



**SERENA®**

# **SERVICE MANAGER**

## **Installation and Configuration Guide**

Serena Proprietary and Confidential Information

---

Copyright © 2011 Serena Software, Inc. All rights reserved.

This document, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. Except as permitted by such license, no part of this publication may be reproduced, photocopied, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Serena. Any reproduction of such software product user documentation, regardless of whether the documentation is reproduced in whole or in part, must be accompanied by this copyright statement in its entirety, without modification. This document contains proprietary and confidential information, and no reproduction or dissemination of any information contained herein is allowed without the express permission of Serena Software.

The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Serena. Serena assumes no responsibility or liability for any errors or inaccuracies that may appear in this document.

## **Trademarks**

Serena, TeamTrack, StarTool, PVCS, Collage, Comparex, Dimensions, Serena Dimensions, Mashup Composer, Mashup Exchange, Prototype Composer, Mariner, and ChangeMan are registered trademarks of Serena Software, Inc. The Serena logo, Version Manager, Meritage, and Mover are trademarks of Serena Software, Inc. All other products or company names are used for identification purposes only, and may be trademarks of their respective owners.

## **U.S. Government Rights**

Any Software product acquired by Licensee under this Agreement for or on behalf of the U.S. Government, its agencies and instrumentalities is "commercial software" as defined by the FAR. Use, duplication, and disclosure by the U.S. Government is subject to the restrictions set forth in the license under which the Software was acquired. The manufacturer is Serena Software, Inc., 1900 Seaport Boulevard, 2nd Floor, Redwood City, CA 94063-5587.

Part number: Serena Service Manager Product version: 2.0

Publication date: 2011-07-25

---

# Table of Contents

Chapter 1: Purpose of This Guide .....	5
Chapter 2: Installing On-Premise .....	7
Running the Serena Service Manager Installer .....	7
About Relationship Explorer Installation .....	9
Importing the Solutions .....	9
Promoting the Snapshots .....	11
Setting Authentication for Orchestrations.....	15
Chapter 3: Setup and Configuration .....	17
Adding Auxiliary Data .....	17
Managing Users .....	18
Incident Management Roles .....	19
Request Fulfilment Roles .....	20
Change Management Roles .....	21
Problem Management Roles .....	22
CMS Roles .....	22
Knowledge Management Roles .....	23
Enabling Notifications .....	24
Configuring Request Center .....	25
About the Image Picker .....	30
Modifying Process Apps .....	31
General Modifications.....	32
Chapter 4: What's New in Serena Service Manager 2.0.0? .....	33
Chapter 5: Upgrading .....	37
Chapter 6: Additional Information.....	39
Integrations Between Applications .....	39
Additional ITIL References .....	39



---

# Chapter 1: Purpose of This Guide

This guide explains how to install and configure Serena Service Manager 2.0.0 and Serena Knowledge Management 2.0.0.

This guide is meant for Service Manager administrators who are responsible for initially installing and deploying the Service Manager solution.

This guide does not give details on the specifics about the service management workflows and their features. For details on Service Manager and its workflows, refer to the *Serena Service Manager User's Guide*.

This guide also does not contain detailed information on modifying projects, users, workflows, or orchestrations. For details on configuring and modifying the solution after you have promoted it, refer to the following guides that are included with your Serena Business Manager installation:

- *SBM System Administrator Guide* for configuring projects, users, and groups in on-premise installations.
- *SBM Composer Guide* for modifying workflows and process apps.
- *SBM Application Administrator Guide* for deploying and promoting snapshots and process apps.
- *Serena<sup>®</sup> Business Manager Installation and Configuration Guide* for installing the SBM platform and for configuring your installation using SBM Configurator.



---

## Chapter 2: Installing On-Premise

This chapter applies to on-premise installations of Serena Service Manager 2.0.0 and Serena Knowledge Management 2.0.0.



**Important:** Before installing Service Manager, you must install and configure Serena Business Manager R4.02 or later as described in *Serena<sup>®</sup> Business Manager Installation and Configuration Guide*.



**Note:** This version of Serena Service Manager installs the components using solution files, which are imported and promoted to your environment. This differs from previous versions of Serena Service Manager, which installed by importing a sample database that included all of the Serena Service Manager components.

### To install Service Manager in an on-premise SBM system:

1. Install and configure Serena Business Manager R4.02 or later, creating an administrative user which will be used to import and promote the Service Manager solution.
2. Run the Service Manager installer on the machine where your SBM Server resides. If your SBM Application Engine and SBM Application Administrator are installed on separate machines, you must run the installer on both servers.
3. Import the solution files as described in [Importing the Solutions \[page 9\]](#).
4. Promote the solution process apps as described in [Promoting the Snapshots \[page 11\]](#).



**Important:** Choose to promote the snapshots instead of deploying them. Promoting maintains data that is necessary for some operations, such as priming Request Center with sample data.

5. For non-SSO installations, configure the orchestrations to be authenticated under a specific user account as described in [Setting Authentication for Orchestrations \[page 15\]](#).
6. Add auxiliary data, set default field values, and assign users to appropriate roles as described in [Chapter 3: Setup and Configuration \[page 17\]](#).

## Running the Serena Service Manager Installer

The Serena Service Manager installer lays down the necessary framework and components for the solution.

The components included in the installer are:

- Serena Service Manager solution file, which includes the process apps, groups, and reports that will be promoted to your SBM Server.
- The custom e-mail templates that are used by Serena Service Manager.

- Knowledge Management solution file, which includes the process apps, groups, and reports associated with Knowledge Management.
- HTML Editor , which includes the files necessary to embed the Aloha Editor within the Knowledge Management forms.
- Request Center, which includes the templates and files needed for the special portal page into Service Manager.
- Knowledge Center, which includes the necessary framework files for Knowledge Center.
- Relationship Explorer, which includes the files needed for the graphical visualizer, which is used to visually depict relationships between items. For more information, see [About Relationship Explorer Installation \[page 9\]](#).



**Note:** The Serena Service Manager solution files can be found in the **solution** directory located here: `SBM Installation Directory\Serena`. The file names are composed of the version number of the current solution and the `.sln` extension. After you upgrade to a newer version of a solution, the previous `.sln` files are no longer used, but they are not deleted. You can delete these previous solution files to save space.

## Running the Installer

### To install the Serena Service Manager files:

1. Run the installer on the machine where your SBM Server resides. If your SBM Application Engine and SBM Application Administrator are installed on separate servers, you must run the installer on both machines.
2. Choose the Service Manager installation directory. This directory will temporarily store the Service Manager files before they are copied into the appropriate folders inside the SBM installation directory for use by the SBM Server.



**Note:** You can not choose to install Service Manager in the same directory as your existing SBM installation.

3. After the installer completes, restart your IIS Web Server.

The files and other components described above are now installed on your machine. Verify that the install completed successfully by performing the following tasks:

- After a user logs into the User Workspace for the first time, the **KP Published** and **KP UserRatings** auxiliary tables will appear in SBM System Administrator.
- Verify that the Serena Knowledge Management 2.0.0 and Serena Service Manager 2.0.0 solutions appear under the **Solutions** view in Application Administrator.



