down, the mobile application does not display the ITPAM work items and no error message is displayed to the user. If at any time, ITPAM server starts working, the ITPAM work items will be visible to the user.
- View a bar chart showing the number of pending tasks that are awaiting input, as per the time the task has been pending. This bar chart allows the user to identify new tasks as well as tasks that have been waiting for a long time.
- Tap on the bar on the graph or use the tabs on the bottom of the screen to go to the list of pending items filtered by pending time. For example, tapping on Last Hour bar or tab will display all the tasks created or modified in the last one hour and is pending for approval.
- Tap on a task in the list to view the work item details.
  - View the detail form of the work item from the Task tab.
  - View the related ticket information to understand more about the request from the Ticket tab.
  - Submit the pending tasks from the Task tab with the required information.
  - Custom approval forms are automatically available on the mobile device without any modification. They may be reformatted for rendering on the mobile device.

  - Call or email the requester by tapping on the email address or phone number listed on the related ticket tab.
  - (For change order ticket types only) Download and view attachments for the related change order ticket types. You may need additional software to view the downloaded document.

    Important! To view attachments, turn off the "block popups" option in the web browser.

    Note: If you download the attachment on the Android pop-up browser an error message is displayed. Tap the arrow from the left side of the pop-up browser. The pop-up browser converts into the main browser and you can download the attachment.

- Search for a pending task. To filter the list of pending tasks, tap search, then begin typing in the search area. The search result is updated as you type. You can search using ticket numbers, priorities, or keywords from task descriptions.
- Refresh the screen and view the current list of pending tasks. New work items are only displayed when you refresh the list. Tap system menu from the top right corner of the screen and find the Refresh option.
- Enable verbose debugging information by selecting system menu, More Info. Tap Tracing drop-down to select On. Check the approve.log file from $NX_ROOT\log directory. It is recommended to disable the option to avoid additional server overhead.

Tickets

The Tickets application enables the logged-in user to access the following core features of CA SDM:

- Create an incident or request (as configured by the administrator).
  - Enter only summary and description for faster submission of a ticket.
- Mark the ticket as urgent.
  - If you mark it as urgent, Priority of the ticket is set as 2 or else it will be set as 3.
  - (Incidents only) If Automatic Priority Calculation (APC) is enabled on CA SDM and you mark the ticket as Urgent, Impact becomes 2-Multiple Groups and Urgency becomes 4-Very Quickly. The default APC matrix sets priority as 2 for these urgency and impact values.
  - (Incidents only) If APC is enabled on CA SDM and you have not marked the ticket as Urgent, Impact becomes 3 - Single Group and Urgency becomes 3 – Quickly. The default APC matrix sets priority as 3 for these urgency and impact values.

    Note: Any change made to the APC matrix has an impact on the priority value set while creating the ticket.

- (Available only on the native Android application) Add an attachment (JPEG and PNG formats only) to the ticket. Allowed size for the attachment is 2 MB or less.
    - Use the camera to take a snapshot.
    - Use the gallery to select an image.

    Important! To view attachments, turn off the "block popups" option in the web browser.
- (Available only on the native Android application) Add the geographical location from where the ticket is created by tapping on the location icon. The location is displayed as a comment when the ticket is saved. You can also disable the location services.
- View the details of the active tickets raised by the logged-in user.

