FAQ
(Frequently Asked Questions)

Author: Rosana Godinho
Translator: Tatiana Trindade

Version 1.0
06/15/2016

Contents

1. What should I do to enable the Citsmart Portal?

To allow the user access to the Citsmart Portal, this should be enabled as follows:

1. To access the functionality of **Citsmart's Parameters**, through the main menu navigation (**System** > **Citsmart Parameters**). Will be presented the **Citsmart's Parameters** screen, click the tab of the **Citsmart's Parameter Search**. Once this is done, will be presented the screen to search for parameters;

    a. Perform the search parameter "46-Enable Portal as Citsmart home screen?" and select this. After this, will be presented the screen of parameter registry with the contents of the selected record, as illustrated in the figure below:

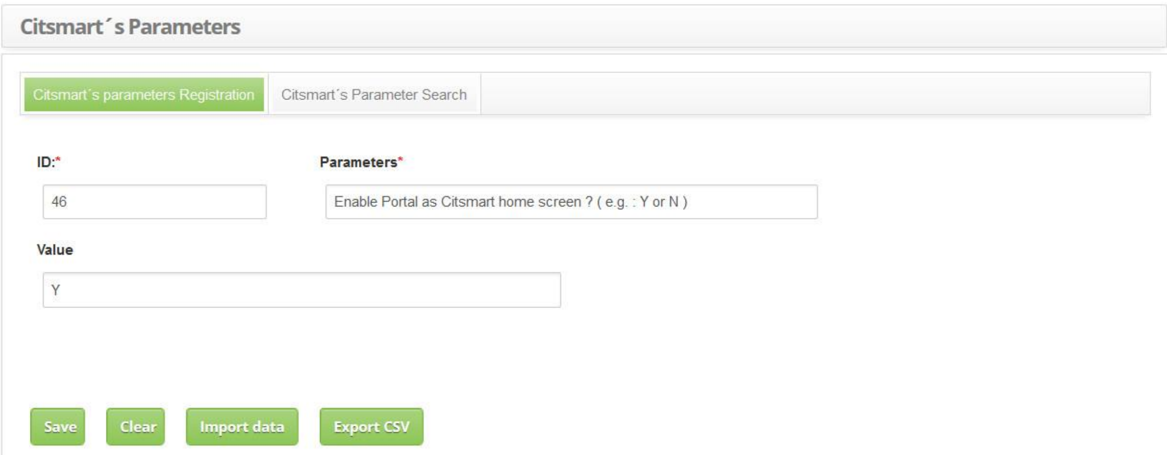


Figure 1 - Configuration of Parameter 46

- In the **Value** field, enter the value "Y" to enable the portal as home screen of ITSM Citsmart. After that, click on the Save button to perform the operation. In this case the date, time and user will be automatically stored for a future audit.

2. After configure the parameter, when log into the system, will be displayed as the Citsmart Portal home screen, as shown in the figure below:

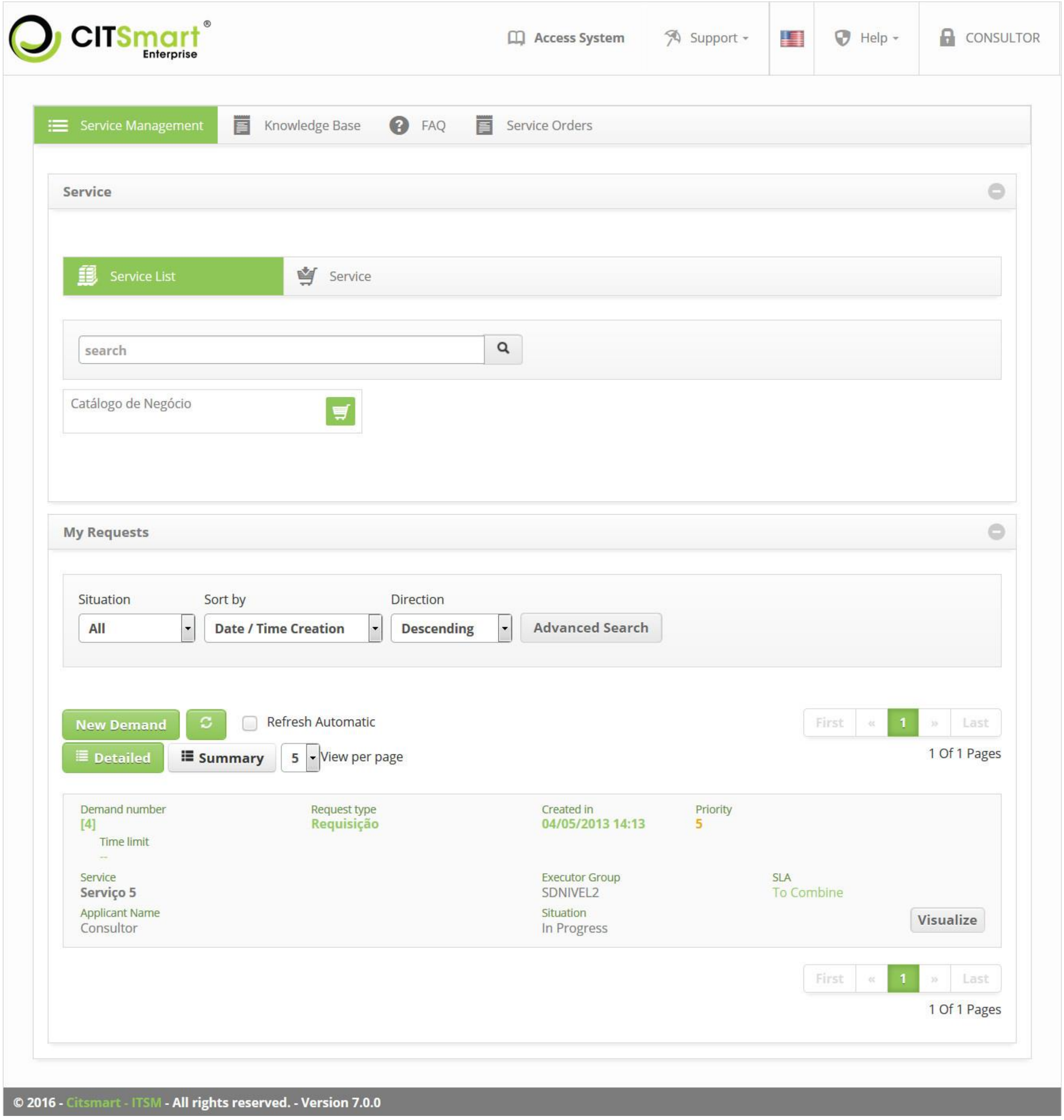


Figure 2 - Citsmart Portal

2. How to relate Staff (users) with the Group?

There are two ways to relate staff (users) to the groups:

From the Group Registration

1. Access the **Group Registration** functionality, through the main menu navigation. Position the mouse on the **General Registration** > **Staff**

Management > **Group**;

2. The **Group Registration** screen will be displayed. If the group is already registered in the system, perform the search and select this group (see item 5.9.2. in the user's guide). Once this is done, will be displayed the group registration screen of this group;

   a. Click the icon of **Staff** field. Will be displayed the screen for staff registration;

   b. Perform the search of the staff that will be linked to the group and select this. After that, the staff will be linked to the group as illustrated in the figure below:

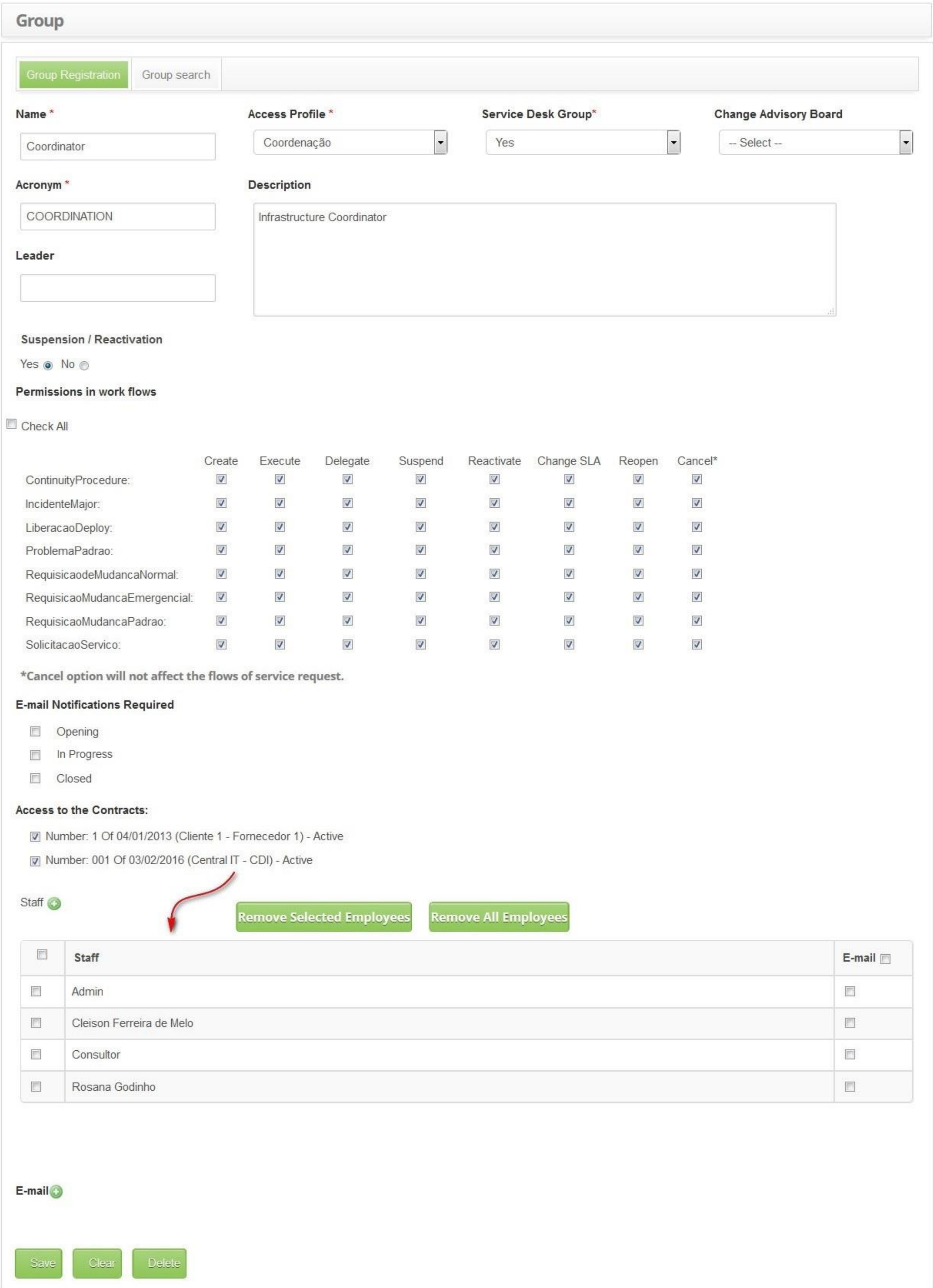


Figure 3 - Link of staff (users) with group

c. After the link, click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

From the User Registration

> **NOTE:** When the user registration screen is open, is possible to view the group to which the user has been linked from the group registration.