- 
- Log in to the User Workspace at `http://serverName/tmtrack/tmtrack.dll?`.



**Important:**

When the User Workspace (`http://serverName/tmtrack/tmtrack.dll?`) is accessed for the first time after installing Service Manager, the loading time will be longer than normal and may cause a timeout.

This is due to the data associated with Service Manager being loaded. The slow loading will be a onetime occurrence.

Continue to [Importing the Solutions \[page 9\]](#) to finish installing Serena Service Manager.

## About Relationship Explorer Installation

The Relationship Explorer is a graphical visualizer used by Service Manager to visually depict relationships between items.

The installation process adds files to the base SBM Application Engine installation. The added files do not alter any existing SBM Application Engine code. Files are added to the following directories:

- `installationDirectory\Serena\SBM\Application Engine\bin`
- `installationDirectory\Serena\SBM\Application Engine\template`

For more information about Relationship Explorer, refer to "About Relationships" in *Serena Service Manager User's Guide*.

## Importing the Solutions

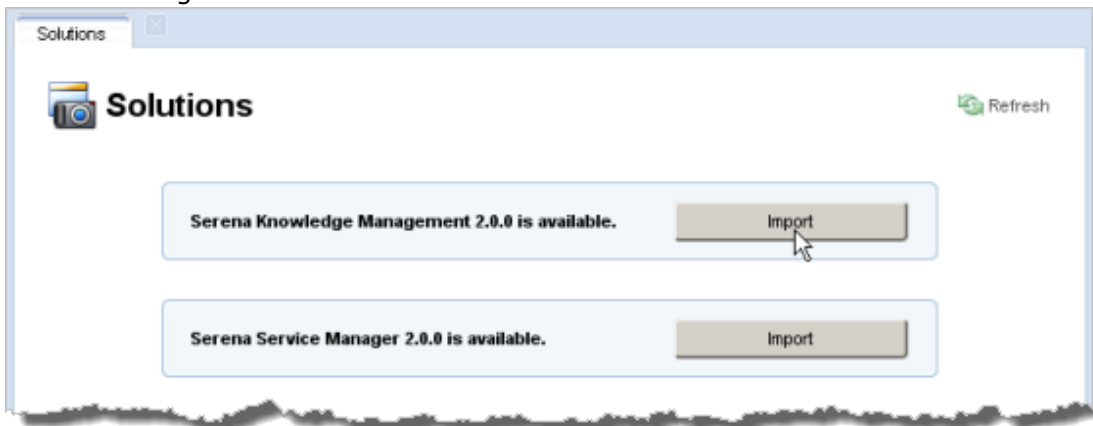
The Serena Service Manager solution files is imported into your environment after running the installer.

Importing the solution adds all of the snapshots and process apps for the solution to your SBM Server. The process apps and snapshots are available for promotion after the import.

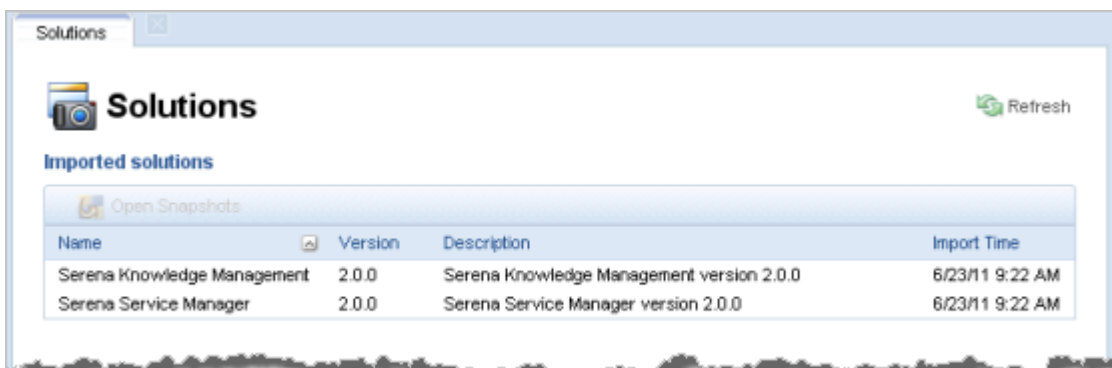
**To import the solution:**

1. Log in to SBM Application Administrator.
2. Select the **Solutions** tab.

- Click **Import** to import the Serena Knowledge Management 2.0.0 and Serena Service Manager 2.0.0 solutions.



Upon successful completion of the import, the imported solutions appear in the **Imported solutions** list.



On the **Process App Snapshots** tab, the snapshots contained in the Service Manager and Knowledge Management solutions will be available for promotion.

On **Process Apps** tab, the process apps are available for import into SBM Composer.



**Important:** Choose to promote the snapshots before deploying them. Promoting maintains data that is necessary for some operations such as maintaining internal IDs and priming Request Center with sample data. Deploying first may cause synchronization problems later.

## Troubleshooting Import

If the import of a solution file fails with an error, you can view the error in the **Application Administration Log** from within SBM Application Administrator.

The importing of solutions follows the following rules when there are existing applications. It attempts to upgrade an existing application with the new application if their internal IDs (UUIDs) are identical. If the internal IDs are different but the Application Names are identical, then the import will fail.



**Note:** Contact Serena support for information on finding an application's UUID.

If your import failed due to identical application names, the workaround is to delete the process app in the repository and then reimport the solution.

## Promoting the Snapshots



**Note:** Promotion is performed after you have completed importing the solutions as described in [Importing the Solutions \[page 9\]](#).

After importing the Serena Service Manager solution, you must promote the snapshots into your environment. Promoting the snapshots places the contents of the solution, including all reports, notifications, process apps, and auxiliary table data, onto your SBM Server.



**Important:** Choose to promote the snapshots before deploying them. Promoting maintains data that is necessary for some operations such as maintaining internal IDs and priming Request Center with sample data. Deploying first may cause compatibility problems later on.

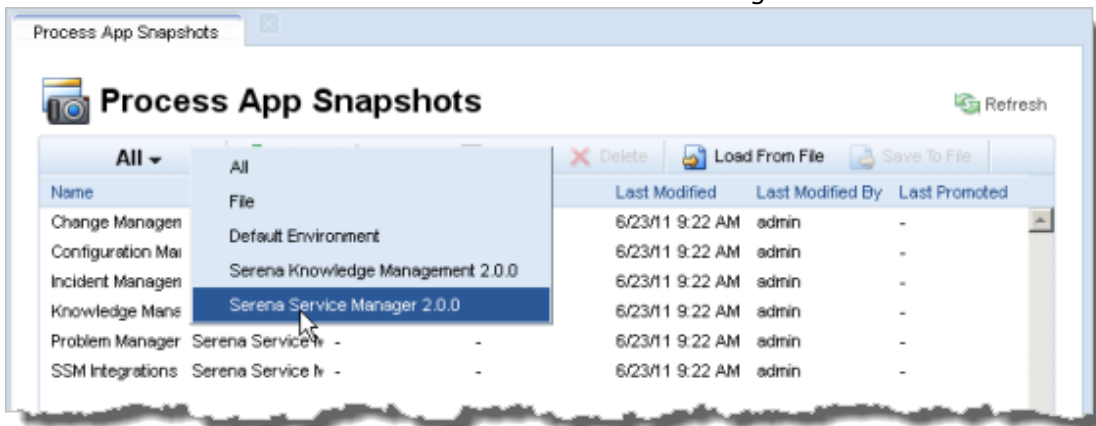
If you have an installed a previous version of Service Manager, the promotion will overlay the previous version. Note that the update only occurs when the process apps contain the same internal SBM ID. If you initially deployed a process app instead of promoting the snapshot, the process app may have been assigned a different ID. You will no longer be able to update the existing process app.