Open Space

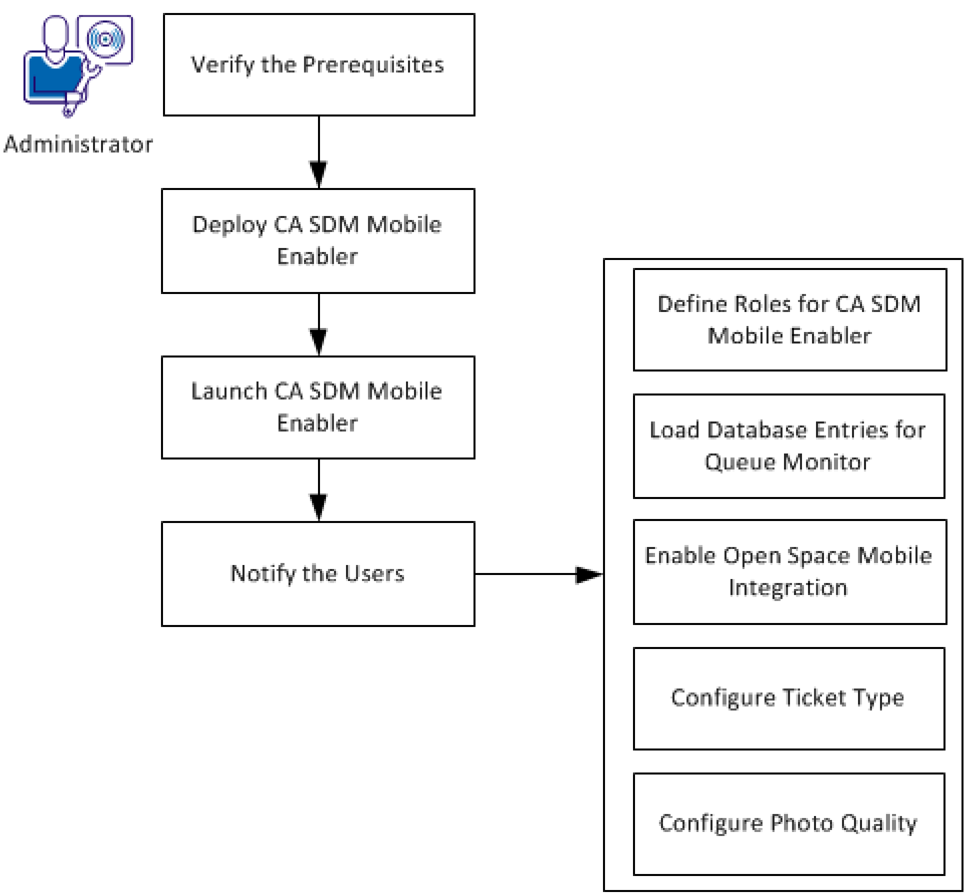
The logged-in user can access the following core features of CA Open Space on a mobile device:

- Post questions, get answers, share information, solutions, and ideas.
- Open a Service Desk request or incident (as configured by the administrator) , if the community does not provide the answer. You can create request or incident directly from the posted questions (if already created).
- Search community posts using keywords.
- View the posts according to popular tags. For example, you can view latest posts or only those posts that you have been following. Tap Filter to find the options.

Chapter 2: How to Deploy and Configure CA SDM Mobile Enabler

You deploy CA SDM Mobile Enabler on the CA SDM server to use the capabilities. The following diagram shows how to deploy and configure CA SDM Mobile Enabler:

How to Deploy and Configure CA SDM Mobile Enabler



Administrator
Verify the Prerequisites
Deploy CA SDM Mobile Enabler
Launch CA SDM Mobile Enabler
Notify the Users
Define Roles for CA SDM Mobile Enabler
Load Database Entries for Queue Monitor
Enable Open Space Mobile Integration
Configure Ticket Type
Configure Photo Quality

Follow these steps:

1. Verify the Prerequisites (see page 10).
2. Deploy CA SDM Mobile Enabler. (see page 11)
3. Launch CA SDM Mobile Enabler (see page 11).
4. Notify the Users (see page 14).

5. Make Configuration Changes
   - Define Roles for CA SDM Mobile Enabler (see page 15).
   - Load Database Entries for Queue Monitor (see page 17).
   - Enable Open Space Mobile Integration (see page 18).
   - Configure Ticket Type (see page 19).
   - Configure Photo Quality (see page 19).

Verify the Prerequisites

Before you begin the installation of CA SDM Mobile Enabler, verify the following prerequisites:

- Associated Product Versions and Patch Numbers (see page 10)
- Certified Mobile Operating Systems (see page 10)
- Deployment Considerations (see page 11)

Associated Product Versions and Patches

Verify that you have the following associated product versions and patches:

- ITPAM r3.1 SP1, 4.0 SP1, 4.1 (if CA SDM is integrated with ITPAM)
- CA SDM r12.7
- CA Open Space r2.0 (if CA SDM is integrated with CA Open Space)
- Latest REST Patches

Certified Mobile Operating Systems

CA SDM Mobile Enabler is certified on the native browser for the following mobile operating systems:

- iOS 6 and iOS 5
- Android 4.1 and Android 4.0

  Note: Android is a trademark of Google Inc.