1. Access the **User Registration** functionality through the main menu navigation. Position the mouse on **General Registration** > **Staff Management** > **User**;
2. The **User Registration** screen will be displayed. If the user is already registered in the system, perform the search and select the user (see item 5.10.2 in the user's guide). Once this is done, the user registration screen will be displayed;
    a. Click the icon of the **Group** field. Will be displayed the screen for group search;
    b. Perform the search for the desired group and select this. After that, the user will be linked to the group as shown in the example shown in the figure below:

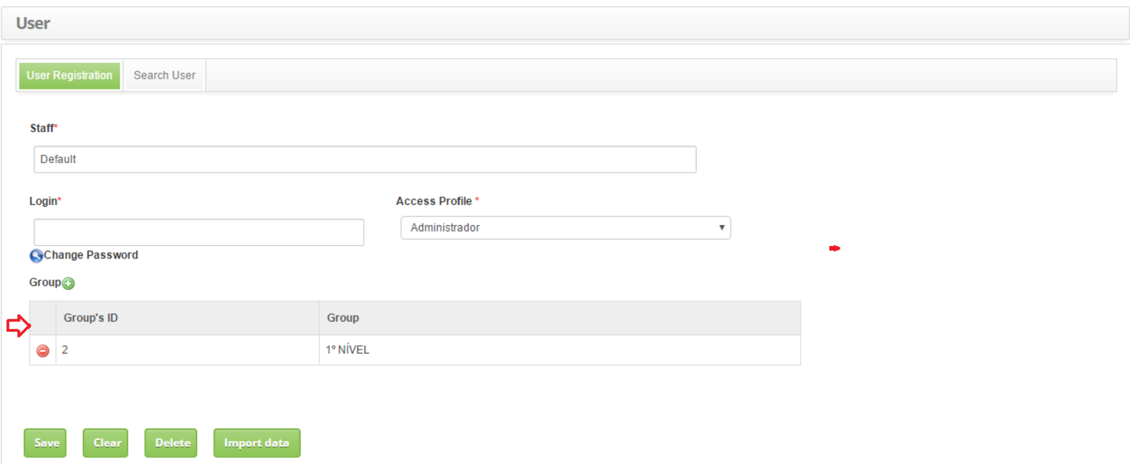


Figure 4 - Link groups with a user

c. After the link, click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

3. How to relate a group with contract?

To relate a group with a contract, proceed according to the guidelines below:

1. Access the functionality of **Citsmart Parameters** via the main menu navigation. Position the mouse on the **System** option and click the **Citsmart Parameters**. Will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presented the search screen of parameters;

   a. Perform the search parameter "41 - Control the link between employees and contracts (e.g. Y or N)?" and select this. After this, the screen of parameter registration will be presented with the contents of the selected record, as illustrated in the figure below:

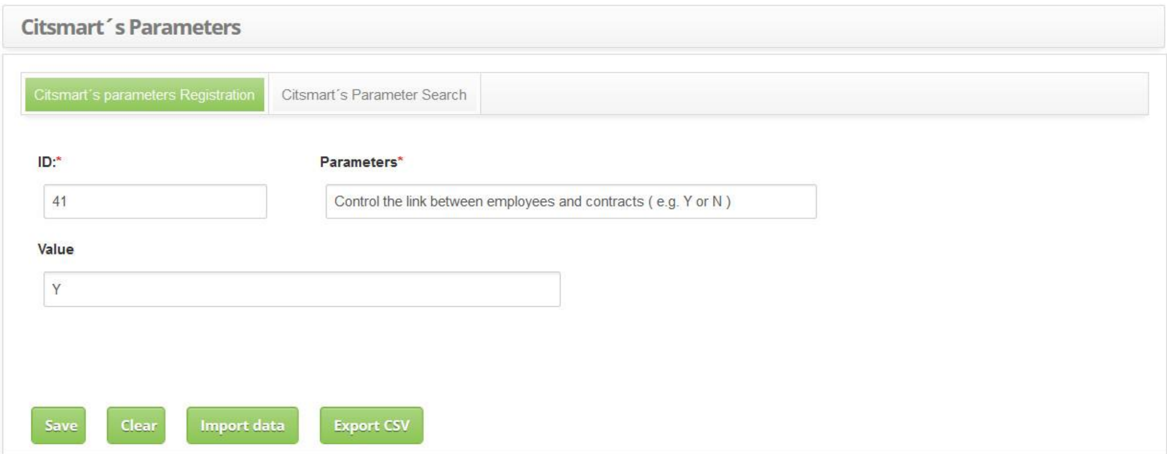


Figure 5 - Configuration of Parameter 41

- In the **Value** field, enter the value "Y" to be displayed the contracts in the group registration screen. Once this is done, click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

2. After configure the parameter, access the group registration functionality through the main menu navigation (**General Registers** > **Staff Management** > **Group**). The Group Registration screen appears, displaying the contracts as indicated in the example illustrated below:

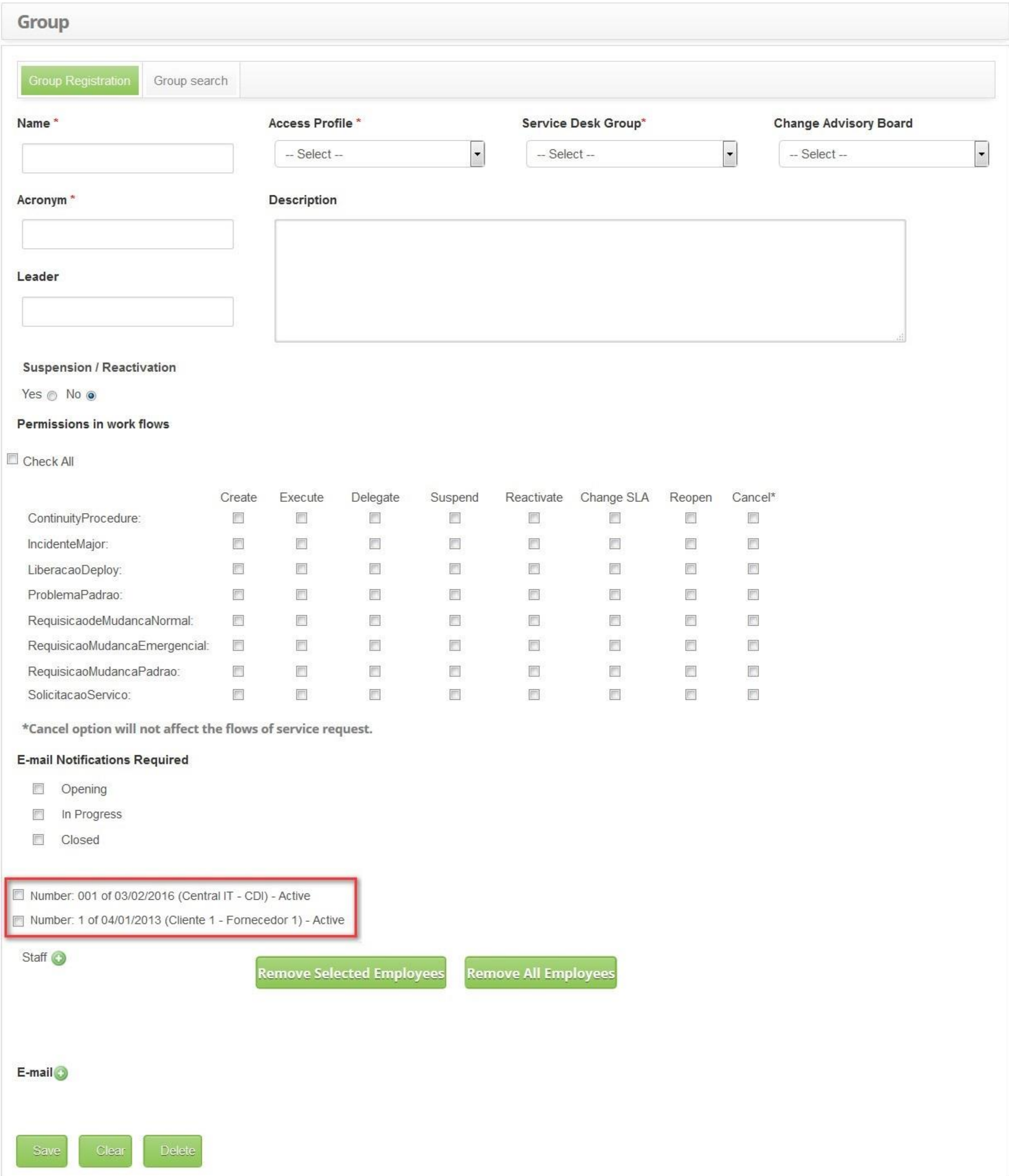


Figure 6 – Group Registration Screen

3. If the group to which requires link to contract is already registered in the

system, perform the search and select the same (see item 5.9.2. in the user's guide). Once this is done, will be displayed the registration screen of the particular group;

a. Select the contracts to which the group will be linked. After that, click on the Save button to perform the operation. The date, time and the user will be automatically stored for a future audit.

4. How to relate a unit with a contract?

To relate a unit with a contract, proceed according to the guidelines below:

1. Access the functionality of **Citsmart Parameters** via the main menu navigation. Position the mouse on the **System** option and click the **Citsmart Parameters**. Will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presented the search screen of parameters;

    a. Perform the search parameter "61 - Link contract to units" and select this. After this, will be presented the parameter registration screen with the contents for the selected registry, as illustrated in the figure below:

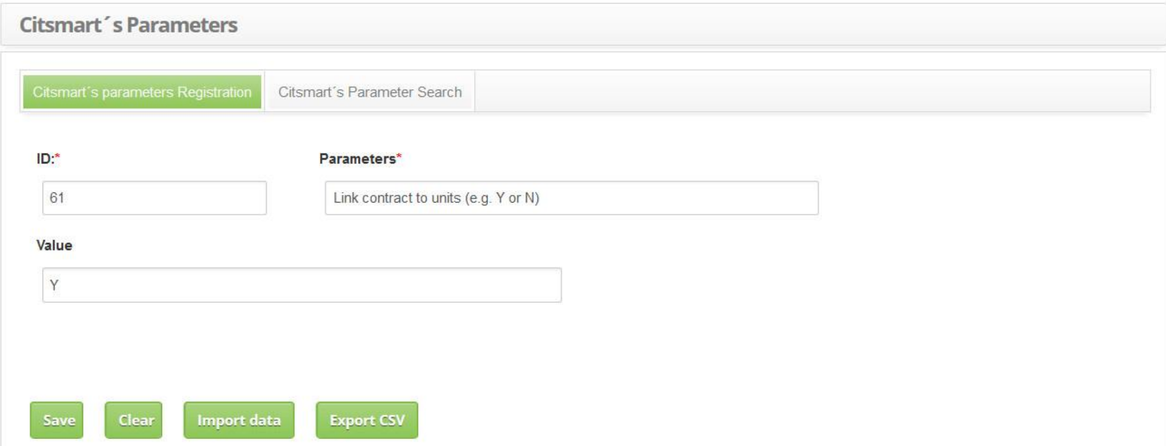


Figure 7 - Configuration of Parameter 61

- In the **value** field, enter the value "Y" to be displayed the contracts on unit registration screen. Once this is done, click on the Save button to perform the operation;

2. After configure the parameter, access the unit registration functionality through the main menu navigation (**General Registers** > **Staff Management** > **Unit**). The Unit Registration screen appears, displaying the contracts as indicated in the example illustrated below:

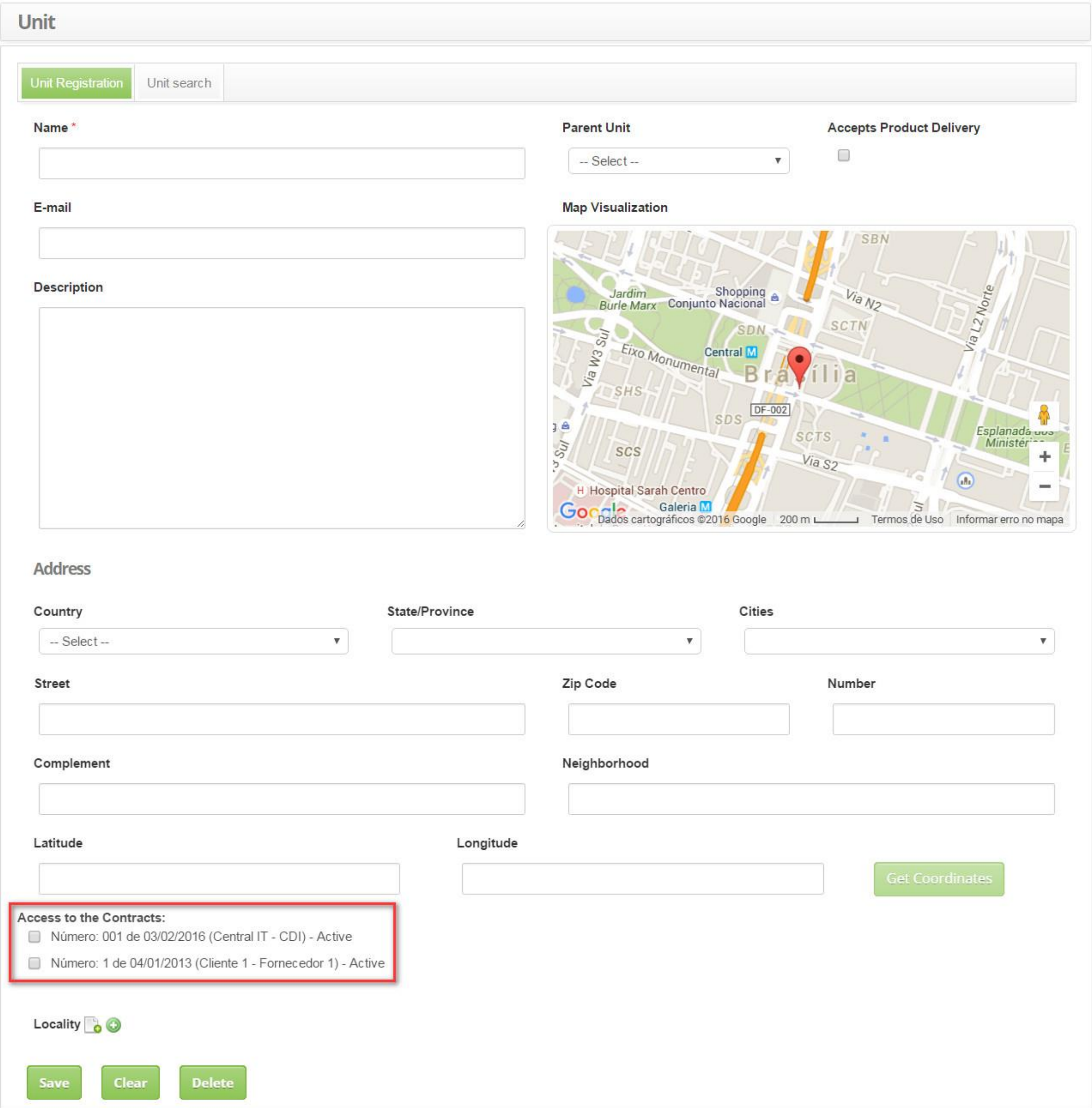


Figure 8 - Link of unit with contracts

3. If the unit to which requires link to contract is already registered in the system, perform the search and select the same (see item 5.5.2. in the user's guide). Once this is done, will be displayed the registration screen

of the particular unit;

a. Select the contracts to which the unit will be linked. After that, click on the Save button to perform the operation. The date, time and the user will be automatically stored for a future audit.

5. How to set a default group for the attendance of first level of a service request?

To set a default group for 1st level attendance, proceed according to the guidelines below:

1. Access the functionality of Group Registration via the main menu navigation (**General Registration> Staff Management > Group**). Will be presented the Group Registration screen, displaying the contracts as indicated in the example illustrated below.

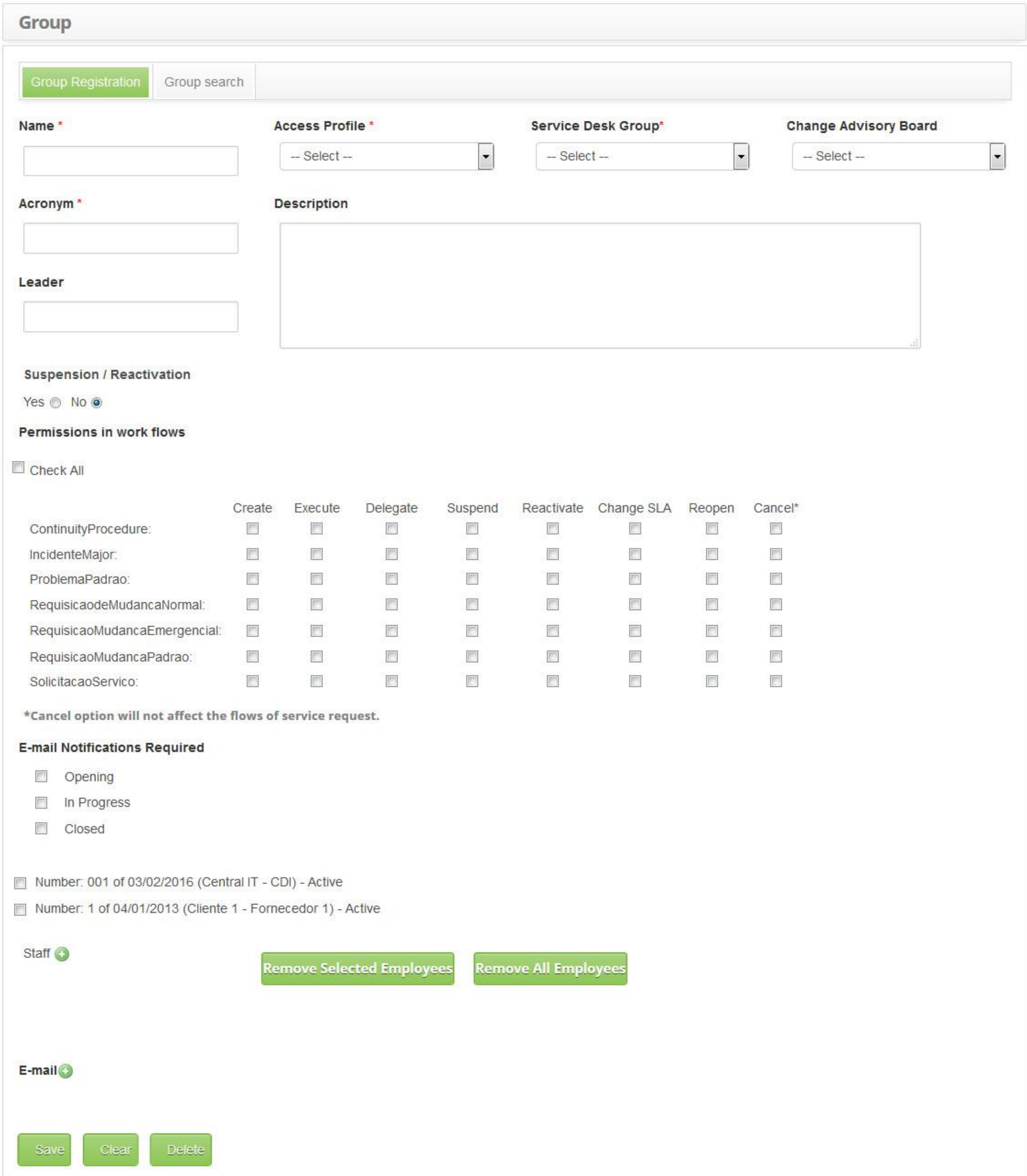


Figure 9 – Group Registration

2. If the 1st level group is not registered, proceed with the completion of fields as guidelines contained in the topic 5.9.1. of the user's guide.

3. If the 1st level group is already registered in the system, perform the search and get the identification number (ID). The figure below illustrates an example:

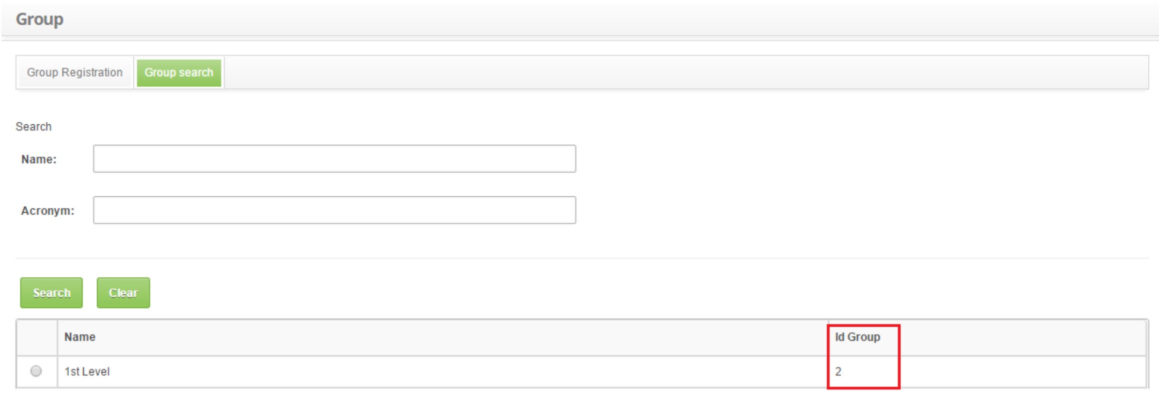


Figure 10 – Group Search

4. After obtaining the ID of 1st line support, access the functionality of Citsmart Parameters via the main menu navigation. (**System > Citsmart Parameters**). Will be presented the Citsmart Parameters screen, click the Citsmart Parameters search tab, perform the search parameter "ID-9 First-line Support ID" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below:

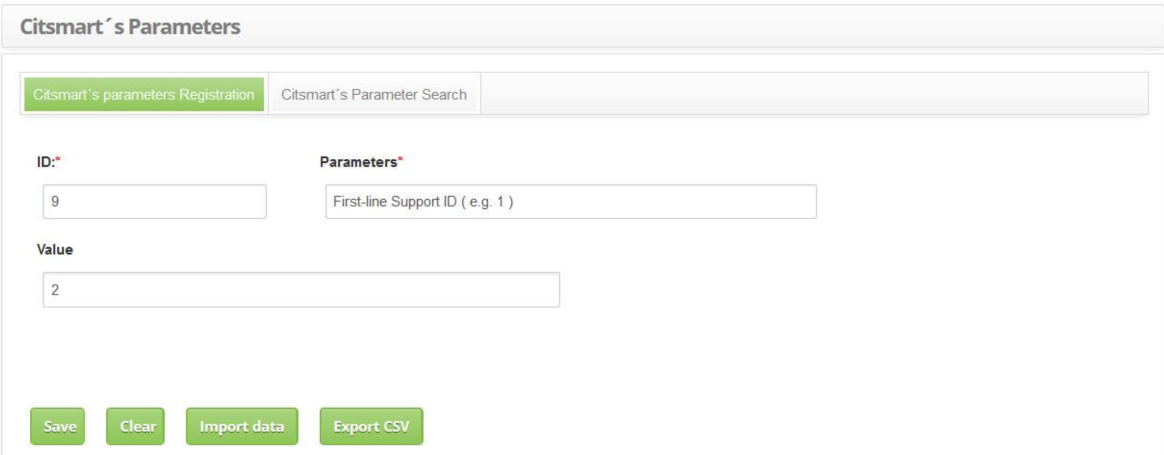


Figure 11 - Configuration of Parameter 9

5. In the **value** field, enter the identification number (ID) of the first-line support and click the Save button to perform the operation. The date, time and the user will be automatically stored for a future audit.

> **NOTE:** When performing the registration of a service request or an incident, and has not been informed the group to attend the service, will be assigned to the group defined in the parameter for first-line support.