You must promote both the Service Manager and Knowledge Management snapshots as described in the following sections.

## Promoting Service Manager Snapshots

To promote the Service Manager snapshots:

1. Log in to SBM Application Administrator.
2. Select **Process App Snapshots** tab.
3. Click **All** and then select to filter on Serena Service Manager 2.0.0.



4. Promote the Serena Service Manager snapshots by performing the following steps:
  - a. Select the snapshot and click the **Promote** button. The **Summary** screen of the **Promote Dialog Box** is displayed.

- b. Choose the **Destination Environment** by selecting the **Destination** box.
- c. On the **Entities** screen, you choose which entities to import. It is recommended to import all of them, but it is not mandatory. The following tables explain which options must be selected for each snapshot and which options are optional.

**Table 1. Promotion Options**

Type	Notes
Projects	Mandatory.
Notifications	Optional, but suggested. Not importing notifications means that no notifications will be available until you create them.
Notification Rules	Optional, but suggested. Not importing notification rules means that notifications will not be sent within the workflow until you add new notification rules.
Reports	Mandatory.
Auxiliary Table Data	Depends on the process app. See the following table for more information.
Transition Group Restrictions	Mandatory.
User Field Selections	Mandatory.

**Table 2. Auxiliary Table Data**

Process App	Notes on Importing Auxiliary Table Data
SSM - Change Management	No auxiliary tables or data.

Process App	Notes on Importing Auxiliary Table Data
SSM - Configuration Management System	<ul style="list-style-type: none"> <li>• <b>CI Categories, CI Sub-Categories, CI Sub-Category Types:</b> Recommended, but not required. If you do not import the table data, you must populate the tables with data before using Service Manager.</li> <li>• <b>Model Numbers, Relationships, Software Platforms:</b> Not required. Note that these tables do not contain data and selecting them to import will have no effect.</li> <li>• <b>Relationship Types:</b> Strongly Recommended. If not, you must add relationship types before you can create relationships between CIs.</li> <li>• <b>Vendors:</b> Mandatory.</li> </ul>
SSM - Incident Management	<ul style="list-style-type: none"> <li>• <b>Resolution Codes, Symptom Codes:</b> Not required. Note that these tables do not contain data and selecting them to import will have no effect.</li> </ul>
SSM - Problem Management	<ul style="list-style-type: none"> <li>• <b>Workarounds:</b> Not required. Note that these tables do not contain data and selecting them to import will have no effect.</li> </ul>



**Note:**

Select the **Merge conflicts** option if you have already promoted the snapshot to the target environment and you want to preserve changes that were made to the existing application.

For example, you have already promoted a previous version of the Incident Management snapshot, which you then modified to added new notifications and user roles. You want to preserve these changes when you promote the new Incident Management snapshot.

The **Merge conflicts** option is only relevant when the items contained in the snapshot already exist in the target environment. Selecting the option will perform an automatic merge of the content in the snapshot with the existing content. The merge will change the existing data if it exists in the snapshot, and it will leave the other data alone.

For example, by selecting **Merge conflicts**, if you have added new user roles, these will remain in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

- d. Complete the Promotion dialog by clicking **Promote**.

- e. Repeat for each snapshot.



**Tip:** If you do not plan to use a particular process app, such as Incident Management, it is recommended that you still promote the Incident Management snapshot; however, you do not make it available to the end users. Each process app references other process apps, and this approach eliminates the reference errors that appear in SBM Composer when you attempt to modify the process apps.

The **Activities** tab of Application Administrator contains a log of the promotions. When viewing the logs, you may notice many warning messages, such as the following from the promotion log for SSM - Change Management:

```
WARN -- Unable to create field 'Linked CIs' in table
'Changes' because relational table 'Configuration Items' is not defined.
```

These warning messages are usually due to the related application having not yet been promoted to the target environment. In the previous example, SSM - Configuration Management System has not yet been deployed, which means that the relational field **Linked CIs** in SSM - Change Management cannot be defined successfully. This warning will be fixed once the referenced snapshot has been deployed.

## Promoting Knowledge Management

To promote the Knowledge Management snapshot:

1. Select to filter on Serena Knowledge Management 2.0.0.
2. Select the **SRC - Knowledge Management** snapshot and click the **Promote** button. The **Summary** screen of the Promote dialog box is displayed.
3. Choose the **Destination Environment** by selecting the **Destination** box.
4. On the **Entities** screen, you choose which entities to import. The following tables explain which options must be selected for the process apps and which are optional.

**Table 3. Promotion Options**

Type	Notes
Projects	Mandatory.
Notifications	Optional, but suggested. Not importing notifications means that no notifications will be available until you create them.
Notification Rules	Optional, but suggested. Not importing notification rules means that notifications will not be sent within the workflow until you add new notification rules.
Reports	Mandatory.
Auxiliary Table Data	Not required.

Type	Notes
Transition Group Restrictions	Mandatory.
User Field Selections	Mandatory.

5. Click **Promote** to import the snapshot.

## Setting Authentication for Orchestration

For on-premise SBM installations that are not running with Single Sign-On (SSO), you must configure the orchestrations in the listed process apps to run under a user account that is authorized to run orchestrations.

The following steps explain how to import the process app into SBM Composer, modify the orchestration, and deploy the process app to your SBM Server. This procedure must be performed for the following process apps:

- SSM - Configuration Management System
- SSM - Incident Management
- SSM - Problem Management



**Important:** Open all process apps in SBM Composer before attempting to edit. The apps reference each other, and if one is not imported into SBM Composer, you may get validation errors.

### To modify the orchestrations for non-SSO environments:

1. Open the process app in SBM Composer by clicking **Composer Button | Open | Application Repository** and selecting the process app.
2. Configure the orchestrations in the process to be authenticated under a user account that is authorized to run orchestrations:
  - a. Select an orchestration workflow under **Orchestration Workflows**.
  - b. Click the **Data Mapping** tab in the **Property Editor**.
  - c. Under **Working Data**, add user account to the **userId** and **password** Default Values. These values will be used to authenticate the orchestration.
  - d. Repeat for all orchestrations in the process app.
3. Publish and deploy the updated process app to your environment. You are prompted to save your changes, and then the process app is then deployed to your environment. A confirmation message will appear in the **Message List** when the deployment is complete.
4. Repeat these steps for each of the process apps with orchestrations.





---

# Chapter 3: Setup and Configuration

This section explains how to set up and configure Serena Service Manager after you have promoted the solution files. These tasks must be done before you can use Service Manager.