Deployment Considerations

Verify the following requirements before you deploy or use CA SDM Mobile Enabler:

- To access Queue Monitor, Tickets, and Approvals, CA SDM r12.7 must be installed and configured on the server where you want to install CA SDM Mobile Capabilities. REST is also installed and configured on the same server. For more information, see the *CA Service Desk Manager Implementation Guide*.
- To access Open Space, CA Open Space r2.0 must be installed and configured to the CA SDM server. For more information, see the *CA Open Space Implementation Guide*.
- Associated the logged in users for Queue Monitor and Tickets with the REST Web Service API role. Ensure that the *Administration*, *Security*, and *Reference* function accesses of this role are assigned with the View or Modify access levels. For more information about function access, access level and roles, see the *CA Service Desk Manager Administration Guide*.
- Applied the latest REST patches from CA Support.

Deploy CA SDM Mobile Enabler

You deploy CA SDM Mobile Enabler on the CA SDM server.

Follow these steps:

1. Download the ISO file for CA SDM Mobile Enabler from CA Support and extract it on the CA SDM server. Contact support for download details.
2. Open the Server folder from the extracted ISO file.
3. If you already have Queue Monitor r1.0 installed, delete the "mobile" folder from the following directory:

   ```
   NXROOT\bopcfg\www\CATALINA_BASE_REST\webapps
   ```

   All instances of the existing Queue Monitor mobile capability are removed.
4. Use the ApplyPTF tool to deploy the following files on the CA SDM server:

   - (Windows) T5UG191.caz
   - (Linux) T5UG192.tar.Z
   - (Solaris) T5UG193.tar.Z
   - (AIX) T5UG194.tar.Z

   Read the respective TXT files from the Server folder for the deployment steps.

   Note: ApplyPTF can be obtained from CA Support. Contact support for download details.

5. After the successful deployment, verify that the following WAR files are present in the $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps directory:
   - qmonitor.war
   - tickets.war
   - approve.war
   - workflow.war
   - camobile.war
6. After the successful deployment, the following guides will be created in the $NX_ROOT/Doc/Mobile_Enabler_1_5 directory:
   - CA Service Desk Manager Mobile Enabler Implementation Guide
   - CA Service Desk Manager Release Notes
7. Start the CA SDM services if not started.

   After successful deployment, the following folders will be created in the $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps directory:

   Note: This process may take few minutes.
   - qmonitor
   - tickets
   - approve
   - workflow
   - camobile
8. Copy the sdm.apk file from the Android_App folder of the extracted ISO file to the following location:

   ```
   $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps\camobile
   ```

   CA SDM Mobile Enabler is deployed.

Launch CA SDM Mobile Enabler

Launch the CA SDM Mobile Enabler to access the mobile capabilities.

To launch CA SDM Mobile Enabler from the web browser follow these steps,

- Open the following URL from your mobile browser:

  `http://`*`servername:portnumber/`*`camobile?role=`*`rolename`*

  servername

  Specifies the name of the server where CA SDM Mobile Enabler is installed.

portnumber

Specifies the REST port number. If you are using the mobile application outside the firewall, ensure that you have opened the REST Tomcat Port that you specified during the REST Web Services configuration.

rolename

(Optional) Specifies the role that the user wants to use to log in. For more information, see the Define Roles for CA SDM Mobile Enabler (see page 15) topic.

The role-specific icons for the capabilities are displayed on the CA SDM screen.

(For the Android users only) To launch CA SDM Mobile Enabler as a native application,

Important! If you are using android 4.0, ensure that the Unknown Sources option is selected on your mobile device.

1. Open the following URL from the web browser and tap Go:

   ```
   http://servername:portnumber/camobile/sdm.apk
   ```

   The sdm.apk file is downloaded.

2. Tap on the downloaded sdm.apk file.

   A screen opens, prompting you to install CA SDM Mobile Enabler.

3. Tap Install.

   CA SDM icon appears on your mobile device.

4. Tap on the CA SDM icon.

   The CA SDM Domain Configuration screen opens.