6. How to enable satisfaction survey?

The satisfaction survey is the evaluation of a request made through a notification by email. To enable this satisfaction survey, proceed as guidelines below:

1. Create the email template as described in the topic 23.8.1. of the user's guide.
    a. The email template must contain the following keyword: ${LINKPESQUISASATISFACAO}
    b. The figure below illustrates an example of the configuration of email template:

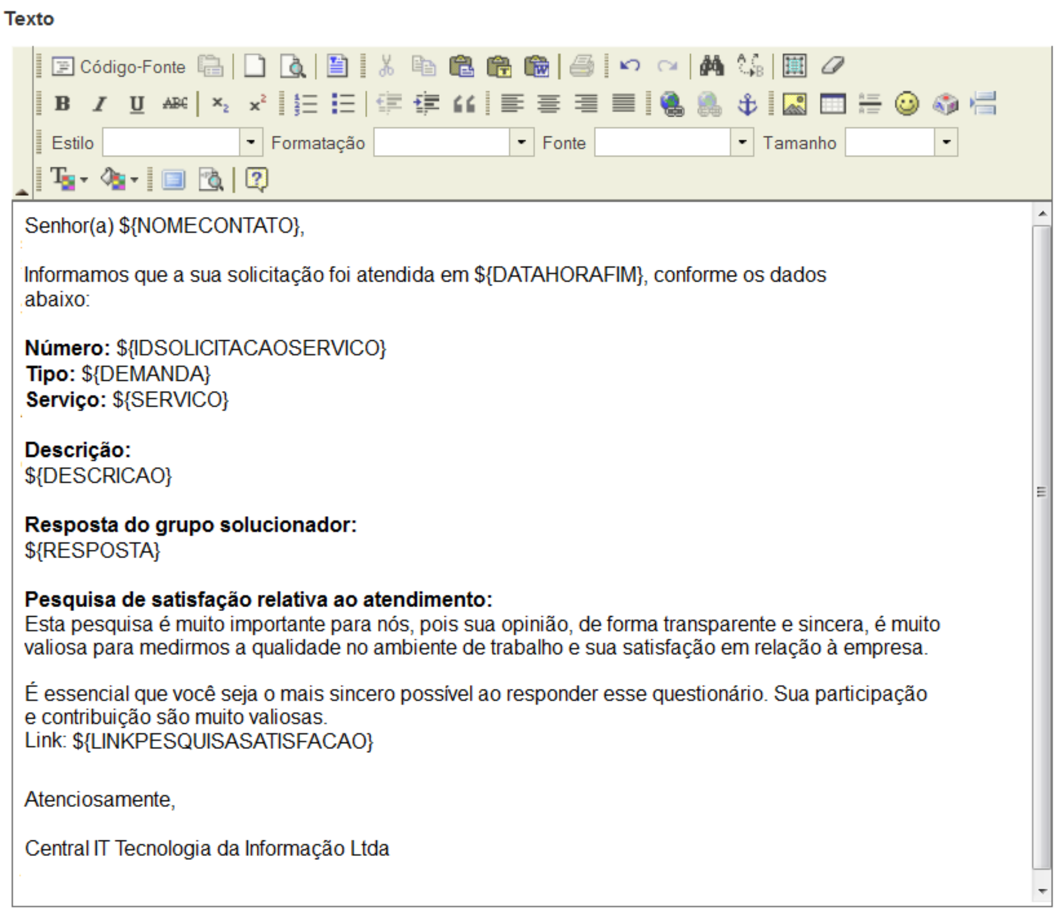


Figure 12 – E-mail Template Configuration

2. To access the functionality of **Citsmart Parameters**, through the main menu navigation (**System** > **Citsmart Parameters**). Will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab, perform the search of the parameter "31 - Send execution e-mail flows of requests / incidents" and select this. After this, will be presented the registration parameter screen with the contents for the selected record, as illustrated in the figure below:

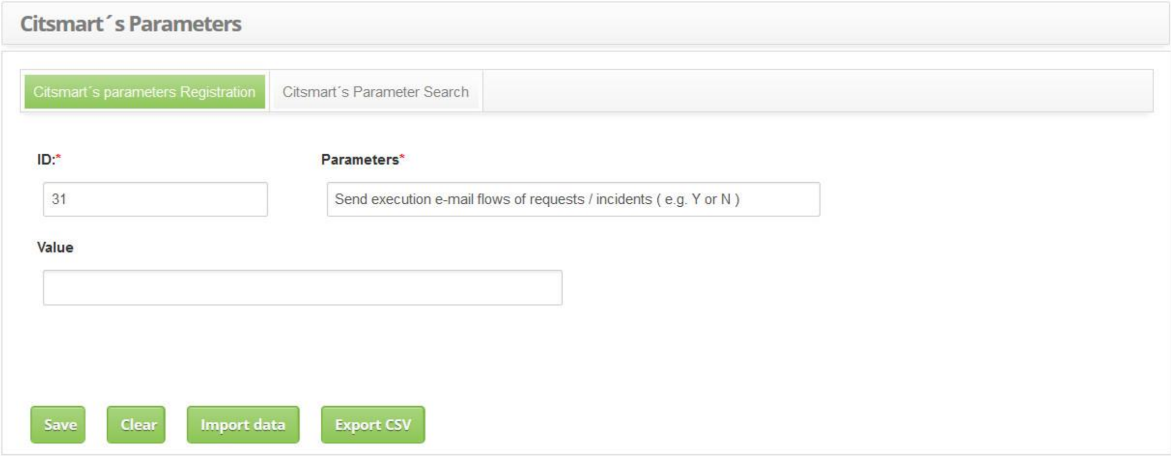


Figure 13 - Configuration of Parameter 31

a. In the **value** field, enter the value "Y" to enable the sending of e-mails regarding service requests. Once this is done, click on the Save button to perform the operation.

3. After configure the parameter, access request services, incident and procedure of the contract related to the business service (**Portfolio Management** > **Service Portfolio** > **Business Service** > **Contract > Services**) and technical service (**Portfolio Management** > **Service Portfolio** > **Business Service** > **Technical/Support Service** > **Contract** > **Services**), and verify if the email template created is informed in the field "E-mail template for Incident / Request (Closure)". Once this is done, when you receive an email notification of a service request that was fulfilled, will display a link to perform the assessment of attendance. By clicking on the link, will open a screen for the evaluation of the service, as illustrated in the figure below:

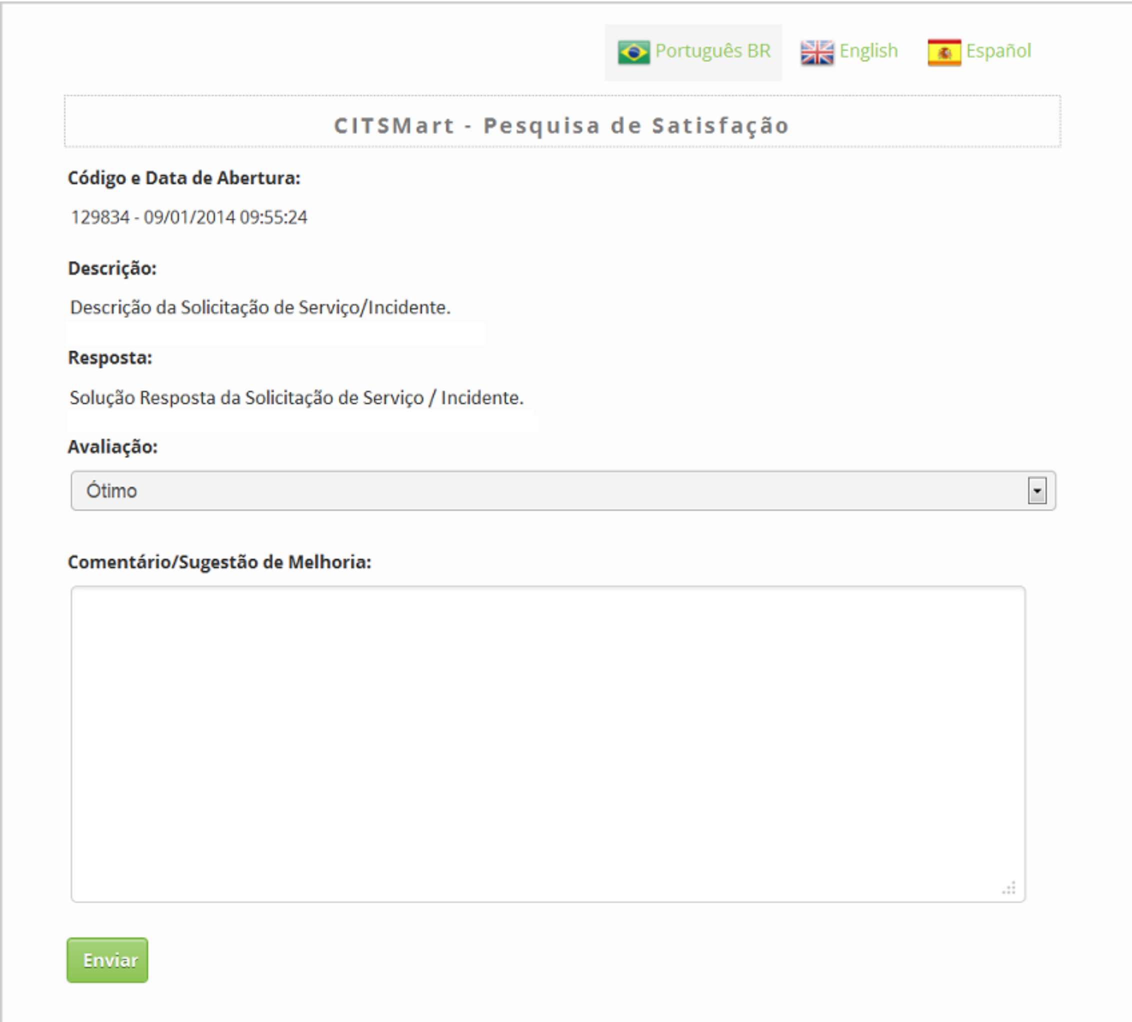


Figure 14 - Satisfaction Survey Screen

7. How do I design the assets which compose my service?

To perform the drawing of assets that make up the service, use the design service map tool, which provides efficient and effective designs for managing service during its life cycle, showing the related configuration items. To accomplish this drawing, proceed according to the guidelines below:

1. To access the functionality of the **Design Service Map** of a Business Service (**Portfolio Management > Service Portfolio > Business Service > Design Service Map**). After this, will be displayed the screen for drawing of the

assets that compose the business service, as illustrated in the figure below:

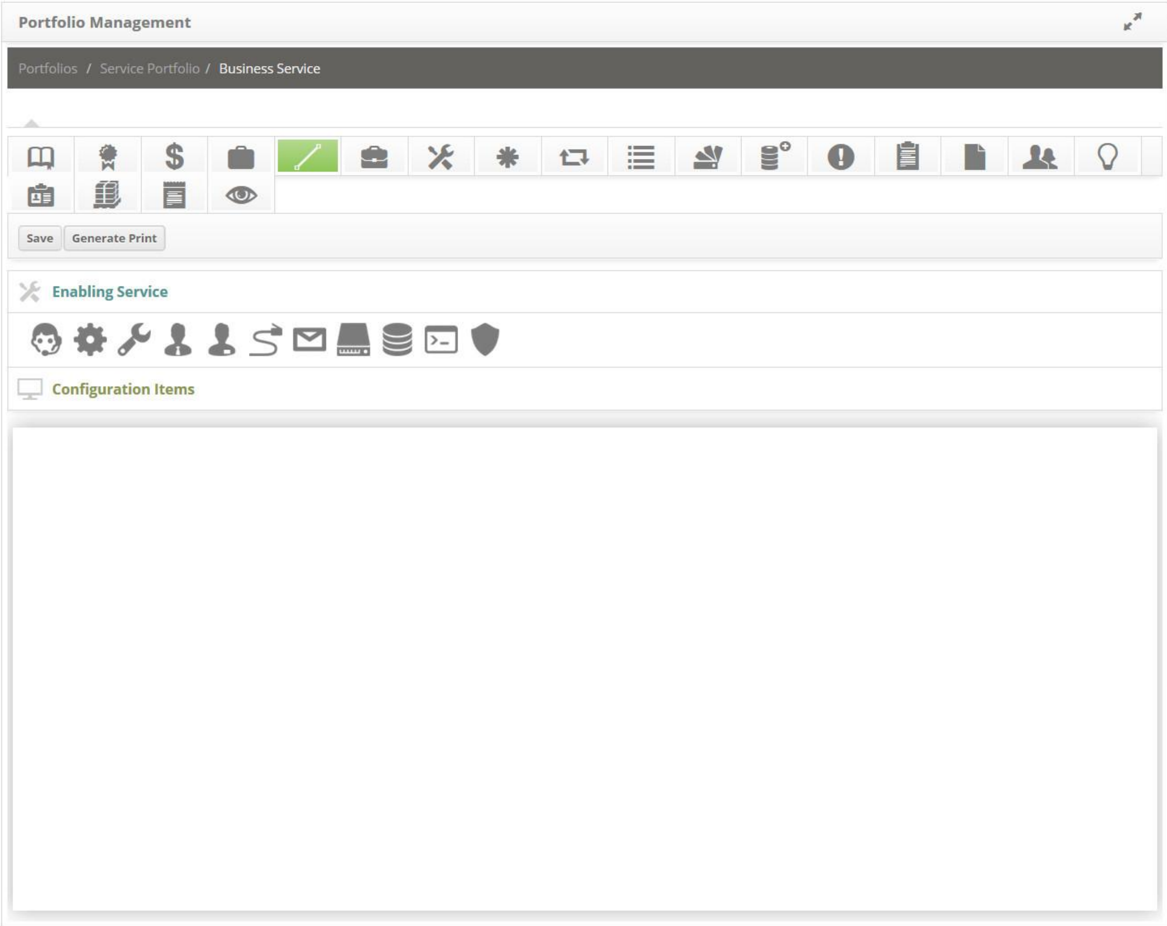


Figure 15 - Design Service Map Screen

a. Perform the drawing as guidance on the topic 6.2.3.8. of user guide.