- [Adding Auxiliary Data \[page 17\]](#)
- [Managing Users \[page 18\]](#)
- [Enabling Notifications \[page 24\]](#)
- [Configuring Request Center \[page 25\]](#)
- [Modifying Process Apps \[page 31\]](#)
- [General Modifications \[page 32\]](#)

## Adding Auxiliary Data

The Serena Service Manager makes use of data that is stored in auxiliary tables. These tables must be populated with some information in order to use the solution; however, the tables are meant to be added to as you add more information into your systems.

The auxiliary tables included with this solution include:



**CAUTION:** The bold tables in the list are populated by the solution. Use extreme caution when manually altering these tables.

- Categories (Knowledge Management)
- CI Categories (CMS, referenced by Incidents, Changes, and Problems)
- CI Sub-Categories (CMS, referenced by Incidents, Changes, and Problems)
- CI Sub-Category Types (CMS, referenced by Incidents, Changes, and Problems)
- Knowledge Base (Knowledge Management)
- **KP Published (Knowledge Center)**
- **KP UserRatings(Knowledge Center)**
- Model Numbers (CMS)
- **Relationships (CMS)**
- Relationship Types (CMS)
- Resolution Codes (Incident)
- Software Platforms (CMS)

- Symptom Codes (Incident)
- Vendors (CMS)
- **Workarounds (Problems)**

The non-bold tables have default values but can also be tailored for your needs. The values determine which selections are available when working with incidents, problems, changes, and CIs. The following topic explains how to add information to these tables.

## Managing Auxiliary Data

To add or edit data records to your auxiliary tables, choose one of the following:

- In the User Workspace, select **Search | Manage Data**, choose the table from the drop-down list, and then click **Create Item** or search for an existing item to edit.
- Create an Editable Grid listing report based on the auxiliary table, and then either create or edit items in the table.

For details, refer to the *SBM User Workspace Online Help*.

## Managing Users

To simplify the management of your users, roles have been created for the different applications. Administrators assign users to the appropriate roles, which gives the users the appropriate permissions and access to the applications.



**Note:** User and Multi-User field types refer to the roles for populating the lists. For example, the **Additional Contacts** field refers to all of the roles contained in the Incident Management application.

Managing users is a twofold process:

1. Create a user account in SBM.
2. Add the user account directly to a role or add the user to a group that is granted the role.



**Note:** The client which you use to add user accounts depends on your SBM installation. If you are using an on-premise version of SBM, add the users using the Web Administrator or the SBM System Administrator.

See the topics associated with each application for more information on the roles available in the application:

- [Incident Management Roles \[page 19\]](#)
- [Request Fulfilment Roles \[page 20\]](#)
- [Change Management Roles \[page 21\]](#)
- [Problem Management Roles \[page 22\]](#)
- [CMS Roles \[page 22\]](#)
- [Knowledge Management Roles \[page 23\]](#)

---

## Incident Management Roles

The following roles (or actors) are used in the Incidents workflow.



**Note:** The Incidents workflow and the Service Request workflow are in the Incident Management process app. These Level 1 Techs role is used in both of these workflows.

For on-premise installations, use the SBM System Administrator to assign users or groups to roles.

**Incident Manager** - The Incident Manager is responsible for the Incident Management/Request Fulfillment process. Other duties include:

- Ensure efficiency and effectiveness of the Incident Management/Request Fulfillment process
- Manage Incident Management/Request Fulfillment staff
- Provide for continuous service improvement for Incident Management/Request Fulfillment
- Produce KPI reports for management review
- Maintain the Incident Management/Request Fulfillment system
- Collaborate with other Service Manager processes such as Request Fulfillment, Problem Management, Change Management, and Configuration Management

**Level 1 Techs** - This role is for service desk staff or first level support who are responsible for handling incoming calls and e-mails. The responsibilities of this role include:

- Own incidents/requests from recording to closure
- Record, classify, and resolve incidents/requests as quickly as possible
- Collaborate with end users and technical SMEs with the goal of quickly restoring normal service operation
- Escalate incidents/requests appropriately
- Keep end users informed of incident/request status
- Ensure Service Levels are met
- Match similar incident/request records

**Level 2 Techs** and **Level 3 Techs** - This role is for Technical SMEs and advanced support staff responsible for further incident investigation and diagnosis. Their other tasks include:

- Resolve incidents that were not resolved at First level
- Escalate service level breaches to Incident Manager
- Inform Service Desk staff of incident status and resolution
- Identify matching workaround

- Record new workaround



**Note: Incident Operators** include all members in Level 1 Techs, Level 2 Techs, and Level 3 Techs.

**Incident Users** - This role is for the end users who will be submitting incidents, providing the necessary details to the Service Desk. IM User is the only role associated with the **Affected User** field.

**Incident Contacts** - This role is for the user accounts who should be available for selection in the **Additional Contacts** field.

**IM Administrator** - This role is responsible for administering Incident Management/Request Fulfillment, such as assigning users to roles or fixing SBM issues.

## Request Fulfilment Roles

The following roles (or actors) are available for the Service Requests workflow.



**Note:** The Incidents workflow and the Service Request workflow are in the Incident Management process app. The Level 1 Techs, Level 2 Techs, and Level 3 Techs roles are used in both of these workflows.

For on-premise installations, use the SBM System Administrator to assign users or groups to roles.

**Level 1 Techs** - This role is for service desk staff or first level support who are responsible for handling incoming calls and e-mails. The responsibilities of this role include:

- Own incidents/requests from recording to closure
- Record, classify, and resolve incidents/requests as quickly as possible
- Collaborate with end users and technical SMEs with the goal of quickly restoring normal service operation
- Escalate incidents/requests appropriately
- Keep end users informed of incident/request status
- Ensure Service Levels are met
- Match similar incident/request records

**Level 2 Techs** and **IM Level 3 Techs** - In Request Fulfillment, these roles are included as Incident Operators, and members of the roles can be selected as owners for the initial classification of a request.



**Note: Incident Operators** include all members in Level 1 Techs, Level 2 Techs, and Level 3 Techs.

**Business Approvers** and **Financial Approvers** - These roles are for the business and financial approvers who are responsible for verifying that a request meets the business and financial requirements.

---

**Incident User** - This role is for the end users who will be submitting requests, providing the necessary details to the Service Desk. Request User is the only role associated with the **Affected User** field.

**IM Administrator** - This role is responsible for administering Incident Management/ Request Fulfillment, such as assigning users to roles or fixing SBM issues.

## Change Management Roles

The following roles (or actors) are available in the Change Management process app. For on-premise installations, use the SBM System Administrator to assign users or groups to roles.