5. Enter the following domain configuration information:

   Domain Name

   Specifies the fully qualified hostname for the CA SDM domain. For example, sdmprod.mycompany.com.

   Important! For users to view and download attachments from Tickets, ensure that you update the attachment servlet path as this Domain name from CA Service Desk Manager Administration web interface.

Role

Specifies the role of the logged-in user. CA SDM Mobile Enabler provides some predefined roles. An administrator can add more roles. For more information, see the Define Roles for CA SDM Mobile Enabler (see page 15) topic.

Port

Specifies the REST port number. If you are using the mobile application outside the firewall, ensure that you have opened the REST Tomcat Port that you specified during the REST Web Services configuration.

Use https

Indicates whether CA SDM is configured to use the SSL secure web service protocol.

Always use this domain

Select this option if you do not want the Domain Configuration screen to appear again. To use another domain, clear the application data for CA SDM Mobile Enabler from the Settings option of your mobile device and then launch CA SDM Mobile Enabler.

6. Tap Ok.

   The role-specific icons for the capabilities are displayed on the CA SDM screen.

   Note: You must log in to each capability to access it. If you log out from a capability, you will be directed to the capability login page again. To go back to the CA SDM screen with all the icons, close the browser and launch CA SDM Mobile Enabler again or tap back arrow on your web browser.

Notify the Users

After successful deployment of CA SDM Mobile Enabler, you send the following information to all the mobile users:

- The following URL to access CA SDM Mobile Enabler from the web browser:

  `http://servername:portnumber/camobile?role=rolename`

  servername

  Specifies the name of the server where CA SDM Mobile Enabler is installed.

portnumber

Specifies the REST port number. If you are using the mobile application outside the firewall, ensure that you have opened the REST Tomcat Port that you specified during the REST Web Services configuration.

rolename

(Optional) Specifies the role that the user wants to use to log in. For more information, see the Define Roles for CA SDM Mobile Enabler (see page 15) topic.

- (For Android users only) The following URL to access CA SDM Mobile Enabler as a native application from the Android web browser:

  `http://servername:portnumber/camobile/sdm.apk`

- (For Android users only) The following domain configuration information that is required when the user accesses CA SDM Mobile Enabler:

Domain Name

Specifies the fully qualified hostname for the CA SDM domain. For example, sdmprod.mycompany.com.

Important! For users to view and download attachments from Tickets, you have to update the attachment servlet path as this Domain name from CA Service Desk Manager Administration web interface.

Role

Specifies the logged in user role. CA SDM Mobile Enabler provides some predefined roles. An administrator can add more roles. For more information, see the Define Roles for CA SDM Mobile Enabler (see page 15) topic.

Port

Specifies the REST port number. If you are using the mobile application outside the firewall, ensure that you have opened the REST Tomcat Port that you specified during the REST Web Services configuration.

Use https

Indicates whether CA SDM is configured to use the SSL secure web service protocol.

Define Roles for CA SDM Mobile Enabler

A role defines the capabilities that the users of that role can view. The user chooses the role while opening CA SDM Mobile Enabler. The capabilities that are displayed to the user are dependent on which role the user has selected. By default, CA SDM Mobile Enabler provides the following roles:

- Administrator: Can access Approvals, Queue Monitor, Open Space, and Tickets capabilities.
- Approver: Can access Approvals and Open Space capabilities.
- Business User: Can access Tickets and Open Space capabilities.
- IT User: Can access Queue Monitor and Open Space capabilities.
- (default): If no role is selected, all the capabilities are displayed.

When you configure CA SDM Mobile Enabler, you can define new capabilities to new or existing roles. Each role has a role definition file that is located in the following directory:

```
$NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps\camobile\app\misc
```

The applications_rolename.json defines the role and the capabilities that the role can access. You can easily add your own capability to the list of capabilities by adding the new application definition to the role definition file.

Example: You want to give the business user access to your capability, "XYZ".