2. Access the functionality of **Design Service Map** of a service/Technical support service (**Portfolio Management** > **Service Portfolio** > **Business Service** > **Technical/Support service** > **Service Assets**). After this, will be displayed the screen for drawing of the assets that make up the support/technical service, as illustrated in the figure below:

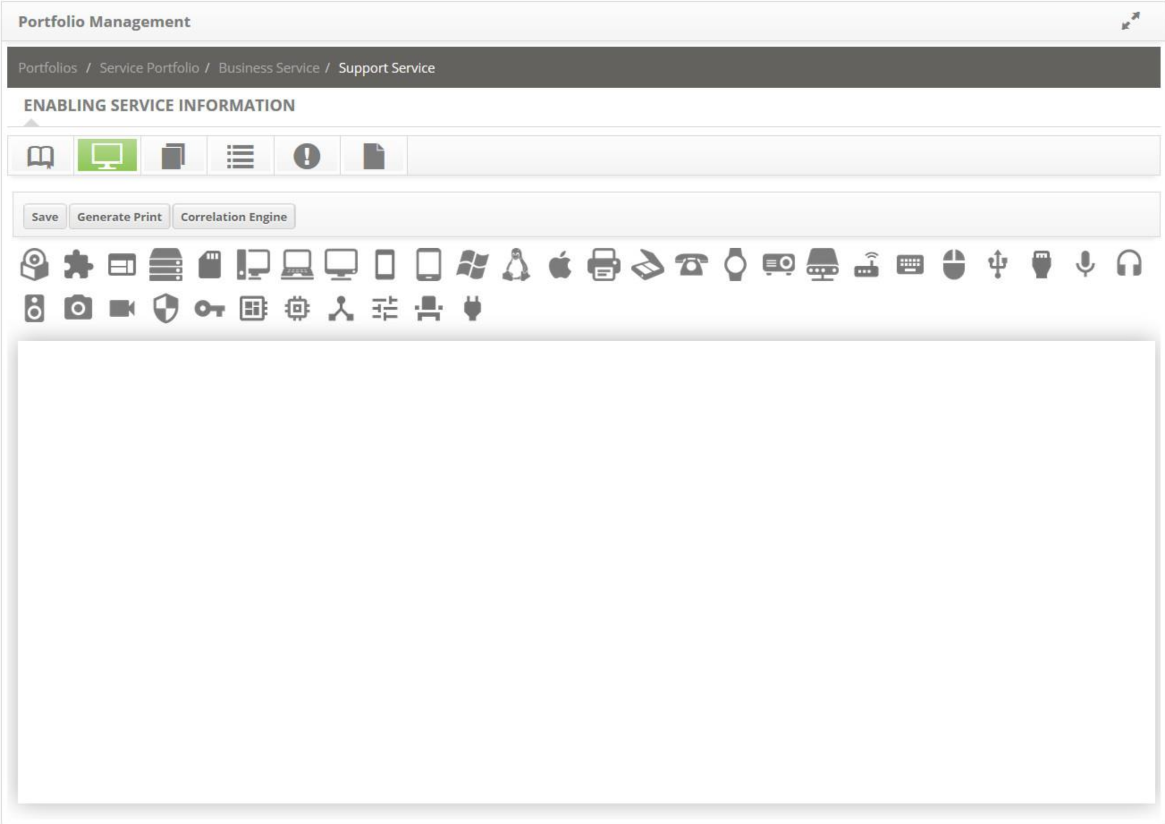


Figure 16 - Screen of drawing the Map of service assets of Technical/Support service

a. Perform the drawing as guidelines contained in the topic 6.2.3.7.1. of the user's guide.

8. How to configure the name of the phases of the life cycle of a CI?

The configuration of the names of the phases of the life cycle of the CI can be performed on the SACM configuration screen and on the Citsmart Parameters screen. To perform this configuration, proceed as guidelines below:

Configuration from the SACM screen

1. Access the functionality of the **SACM Configuration** through main menu navigation (**Processes Management** > **Assets and Configuration management** > **Configuration SACM**). Once this is done, will be displayed the screen of configuration management parameters (attributes) of service

asset and configuration management, as illustrated in the figure below:

Configuration of Service Asset and Configuration Management

Attribute	Value
Notify, in advance, the amount of days left to license expiration	
Send e-mail to configuration item group or owner (1-Group, 2-Owner)	
Verify link between Change and Configuration Item	No
E-mail Model - CI Creation	
E-mail Model - CI Update	
Configuration Item Lifecycle Name - Developing (Ex: Development CIs).	Development
Configuration Item Group ID - Developing. (e.g. : 1)	1
Configuration Item Lifecycle Name - Production (Ex: Production CIs).	Production
Configuration Item Group ID - Production. (e.g. : 2)	2
Configuration Item Lifecycle Name - Homologation (Ex: Homologation CIs).	homologation
Configuration Item Group ID - Homologation. (e.g. : 3)	3
Inventory Name. (Default: Inventory)	Write here
Configuration Item Inventory Group ID. (e.g. : 4)	
Default Group Name- Developing Configuration Item (e.g. : Development - Standard)	Write here
Default Group ID - Developing Configuration Item	
Default Group Name - Homologation Configuration Item (e.g. : Approval - Standard)	Write here
Default Group ID - Homologation Con-figuration Item	
Default Group Name - Production Configuration Item (e.g. : Production - Standard)	Write here
Default Group ID - Production Configuration Item	

Save

Figure 17 - Configuration screen of the parameters of service asset and configuration management

a. Inform the values of the parameters (attributes): Name of group of CIs that are in the development phase - Father (Ex: Development CIs), Name of group of CIs that are in the production phase - Father (Ex: Production CIs) and Name of group of CIs that are in the homologation phase - Father (Ex: Homologation CIs). Once this is done, click on the Save button to perform the operation. The date, time and user will be saved automatically to a future audit.

2. After setting the parameters for the names of the phases of the life cycle of the CI, will be displayed on the screen of **Configuration Items Management** a description of the phases of the CI life cycle, as specified in the parameter value. The figure below illustrates the example:

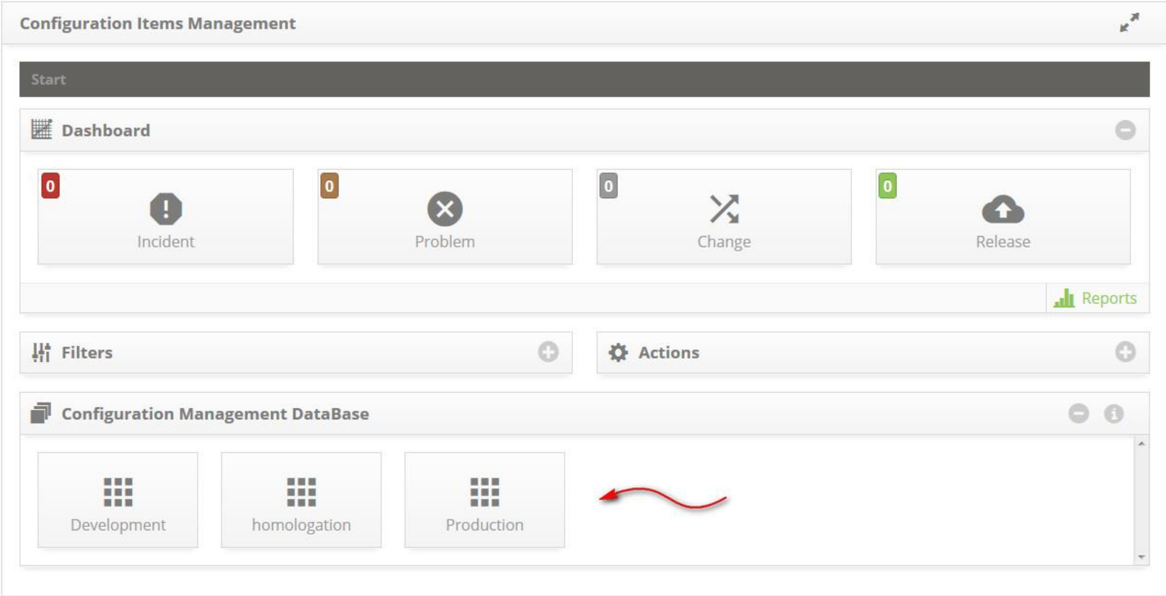


Figure 18 - Description of the CIs groups related with the phases of the CI life cycle

Configuration from the Citsmart Parameters screen

1. Access the functionality of **Citsmart Parameters** via the main menu navigation (**System** > **Citsmart Parameters**). Will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

    a. Perform the search of the parameter "92 - Configuration Item Lifecycle Name - Developing (Ex: Development CIs)" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

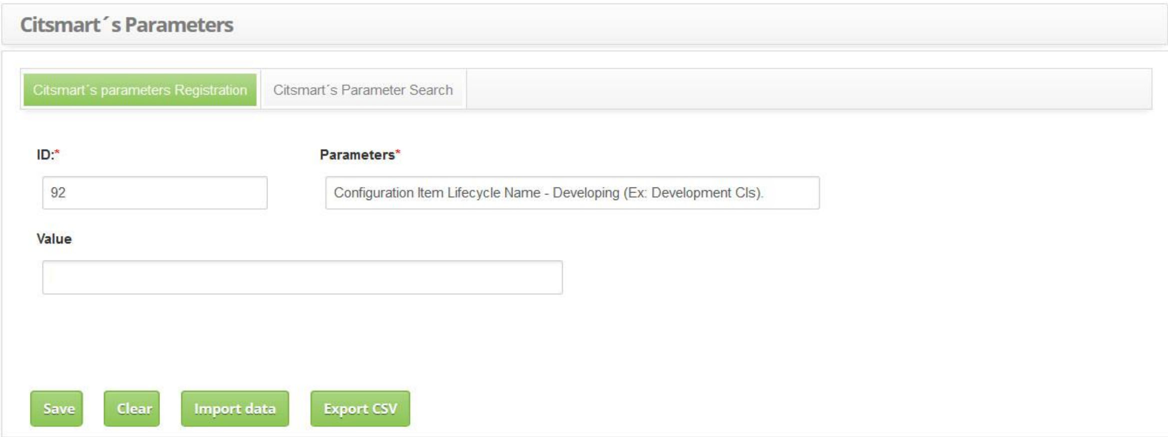


Figure 19 - Configuration of Parameter 92

- In the **value** field, enter the name of the development phase CI group and click the <u>Save</u> button to perform the operation. The date, time and user will be automatically stored for a future audit.

b. Perform the search of the parameter "93 - Configuration Item Lifecycle Name - Production (Ex: Production CIs) " and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below:

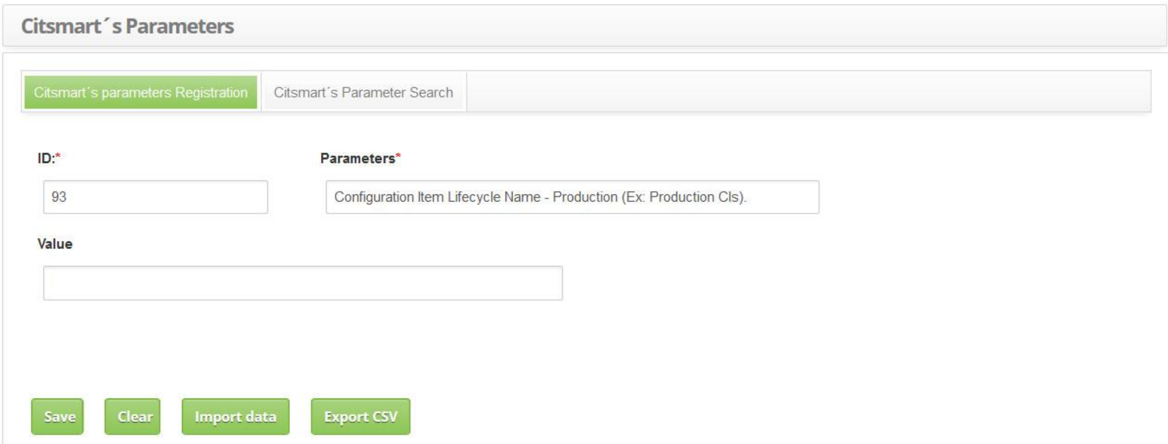


Figure 20 - Configuration of Parameter 93

- In the **value** field, enter the name of the CI group in the production phase and click the <u>Save</u> button to perform the operation. The date, time and the user will be automatically stored for a future audit.