**Change Manager** - The Change Manager is responsible for the Change Management process, making sure that standard procedures for change are followed. Other duties include:

- Ensure efficiency and effectiveness of the Change Management process
- Manage Change Management staff
- Provide for continuous service improvement for Change Management
- Schedule regular configuration item verification and audits
- Produce KPI reports for management review
- Manage Forward Schedule of Change conflicts
- Conduct the Change Approval Board meetings on a regular basis
- Maintain the Change Management system
- Collaborate with other ITSM processes such as Problem Management, Issue Management, and Configuration Management

**Change Implementer** - This role is for change management staff who are responsible for implementing the change. The responsibilities of this role include:

- Own requests from implementation to closure
- Ensure that prior approval has been granted before executing the change
- Collaborate with requesters with the goal of implementing the requested change
- Inform change management staff of request status and resolution
- Coordinate with release management to ensure that processes are followed
- Provide Post Implementation feedback during PIR (Post Implementation Review)

**Change Requester** - This role is for the end users who will be submitting RFCs, providing the necessary details to the change implementers.

**Change Administrator** - This role is responsible for administering Change Management, such as assigning users to roles or fixing SBM issues.

## Problem Management Roles

The following roles (or actors) are available in the Problem Management process app. For on-premise installations, use the SBM System Administrator to assign users or groups to roles.

**Problem Manager** - The Problem Manager is responsible for the Problem Management process. Other duties include:

- Ensure efficiency and effectiveness of the Problem Management process
- Initiate proactive Problem Management initiatives
- Provide for continuous service improvement for Problem Management
- Monitor the quality and usefulness of problem records and known error information
- Produce KPI reports for management review
- Maintain the Problem Management system
- Collaborate with other Service Manager processes such as Incident Management, Change Management, and Configuration Management

**Problem Specialist** - This role is for Technical SMEs and advanced support staff responsible for problem investigation and diagnosis. The responsibilities of this role include:

- Perform investigation and diagnosis to determine the root cause of problems
- Identify, record, and update known error record
- Identify incident trends that might be caused by a technical error

**Problem Staff** - This role provides information to problem management staff as needed, including technical and business related details.

**Problem Submitters** - This role is problem submitters who are responsible for providing incident details to Problem Management staff.

**PM Administrator** - This role is responsible for administering Problem Management, such as assigning users to roles or addressing SBM issues.

## CMS Roles

The following roles (or actors) are available in the Configuration Management System process app. For on-premise installations, use the SBM System Administrator to assign users or groups to roles.

**Configuration Manager** - The Configuration Manager is responsible for the Configuration Management System and the CI Relationships. Other duties include:

- Ensure efficiency and effectiveness of the Configuration Management process
- Define Configuration management policy including scope
- Promote continuous service improvement for Configuration Management
- Produce KPI reports for management review

- 
- Schedule regular Configuration Item verification and audits
  - Maintain the Configuration Management system
  - Monitor the quality of the CI records and their usefulness to the other Service Manager processes, especially identity management, problem management, change management, and release management
  - Monitor the quality of CI information including CI-to-CI relationships
  - Develop methods and procedures for populating the CMDB

**Configuration Analyst** - This role is for configuration staff who are responsible for monitoring the CI records. The responsibilities of this role include:

- Coordinate Configuration management activities including CI identification, control, audit, and verification
- Collaborate with Change management on updating CI records
- Produce KPI reports

**Configuration User** - This role is for the end users who will be submitting new CIs or searching for CIs to relate to incidents, problems, or requests.

**Demo Data Viewer** and **Demo Report Viewer** - These roles are for users who are demoing Serena Service Manager. These roles have view-only privileges to either the CMS data or the CMS reports.

## Knowledge Management Roles



**Tip:** After adding users to the roles described below, set default values for the Publisher and Contributor fields at the project level. The default values prevent possible permission errors which can result when Knowledge Management articles are submitted from other process apps.

The following roles are available in the Knowledge Management process app. For on-premise installations, use the SBM System Administrator to assign users or groups to roles.



**Note:** Members in all of these roles are available for selection when an item is sent for approval.

**Editor/Publisher** - The Publisher is responsible for editing, approving, and publishing Knowledge Center articles.

- Submit new articles to add to Knowledge Center
- Start the update process by submitting items for existing Knowledge Center articles
- Approve articles before they are published, ensuring that Knowledge Center articles meet the accepted standards

**Contributors** - The Article Writer is responsible for adding content to Knowledge Center articles. Other duties include:

- Add content to articles that are in the **Edit** state.

- Edit existing knowledge base articles that have been re-opened
- Review and approve content of an article written by another contributor

**Announcement Contributors** - The Announcement Contributor has the same privileges as the Contributor. In addition, the Announcement Contributor has the ability to publish announcements without requiring Publisher approval.

**KM Administrator** - This role is responsible for administering Knowledge Management, such as assigning users to roles, fixing SBM issues, or restoring deleted items.

## Enabling Notifications

Notifications keep users and staff aware of changes to items. These notifications are contained in the application snapshots that were promoted during installation.

After the snapshots have been promoted, the administrator must grant **allow subscription** privileges to the users who will subscribe to the notifications. Once a user has been allowed subscription to a notification, the administrator can subscribe the user to a notification. For on-premise installations, the administrator grants these privileges using the SBM System Administrator.

Users manage subscriptions on the **Notifications** tab of their User Profile. The users can subscribe or unsubscribe to notifications.

Service Manager contains specialized notifications and notification templates in addition to the default notifications usually available with SBM applications. The following notifications are the default ones available for a deployed process app.

- Any [item] changes owner
- Any [item] changes state
- Any [item] changes to inactive
- Any [item] I submitted changed state
- Any [item] I submitted changed to inactive
- Any [item] is submitted
- I become the owner of any [item]

The following table explains the additional or modified notifications available with each process app:

Application	Notification Name	Change to Rule
Incident Management	IM - Any Incident is Submitted	Notifies <b>Reported By</b> and <b>Affected By</b> user when incident is submitted.



Application	Notification Name	Change to Rule
Incident Management	IM - Automatic Escalation to L2	Notifies when change moved to <b>Investigation &amp; Diagnosis</b> state.
Incident Management	IM - Resolved	Notifies <b>Reported By, Affected By,</b> and <b>Additional Contacts</b> users when incident is moved to <b>Resolved</b> state.
Incident Management	IM - Resolved Repeat Cancel	Notifies user when incident moves from <b>Resolved</b> state.
Incident Management	IM - Resolved with Workaround	Notifies <b>Reported By, Affected By,</b> and <b>Additional Contacts</b> users when incident is moved to <b>Resolved by Workaround</b> state.
Change Management	CM - Change Submitted	Notifies the submitter when a change has been submitted.
Change Management	CM - Change Closed	Notifies the submitter and the user selected as the contact when the change is closed.

Service Manager also contains specialized templates. For on-premise customers, these templates are prefixed by ITSM and are installed into the notification templates directory:

```
SBMinstallationDirectory\Serena\SBM\Application
Engine\emailtemplate\notificationtemplates
```

## Configuring Request Center

Request Center is the simplified end user interface that allows end users to easily interact with the IT Services found in Service Manager. Request Center eliminates confusion for the user by removing the advanced functionality available in the User Workspace.



**Important:** Before accessing Request Center, promote all of the snapshots to your environment. This will allow the demo data to be available in Request Center when you log in.

Request Center is accessed at the following URL: `http://serverName/tmtrack/tmtrack.dll?shell=srp`.