Follow these steps:

1. Log in to the server where you have installed CA SDM Mobile Enabler.
2. Go to the following directory:

   ```
   $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps\camobile\app\misc
   ```

3. Open the applications_Business User.json file.
4. Add the following content in the file to give the user access to the XYZ capability:

   ```
   [
       {
           "app_name": "XYZ",
           "app_url" : "http://<XYZhostname>:CA Portal/login.jsp?ca_mobile=1",
           "app_icon": "resources/images/XYZ_50.png"
       }
   ]
   ```

app_name

Specifies the label for the capability.

app_url

Specifies the URL to be launched when the user taps the icon.

app_icon

Specifies the icon to be shown on the mobile device.

app_append

Specify "app_append": "1" for Queue Monitor, Open Space, and Ticket only.

5. Save the file.

   Access to the application is assigned.

   Note: If you want to create a user role, make a copy of any applications_userrole.json file on the same location. Rename the file to applications_newuserrole.json and then modify the file content.

Ensure that you remove (or comment out) those capabilities which are not used or installed. For example, if the Open Space server is not installed, comment out the following Open Space information from all the applications_*userrole*.json files.

```
/*{

       "app_name": "Open Space",

       "app_url" : "http://<openspacehost>:CA
Portal/mobileapp/jsp/login.jsp?ca_mobile=1",

       "app_icon": "resources/images/OpenSpace_50.png"

    }*/
```

Load Database Entries for Queue Monitor

For the users to access the Queue Monitor capability, you run the pdm_load command to load the data in the database.

Follow these steps:

1. Log in to the CA SDM server where CA SDM Mobile Enabler is deployed.

2. On the command prompt, go to the following directory:

   ```
   $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps\qmonitor
   ```

3. Run the following command from the command prompt:

   ```
   pdm_load –f mobileappsdata.dat
   ```

   The data is loaded in the database.

Enable Open Space Mobile Integration

Open Space is installed as a separate capability and requires to be integrated with CA SDM Mobile Enabler.

Follow these steps:

1. Log in to the CA Open Space server.
2. Stop the CA Open Space server.
3. Remove the "mobileapp" folder from the following directories:
   - OPENSPACE_HOME/OSOP/tomcat-7.0.23/webapps
   - OPENSPACE_HOME/OSOP/tomcat-7.0.23/work
4. Copy the mobileapp.war file from the Server, Open_Space_Mobile_Capability folder of the extracted ISO file to the following location on the CA Open Space server:

   ```
   OPENSPACE_HOME/OSOP/deploy
   ```

5. Start the CA Open Space server.
6. Log in to the CA SDM server where CA SDM Mobile Enabler is deployed.
7. Go to the following directory:

   ```
   $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps\camobile\app\misc
   ```

8. Open the applications.json file.
9. Edit the app_url to include the following URL:

   `http://`*`<tenant_name:portnumber>`*`/mobileapp/jsp/login.jsp?ca_mobile=1`

   Note: Use "https" if CA Open space is configured to use the SSL secure web service protocol.

10. Save the file.
11. Perform steps 9 and 10 for the following files:
    - applications_administrator.json
    - applications_business user.json
    - applications_it user.json
    - applications_approver.json
    - any new applications_*newuserrole*.json file that you have created with Open Space access.

    Open Space mobile capability is integrated with CA SDM Mobile Enabler.

Configure Ticket Type

The logged-in user for Tickets can raise a request or an incident. As an administrator, you specify the ticket type to be an incident or request.

Follow these steps:

1. Log in to the CA SDM server where you have installed CA SDM Mobile Enabler.
2. Go to the following directory:

   ```
   $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps\tickets
   ```
3. Open the SSUSettings.json file.
4. Complete one of the following actions:
   - Specify the type as "in" to select only incidents as the ticket type.
   - Specify the type as "cr" to select only requests as the ticket type.
5. Save the file.

   The ticket type is configured.

Configure Photo Quality

As an administrator, you can configure the quality of the photo that the user wants to attach from the Tickets capability. When the user attaches the photo with the ticket, the quality of the photo is reduced to the set resolution.

Follow these steps:

1. Log in to the CA SDM server where you have installed CA SDM Mobile Enabler.
2. Go to the following directory:

   ```
   $NX_ROOT\bopcfg\www\CATALINA_BASE_REST\webapps\tickets
   ```

3. Open SSUSettings.json file.
4. Change the value of the Quality parameter. If the value entered is more than 99 or less than 20, then the quality is defaulted to 50.
5. Save the file.

   The photo resolution is configured.