c. Perform the search of the parameter "94 - CIs Configuration Item Lifecycle

Name - Homologation (Ex: Homologation CIs)" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below:

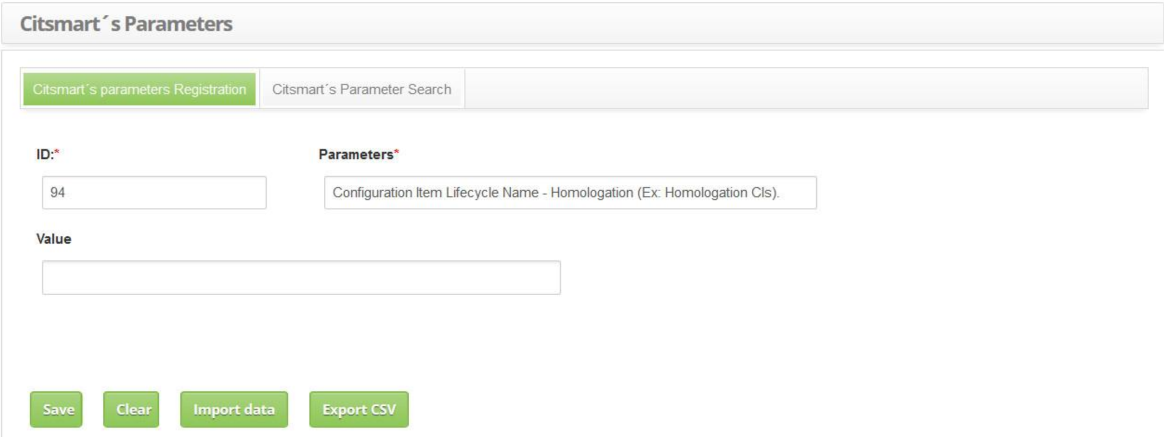


Figure 21 - Configuration of Parameter 94

- In the **value** field, enter the name of the CI group in the homologation phase and click the Save button to perform the operation. The date, time and the user will be automatically stored for a future audit.

2. After setting the parameters for the names of the phases of the life cycle of the CI, will display the descriptions of the stages of the CI life cycle in the configuration items management screen, as specified in the parameter value. The figure below illustrates the example:

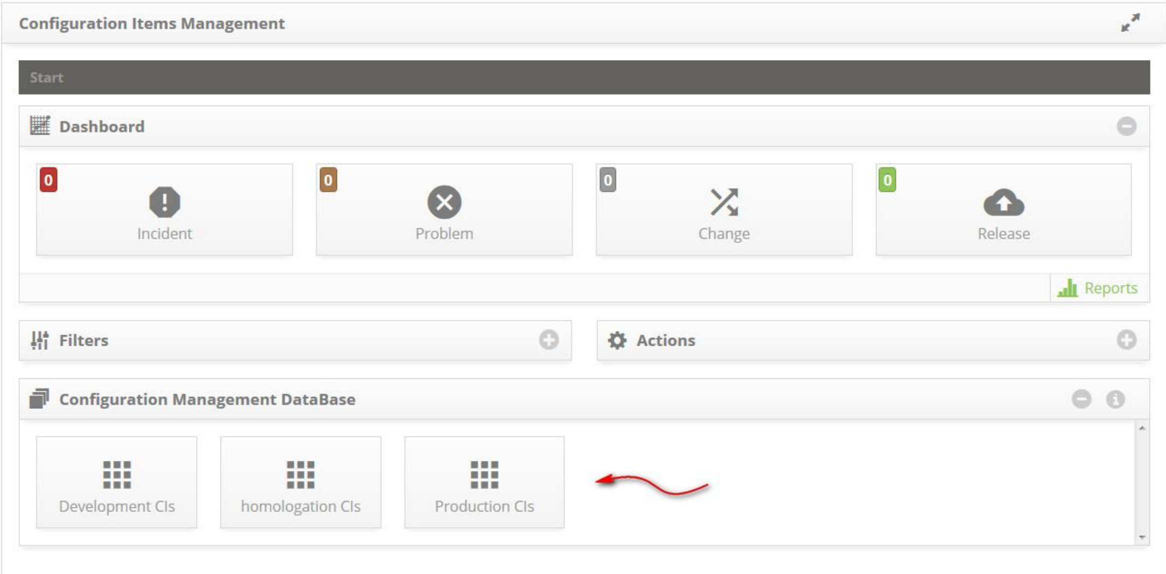


Figure 22 - Description of the CIs related to phases of the CI life cycle

9. To which recipient will be sending CIs notifications?

CIs notifications will be sent to the recipient defined on the Citsmart Parameter screen. To set the recipient, proceed as guidelines below:

1. Access the Citsmart parameters functionality via the main menu navigation (**System** > **Citsmart Parameters**). After that, will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

    a. Perform the search of parameter "90 - Send e-mail to configuration item Notification (1-group, 2-Owner, 3-All) (Default-1)" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

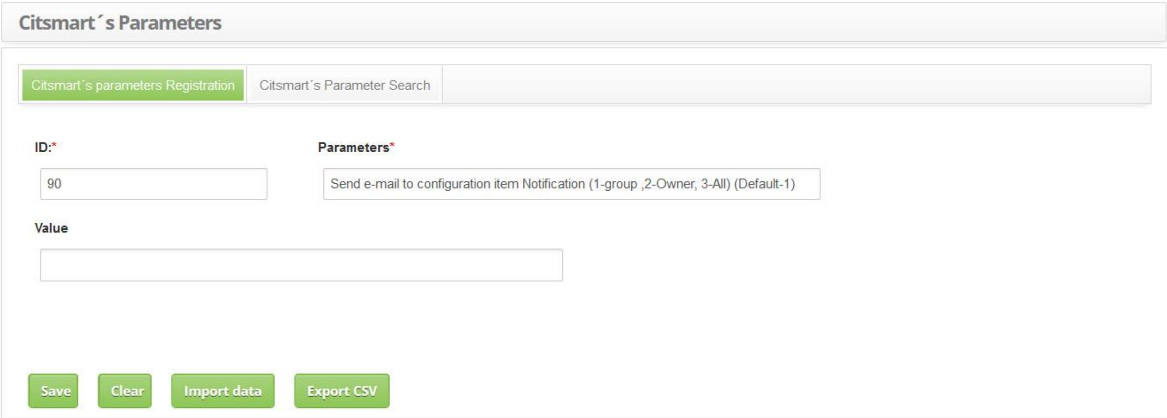


Figure 23 - Configuration of Parameter 90

- In the **Value** field, enter the recipient's identification number (1 - Group, 2 - Owner or 3 - All) and click on the <u>Save</u> button to perform the operation. The date, time and the user will be automatically stored for a future audit.

b. After setting the parameter, will be held the send of emails from CIs notifications to the recipient (group, owner or all), as specified in the parameter value.

10. How to set the mandatory relationship of a change with the CI?

The requirement of the relationship of a change with the CI is set in the Citsmart Parameters. To set this requirement, proceed with these guidelines below:

1. Access the Citsmart parameters functionality via the main menu navigation (**System** > **Citsmart Parameters**). After that, will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

   a. Perform the search of parameter "85 - Verify link between Change and Configuration Item" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

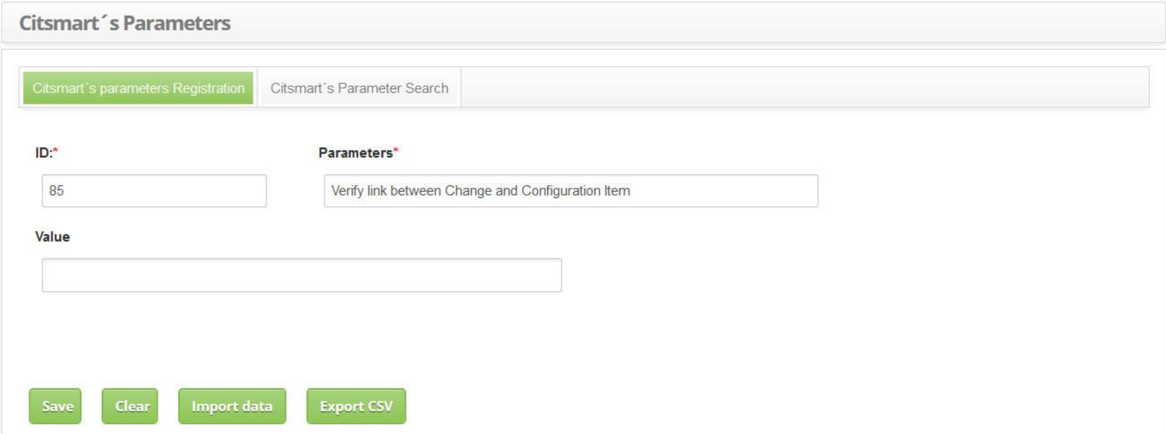


Figure 24 - Configuration of Parameter 85

- In the **Value** field, enter the value "Y" and click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

b. After setting this parameter when a configuration Item is recorded, will be required the link with a change.

11. How to set the directories for storage of artifacts of Knowledge Base?

The directories to store the artifacts of the knowledge base are defined in the Citsmart Parameters. To set these directories, proceed as guidelines below:

1. Access the Citsmart parameters functionality via the main menu navigation (**System** > **Citsmart Parameters**). After that, will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

   a. Perform the search of parameter "147 - Index folder LUCENE for the KNOWLEDGE BASE (e.g. Windows - C:\LUCENE\knowledgebase)" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

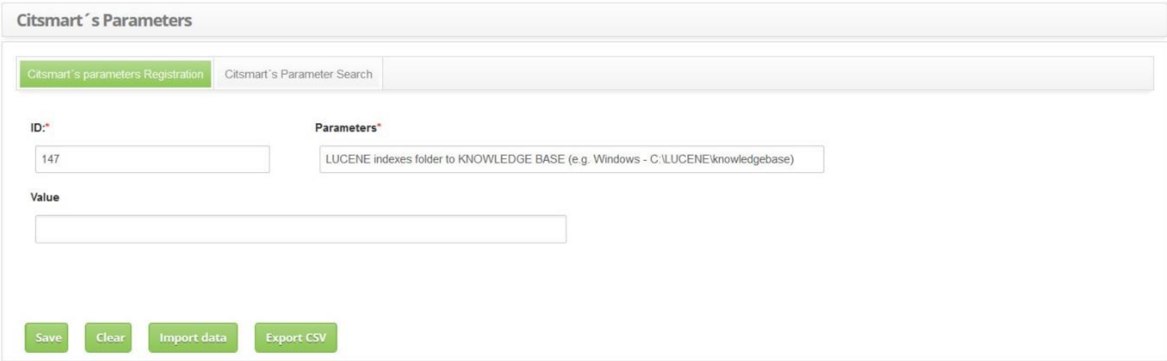


Figure 25 - Configuration of Parameter 147

- In the **value** field, enter the path of the directory in which to store the knowledge base files and click the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.
- After this setting, knowledge base files will be stored in the directory informed in the parameter value.

b. Perform the search of parameter "148 - LUCENE indexes folder to TWIN WORDS" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