If the SBM User Workspace is displayed instead of the Request Center when you access the URL, verify that:

- Request Center has been installed by running the Service Manager installer.
- IIS Web Server has been restarted after installing Service Manager.

Request Center requires customization before end users can access service operations.

The following topics explain how to customize Request Center:

- [Adding Categories \[page 26\]](#)
- [Adding Service Actions \[page 27\]](#)
- [Changing Logo, Announcements, and Contact Information \[page 29\]](#)
- [About the Image Picker \[page 30\]](#)



**Important:** Any customizations made to Request Center affect all users.

## Adding Categories

Categories allow you to group service actions for easy navigation by users.

**To add a new category:**

1. Log in to Request Center (<http://serverName/tmtrack/tmtrack.dll?shell=srp>) with a user account that has administrator privileges.



**Restriction:** For on-premise installations, the administrator needs either a **Regular User** license and **Remote Administration** privilege or a **Managed Administrator** license and **Global Administration** privilege.

2. Select **Customize | Service Catalog**.
3. Click **+ Category** button.
4. Choose an image for the service by clicking **Change image**. You can choose from existing images or insert a URL. For best results, use an image that is 48 x 48 pixels. For information on the image picker, see [About the Image Picker \[page 30\]](#).
5. Enter a **Name** and **Description** for the category.
6. Click **Save** to save the new category.

The new category will appear in the selection list. The categories are arranged in alphabetical order.

**To edit, clone, or delete a category:**

1. Select **Customize | Service Catalog**.
2. Select the category to edit, clone, or delete.

3. Click on the appropriate icon to edit, delete, or copy the category.



## Adding Service Actions

IT service actions are available to end users through Request Center. Service actions allow you either to submit a new item into a Service Manager process or to access a URL. Service actions are laid out in a user-friendly format within Request Center. Users can browse services by their category or by searching for them with the search filter.

### To add a new service action:

1. Log in to Request Center (<http://serverName/tmtrack/tmtrack.dll?shell=srp>) with a user account with administrator privileges.
2. Select **Customize | Service Catalog**.
3. Click **+ Service** to add a new service operation.
4. Choose an image for the service by clicking **Change image**. You can choose from existing images or insert a URL. For best results, use an image that is 32 x 32 pixels. For information on the image picker, see [About the Image Picker \[page 30\]](#).
5. Enter a **Name** and **Summary** for the new service operation. The summary appears as a quick description in Request Center.
6. Change the **Category** by choosing the category from the drop-down menu.



**Tip:** Selecting a category before clicking add service will prepopulate the category field with the selected category.

7. Enter a longer description in the **Description** box. The long description appears when the end user expands the service action in Request Center.
8. Enter the **Service Level** expectation and **Charge Back** cost. Service level expectation is a description of the service level that the end user should expect. The Charge Back cost is the cost that end user or the end user's department will incur due to the successful completion of the service action. Note that these fields only display to the end user in Request Center when values are entered for the fields.
9. Choose to display the service operation under the **Favorite**, **What's New**, and **Featured** sections under the home view of the Catalog tab by checking all that apply.

10. Select the option either to submit into an SBM process app or to access an external URL:
  - For an SBM process app, select the process app and project to submit into. You can tailor the submit form to choose a particular **Item Type** or by prepopulating the **Title** field for the new item.



**Note:**

- If the user does not have permissions to submit into the application or project, the service will not appear in Request Center for that user.
- The **Query at Runtime** option in the project drop-down allows the user to select the project when submitting an item.
- The default Submit form for the project is used to submit new items into the project.
- The **Item Type** and **Title** are populated based on the selected process app and project.



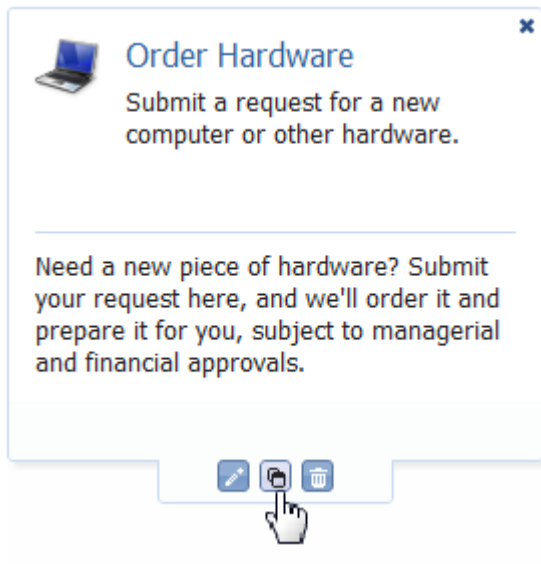
**Important:** Choose a project that allows submissions. If the project does not allow submissions, then the user will receive an error when selecting the service. The following is a sample error:

```
An error occurred while processing the last request.  
....  
Project doesn't allow submitted items:
```

- For external Web page, enter the URL in the field. Choose whether to display the link within the Request Center or in a new window.

**To edit, clone, or delete a service action:**

1. Select **Customize | Service Catalog**.
2. Select the service action to edit, clone, or delete.
3. Click on the appropriate icon.



## Changing Logo, Announcements, and Contact Information

The look and feel to Request Center is easily customizable, allowing you to tailor the portal. Possible changes that you can make include:

- Changing the graphic that is displayed in the title bar
- Modifying the information and hyperlink that appears alongside the graphic
- Turning off or on the announcements that are added to Knowledge Center
- Changing the contact information that appears in the **Contact Info** link



**Important:** Remember that Request Center customizations affect all users.

### To customize the display properties of Request Center:

1. Log in to Request Center (<http://serverName/tmtrack/tmtrack.dll?shell=srp>) with a user account with administrator privileges.
2. Select **Customize | Request Center**.
3. Change any of the following:

Customization	Notes
Title	The title appears alongside the logo. You can apply formatting to the text using the formatting toolbar.
Image (URL)	Enter a URL to your corporate logo. Remember this URL must be accessible by all users from Service Manager. For example, do not enter a logo that is located in a restricted domain that is inaccessible by all users.

Customization	Notes
Image Link	Enter a URL which a user will be directed to if they click on the logo.
News/ Announcements	Select <b>Show in Request Center</b> to display urgent announcements to users in the announcement bar, underneath the banner. You can set the <b>Refresh Interval</b> for the urgent announcements by selecting the minutes for a refresh.  For more information on creating and publishing urgent announcements, refer to the chapter on Knowledge Management in the <i>Serena Service Manager Guide</i> .
Contact Info	Add a title and content for the contact info link. The title affects both the dialog title and the link name. HTML is not supported in the title field.  The contents appear in the dialog. Use the formatting toolbar to apply styles and formatting to the content.  You can hide the Contact Info link by deselecting <b>Show in Request Center</b> .