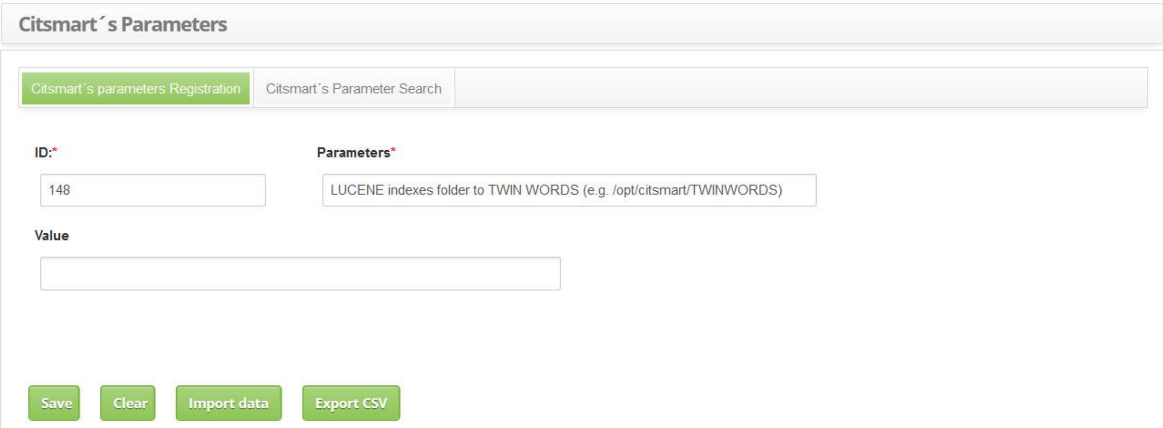


Figure 26 - Configuration of Parameter 148

- In the **value** field, enter the path of the directory in which to store the twin words files and click the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

- After this setting, twin words files will be stored in the directory informed in the parameter value.

c. Perform the search of parameter "149 - LUCENE indexes folder to KNOWLEDGE BASE ATTACHED FILES" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

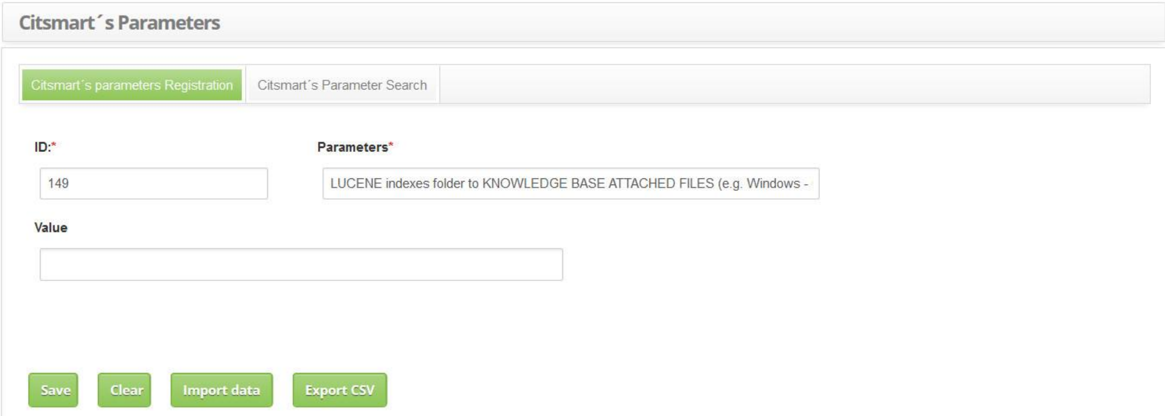


Figure 27 - Configuration of Parameter 149

- In the **value** field, enter the path of the directory in which to store the knowledge base attachments and click the <u>Save</u> button to perform the operation. The date, time and user will be automatically stored for a future audit.

- After this setting, when attaching a document in the knowledge base, it will be stored in the directory informed in the parameter value.

12. How to configure email notifications of service requests?

When register a service request, perform other actions and close this, the requestor will be notified. To perform the sending of this notification, perform the following procedures:

1. Access the contract's services related to the business service (**Portfolio Management** > **Portfolio** > **Business Service** > **Contract** > **Service**) and technical service (**Portfolio Management** > **Portfolio** > **Business Service** > **Technical / Support Service** > **Contract** > **Service**) and notify the email template in the fields: "E-mail template for Incident / Request (Open)", "E-mail template for Incident / Request (Closure)" and "E-mail template for Incident / Request (Other Actions)", as indicated in the figure below:

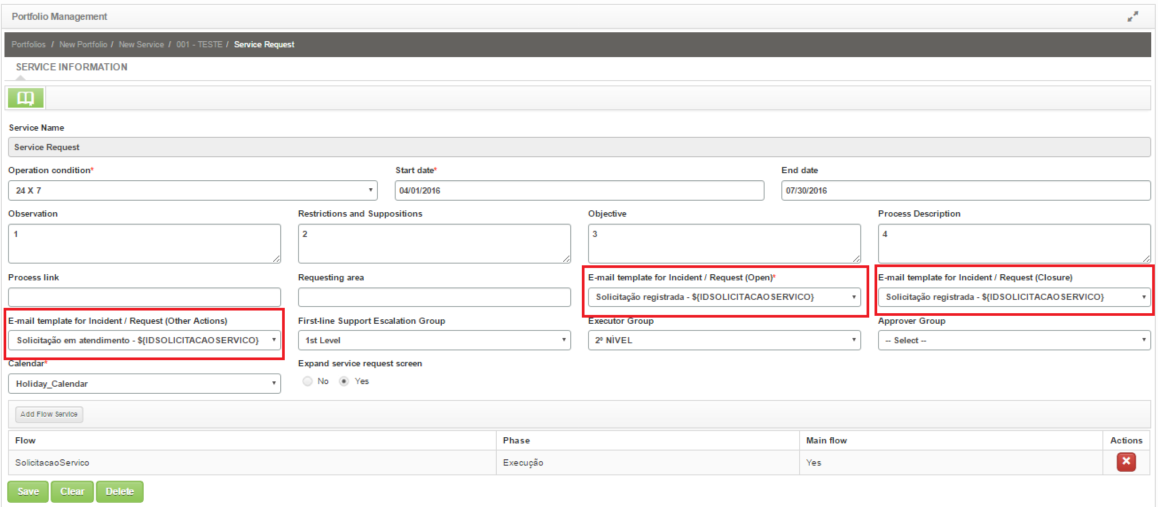


Figure 28 - Service contract registration

If the e-mail templates are not informed, the notifications will not be sent.

Note: *These email templates are defined in the registration of email template (see item 19.8.1. of the user guide).*

2. Access the group registration functionality via the main menu navigation (**General Registration** > **Staff Management** > **Group**). The registration screen will be displayed. If the group is already registered in the system, perform the search and select this (see item 5.9.2. in the user guide). Once

this is done, will be displayed the registration screen of the particular group;

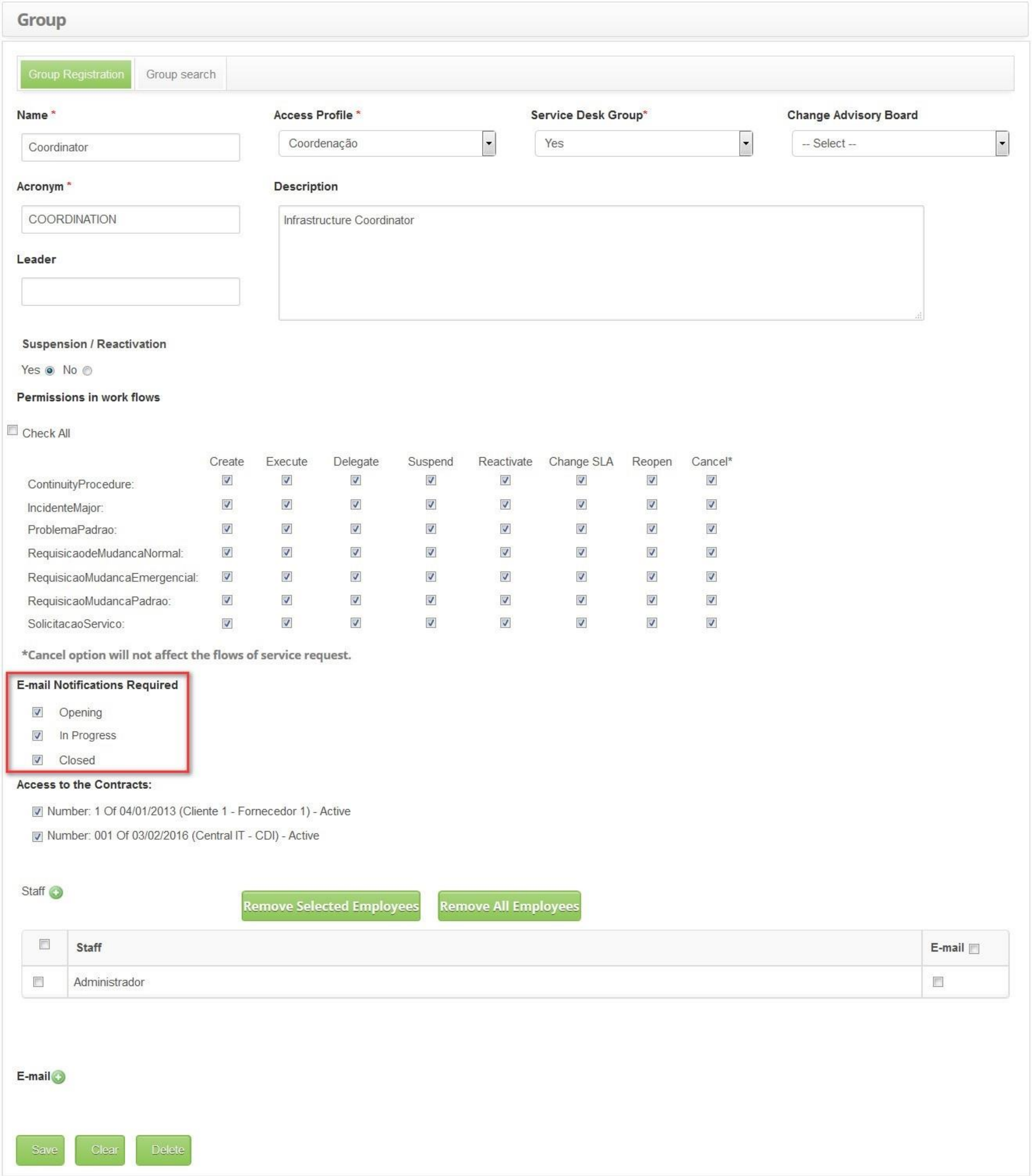


Figure 29 - Group Registration Email Notifications

a. Set if the e-mail notifications (create, follow-up and closure) related to requests, will be required.

***Note**: if it has been defined that notifications are required, when registering a service request, in the incident/request registration screen, these options* *will be selected, not allowing its modification. Otherwise, when registering a service request, these options can be set by the responsible of the incident/request registration.*

3. On screen of **Incident / Request Registration**, when registering an incident/request will be established the rule related to the email notification as defined in the register of the group.