4. Click **Save**.

## About the Image Picker

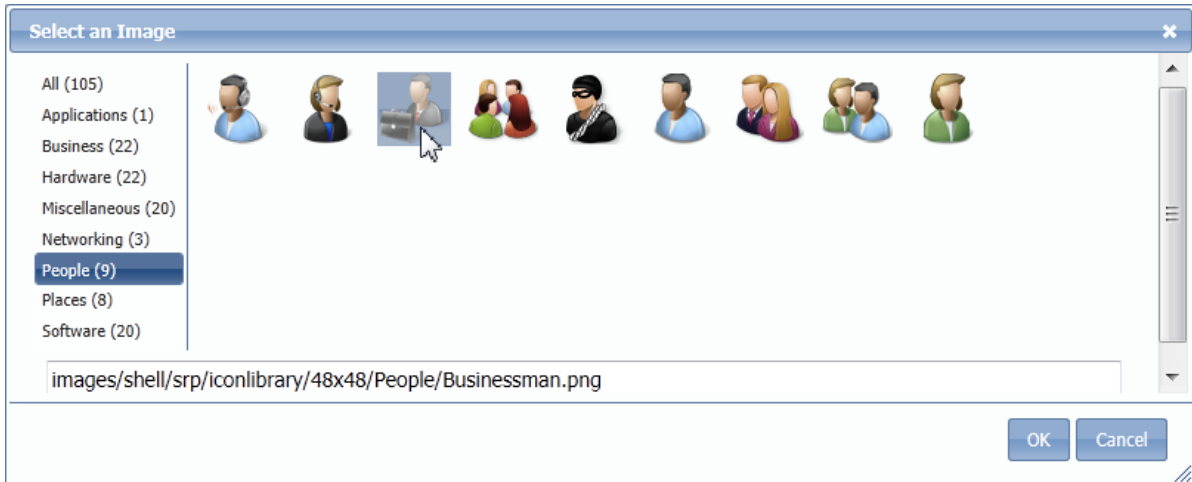
The image picker that is used to pick images for categories and services in Request Center, as well as for picking images when creating Knowledge Management categories.

The image picker comes with a collection of images that are arranged into multiple groups. You can choose to view all images or select a group to view only images in that group.

Choose the image by selecting the image and clicking **OK**.



**Tip:** Instead of picking the image, you can insert a URL to an image in the text field. Remember that the image location must be accessible by all Request Center users.



## Adding New Images to Image Picker

On-premise installations can add new images to the image picker. The administrator must perform the following steps on the SBM Server:

1. Add the new PNG image files to the 32x32 or 48x48 folders in the following directory:

```
SBMinstallationDirectory\Serena\SBM\Application
Engine\bin\images\shell\SRP\iconlibrary
```

The image size should be 32 by 32 pixels in the 32x32 directory. This directory is used for the services. The image size should be 48 by 48 pixels in the 48x48 directory. This directory is used by both Request Center categories and **KM Categories**.

2. Update the **serviceimages.js** and **categoryimages.js** files to include the new images. These files are found in the following directory:

```
SBMinstallationDirectory\Serena\SBM\Application
Engine\bin\javascript\shell\SRP
```

## Modifying Process Apps

SBM Composer is used to modify process apps, applications, and orchestrations. This includes designing states, transitions, forms, actions, and other elements. You also use SBM Composer to create new roles and tie the roles to particular states or transitions.

To modify the process apps using SBM Composer:

1. Open the process app in SBM Composer by clicking **Composer Button | Open | Application Repository** and selecting the process app.
2. Repeat for all Service Manager process apps. This allows reference information to be loaded into SBM Composer local cache.



**Important:** Open all process apps in SBM Composer before attempting to edit. The apps reference each other, and if one is not imported into SBM Composer, you may get validation errors.

3. Open the process app to modify.
4. Modify the process app.
5. Deploy the changes to your server.

For more information on using SBM Composer, refer to *SBM Composer Guide*.

## General Modifications

The following sections address questions about some basic modifications that you can make to the process apps.

### Can I use my existing Incident process app?

You can link your existing SBM Incident process app to the Change Management, Problem Management, and CMS process apps found in the Serena Service Manager. The procedure for doing this is beyond the scope of the book, and it is suggested that you contact Serena Professional Services for help.

### Can I use my existing auxiliary tables?

You may have an existing auxiliary table that you want to link to one of the process management apps. For example, you may have an existing table of Vendors and you do not want to copy all of the data to the Vendors table included with Serena Service Manager.

You can do this by editing the process apps in SBM Composer. For details, see *SBM Composer Guide*.

### Can I edit the default reports?

You may edit the default reports that are included with Serena Service Manager. When saving edited reports, remember to save the reports under a new name. This will prevent your changes from being overlaid when you upgrade to the next version of Serena Service Manager.

### Can I customize my Request Center?

When you choose the **Customize** option on the Request Center portal, the changes affect all users.



---

## Chapter 4: What's New in Serena Service Manager 2.0.0?

The following features and changes are new in Service Manager.

### Request Center

Request Center is the new portal for Service Manager end users. Through Request Center, end users can access important and pertinent information quickly, without having to learn to navigate the User Workspace.

Request Center provides the ability to browse the service catalog, view submitted requests, and search for Knowledge Center articles. From the service catalog, users can submit requests into applications or access specific URLs as determined by the IT Administrator. The Requests view allows end users to view items that they have submitted, alerting them if any item requires action such as adding information. Request Center allows users access to articles within Knowledge Center.

For more information, see *Serena Service Manager User's Guide*.

### Knowledge Center

Knowledge Center is a new knowledge base feature included with Service Manager. Users access Knowledge Center through the Request Center portal, including receiving IT announcements and searching Knowledge Center articles.

Knowledge Center announcements appear to all users in the announcements bar when they log in to Request Center. These announcements alert users to important IT events, such as possible outages. Announcements reduce the number of service requests since the alert may answer common questions that end users have.

End users can also become self-sufficient by accessing the articles within Knowledge Center. From the Knowledge Center view in Request Center, users can search the Knowledge Center for related articles. Users can then comment and rate the articles that they find, giving IT feedback on which articles are being consumed and which articles may need to be rewritten for clarity.

Both the Knowledge Center articles and announcements are managed with the Knowledge Management process app.

For more information, see *Serena Service Manager User's Guide*.

### Knowledge Management

The new Knowledge Management process app manages your Knowledge Center articles and announcements.

The Knowledge Management workflow lets you track new knowledge base articles as they receive the necessary approvals before being published for public viewing. This process ensures that items receive the appropriate reviews before being seen by end users. If an existing article requires edits, these edits receive the same scrutiny as they progress through the same Knowledge Management workflow.

Knowledge Management also provides the ability for IT departments to create announcements that appear to end users in Request Center. The announcements are used for important notices that will only apply for a limited time, after which they are automatically removed from the display.

For more information, see *Serena Service Manager User's Guide*.

## Request Fulfillment

Request Fulfillment is a new Service Manager process app for managing service requests. Service requests are a request for a service to be provided, such as a request for a new laptop or a request for information. Service requests differ from incidents, because they are not accompanied by a service interruption.

Service requests may be entered by users directly or they may be spawned from an incident. For example, a user may open an incident because applications are not responding. Upon investigation, IT finds that a user's machine has run out of disk space, so IT opens a service request to add a new hard drive to the user's machine.

Requests that an end user submits can be accessed from the Requests view within Request Center. Users can add any additional information necessary to the request directly from Request Center.

For more information, see *Serena Service Manager User's Guide*.

## Risk Calculator

The Change Management application now includes the Risk Analysis calculator. The Risk Analysis calculator includes a risk survey form, where information is gathered about the extent of the risk this change poses. Based on the responses to the survey, the inherent risk is calculated for the change. The Risk Calculator survey is easily modified to meet your company's risk model. The calculated risk appears on the **Risks** tab when viewing a change.

The Risk dashboard uses the results in the Risk Calculator to help change management staff monitor the risk of upcoming changes. The dashboard includes a report that shows the ratio of RFCs that have completed surveys compared to those that do not.

For more information, see *Serena Service Manager User's Guide*.

## Solution Files

The Service Manager solution is now delivered as solution files that are imported and promoted using SBM Application Administrator. The new solution file delivery method allows all components of the solution, such as notifications and reports, to be included when you import and promote the solution.

Previous versions of Service Manager required that on-premise installations start with the sample database provided with Service Manager. The sample database was the only way to receive the reports and notifications included with Service Manager.

For more information, see [Chapter 2: Installing On-Premise \[page 7\]](#).

## 2009 R4.02 Enhanced Functionality

The following features which were made available in Serena Business Manager R4.02 are incorporated in this new release of Service Manager:

- 
- The Application Names have been changed in SBM Composer. The names now have an **SSM** prefix. This prevents possible naming collisions with existing applications. This change will not affect upgrades to existing installations, because the internal ID remains the same.
  - The transition buttons that appear on transition and state forms have been updated to make use of the **transition control** feature. The transition buttons in Service Manager are no longer unique images. The button text is now automatically updated when you modify the transition name within SBM Composer.
  - The ability to add and edit relationships has been updated to use the **Editable Grid**, which allows users to submit or modify relationships in a grid layout directly from the **Relationships** tab.
  - The **Post Problem** and **Merge Incident** transitions in Incident Management have been implemented using an *Any to Any* transition with decision nodes.
  - Embedded reports and the Relationship Explorer have been changed to make use of the sub-relational IDs. These IDs eliminated the need for orchestrations which monitored changes to the auxiliary tables and then updated a field within the primary table with a new auxiliary item IDs when new auxiliary items were added. Both the orchestrations and fields have been removed from the solution.



---

## Chapter 5: Upgrading

This section explains how to upgrade from a previous version of Serena Service Manager.

- [About Upgrading \[page 37\]](#)
- [Updates in Serena Service Manager 2.0.0 \[page 37\]](#)

### About Upgrading

We can think of the Serena Service Manager as being divided into two separate components: the framework files and the solution files. This separation of framework features from process apps helps to prevent the installer from overlaying any customizations that you have made to your process apps while still allowing you to install the latest enhancements to the framework.

The **framework files** include new templates, images, and pieces of code that enable new features in your Serena Service Manager installation. These pieces of code are backwards compatible, and they do not affect any modifications that you have made to your process apps. These files are installed automatically by the installer, and they should not affect any customizations that you have made.

For example, the addition of Request Center requires that new HTML templates are installed on your SBM Server. These templates do not affect your current installation; however, they enable the new Request Center feature.

The **solution files** are process app snapshots and blueprints which contain the latest changes to the process workflows and data models. Since you have probably modified the process apps in your Service Manager installation, these files are not automatically installed into your environment. You can choose to promote them, or you can view the changes to the process apps within SBM Composer, and then decide if you want to manually implement the enhancements.

### Updates in Serena Service Manager 2.0.0

The following changes were made to the Serena Service Manager process apps. You can manually add the changes to your existing process apps. Manually comparing your existing apps to the new apps allows you to choose which changes are applied to your new apps and it prevents the loss of changes that you have already made.

The following are changes that were made to existing process apps:

- Service Request workflow and Task workflow were added to the Incident Management application. These two workflows are linked by a subtask transition. A **Recategorize** transition was added to move items between the Service Request workflow and Incident Management workflow.
- Binary fields and decisions steps were added to each workflow to trigger the creation of Knowledge Management articles. The article type created depends on the process app.

- Addition of new roles, Business Approvers and Financial Approvers to the Incident Management application.

These other features are not required but would have to be manually implemented:

- Application names for existing applications have been changed to include the SSM prefix. For example, **SSM - Incident Management**.
- Risk Analysis Questionnaire in the Change Management workflow will have to be added manually. This includes adding the appropriate risk analysis fields, adding the JavaScript, and adding the fields and JavaScript to the forms.
- The transition buttons that appear on transition and state forms have been updated to make use of the **transition control** feature. The Service Manager transition buttons are no longer unique images, which means that the button text is now automatically updated when you modify the transition name within SBM Composer.
- The ability to edit relationships has been updated to use the **Editable Grid**, which allows users to modify relationships in a grid layout directly from the **Relationships** tab.
- The Post Problem and Merge Incident transitions in Incident Management have been implemented using an *Any* to *Any* transitions with decision nodes.
- Embedded reports and the Relationship Explorer have been changed to make use of the sub-relational IDs. These IDs eliminated the need for orchestrations which monitored changes to the auxiliary tables and then updated a field within the primary table with a new auxiliary item IDs when new auxiliary items were added. Both the orchestrations and fields have been removed from the solution.

---

## Chapter 6: Additional Information

This chapter has some additional information to understanding Serena Service Manager.

- [Integrations Between Applications \[page 39\]](#)
- [Additional ITIL References \[page 39\]](#)

### Integrations Between Applications

The following sections explain the different links between items.

#### Related CIs

Once a CI is related to an item in another process, the information from that CI can be found within the other management process. For example, once an item is assigned to a CI, any CIs related to that CI appear on the Relationships tab for the item. This allows other management teams to gather necessary CI status information, and to create reports to determine if any particular CI is related to multiple problems.

CI status is also used for workarounds, which are related to a particular CI. This allows users to find possible solutions to a problem based on the item which is causing the problems. They can also search for solutions based on the CIs that are related to the item giving them problems.

#### Relational Fields

All of the process apps have relational fields that point to other applications. For example, the Problem Management application has relational fields that point to the CMS and CI items. This allows you to relate Configuration Items with problems and select from the same CI Categories.

#### Post-Transitions

Many of the process applications use post-transitions to submit items into other applications.

For example, the Problem Management application contains the **Post RFC** transition, which creates a request in the Change Management application.

#### Storing File Attachments

Attachments to items may be stored in SBM or in Microsoft Office SharePoint, depending on what options you have enabled with SBM. Serena offers SBM Connect for SharePoint<sup>®</sup>, a connector to SBM which allows you leverage the file management capabilities of SharePoint with SBM. For more information about SBM Connect for SharePoint<sup>®</sup>, refer to *Integration Guide for SharePoint* or contact Serena support.

### Additional ITIL References

The following sites contain additional information about ITIL standards.

- **OGC Official ITIL® Website:** <http://www.itil-officialsite.com>
- **Wikipedia Article on IT Service Management:** [http://en.wikipedia.org/wiki/IT\\_Service\\_Management](http://en.wikipedia.org/wiki/IT_Service_Management)
- **itSMF International - The IT Service Management Forum:** <http://www.itsmfi.org/>