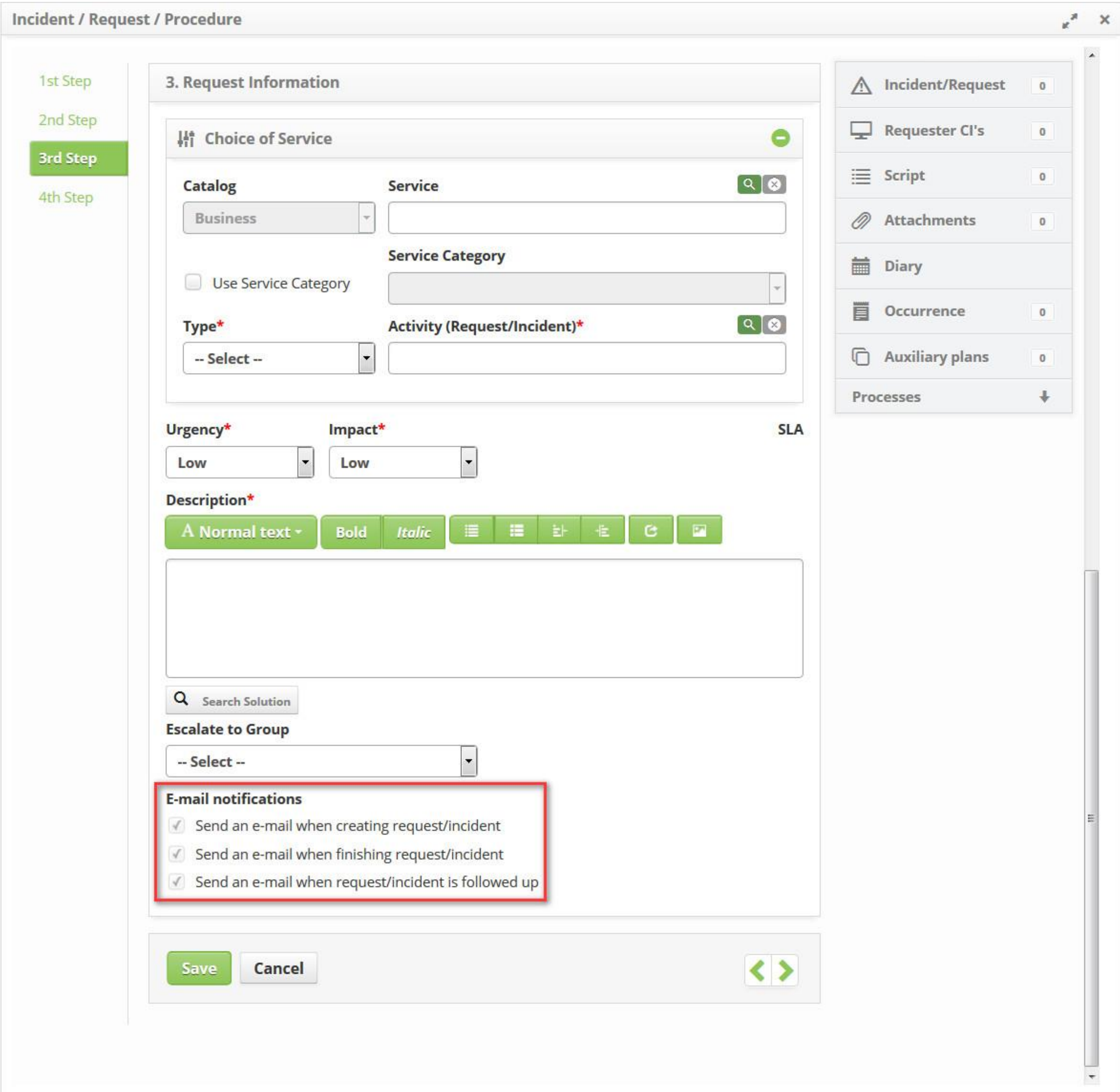


Figure 30 - Incident/Request Registration - Email Notification

NOTE: When you register a service request, the notification will be sent only to the asset group, which is responsible for servicing the request. And when performing the execution of other actions and termination of the service request, the notices will be sentonly to the requestor.

13. What are the key fields that I can use in email template related to a service request?

Below are listed the key fields available for inclusion in the register of email template related to a service request:

Campo Chave	Descrição
${ATRASOSLASTR}	Delay time of SLA. Informs on the delay time of the SLA (Service Level Agreement).
${CONTRATO}	Request contract. Informs the name of the contract of the incident/service request.
${DATAHORAINICIO}	Date and time of the start of request registration. Informs the date and time of the request/incident registration.
${DATAHORAFIM}	The closing date of the request. Informs the closing date of the solicitation/incident.
${DATAHORAINICIOSLASTR}	Date and time of SLA start. Informs the date and time of beginning of the SLA (service level agreement).
${DATAHORALIMITESTR}	Deadline for the attendance of the request. Informs the time limit (date and hour) for the attendance of the request.

${DATAHORASOLICITACAOSTR}	Date and time of the request. Informs the date and time of attendance of the request/incident.
${DEMANDA}	Request type. Informs the type of request (incident or request).
${DESCRICAO}	Request description. Informs the incident/request description.
${DESCRSITUACAO}	Description of the request situation. Informs the description of the request situation.
${DETALHAMENTOCAUSA}	Detailing of incident cause. Informs the detailing of the incident cause.
${EMAILCONTATO}	Requestor's email for contact. Informs the requestor's email address.
${FASEATUAL}	The current phase of the request. Informs the current phase of the request/incident.
${GRUPOATUAL}	Current group of request attendance. Informs the current group, responsible for attendance of the request/incident.
${GRUPONIVEL1}	1st Level Group. Informs the group of 1st level configured for the request attendance.
${IDSOLICITACAOSERVICO}	Number of request. Informs the request/incident number.
${IMPACTO}	Impact of Request/Incident. Informs the impact of the request/incident.
${LINKPESQUISASATISFACAO}	Link to satisfaction survey. Informs the link to perform the assessment of the request/incident.

${NOMECONTATO}	Requestor's name to contact. Informs the requestor's name to contact.
${NOMESERVICO}	Service name. Informs the name of the service requested.
${NOMEUNIDADERESPONSAVEL}	Responsible unit. Informs the unit responsible for the registration of the request / incident.
${NOMEUNIDADESOLICITANTE}	Requesting unit. Informs the requesting unit.
${OBSERVACAO}	Note of requestor contact. Informs the observation described in the request / incident.
${ORIGEM}	Origin of the request. Informs the origin of the request/incident.
${PRIORIDADE}	Priority of the request. Reports on the priority of the service request / incident.
${RESPONSAVEL}	Responsible for registering the request. Informs the responsible for the service request register / incident.
${RESPOSTA}	Description of the request closure. Reports on the description of the service request closure / incident.
${SERVICO}	Requested Service. Informs the name of the requested service.
${SITUACAO}	Situation of the request. Informs the current situation of the request/incident.
${SLAACOMBINAR}	Sla "To combine".

	Reports whether the SLA was defined as "to combine".
${SOLICITANTE}	Requestor's name. Informs the name of the requestor.
${SOLICITANTEUNIDADE}	Requestor's name and unit. Informs the requestor's name and the unit on which it is allocated.
${TELEFONECONTATO}	Requestor's phone to contact. Informs the requestor's telephone number to contact.
${URGENCIA}	Urgency of the request. Informs the urgency of the request/incident.

Use of Key Fields

The following are shown examples of use of key fields available for inclusion in the register of email template of a service request.

Example of inclusion of the key fields in the email template

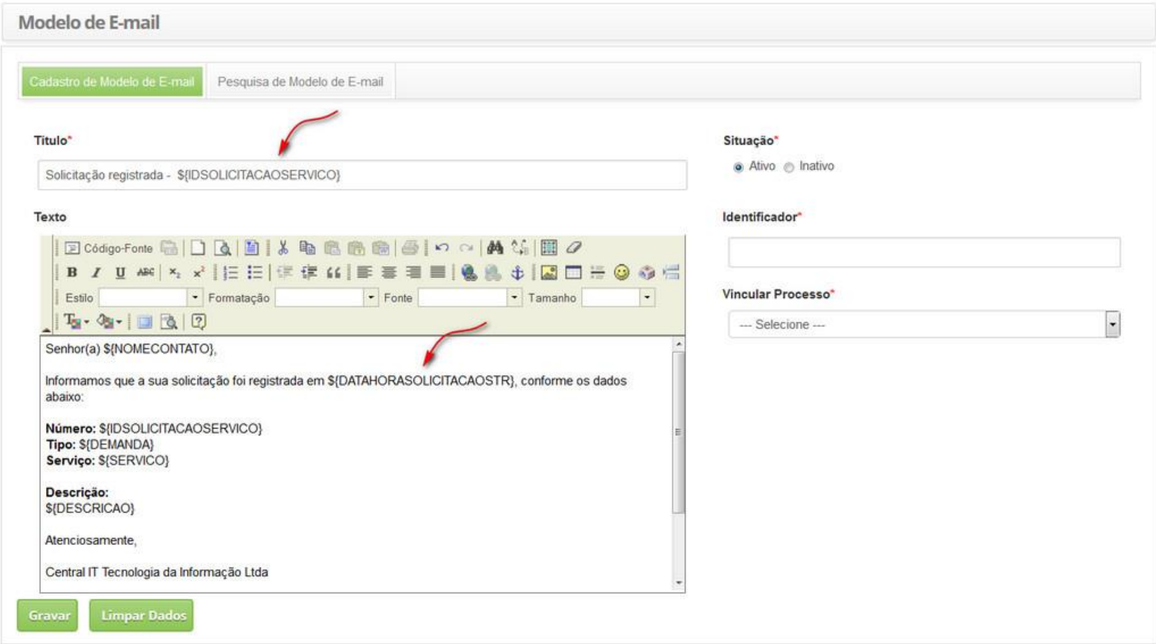
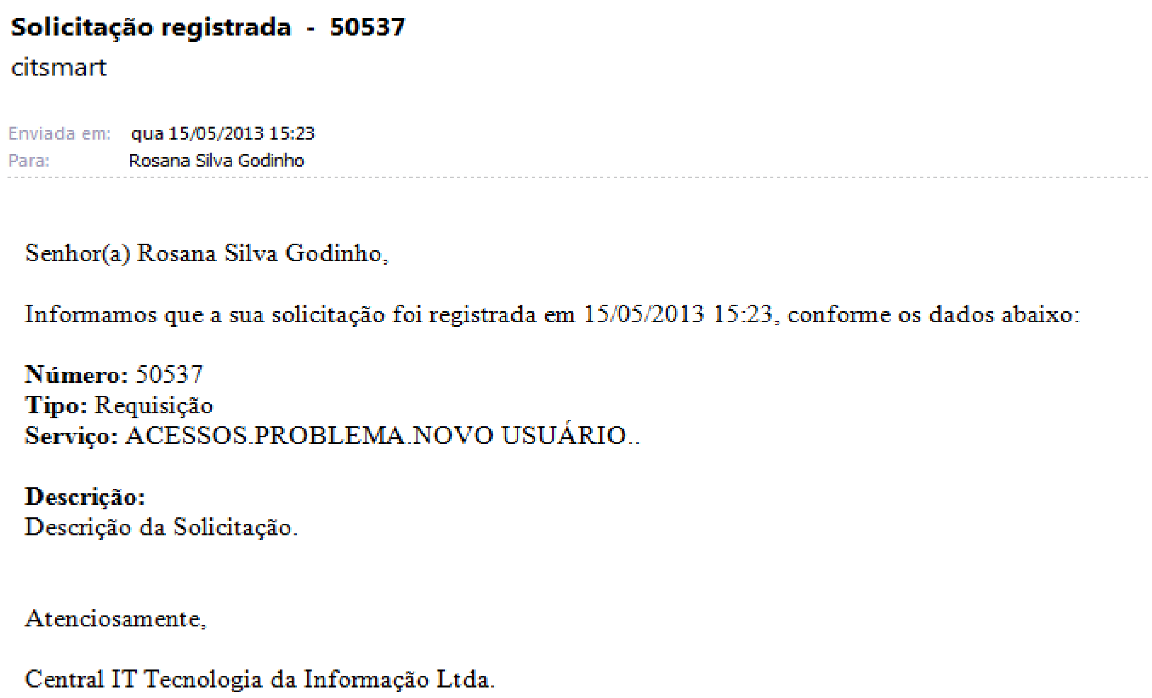


Figure 31 – E-mail Template Record

Example of the result of sending the email template



Solicitação registrada - 50537

citsmart

Enviada em: qua 15/05/2013 15:23

Para: Rosana Silva Godinho

Senhor(a) Rosana Silva Godinho,

Informamos que a sua solicitação foi registrada em 15/05/2013 15:23, conforme os dados abaixo:

Número: 50537
Tipo: Requisição
Serviço: ACESSOS.PROBLEMA.NOVO USUÁRIO..

Descrição:
Descrição da Solicitação.

Atenciosamente,

Central IT Tecnologia da Informação Ltda.

Figure 32 – Email Notification

Examples of key fields displayed in the email

ATRASOSLASTR: 00:00

CONTRATO: 001 - CENTRAL IT

DATAHORAINICIO: 15/05/2013 15:23

DATAHORAFIM: 16/05/2013 08:00

DATAHORAINICIOSLASTR: 15/05/2013 15:23:22

DATAHORALIMITESTR: 16/05/2013 08:53

DATAHORASOLICITACAOSTR: 15/05/2013 15:23

DEMANDA: Requisição

DESCRICAO: Descrição da Solicitação.

DESCRSITUACAO: Em andamento

DETALHAMENTOCAUSA: Detalhamento da Causa

EMAILCONTATO: rosana.godinho@centralit.com.br

FASEATUAL: Execução

GRUPOATUAL: TestesGoiania

GRUPONIVEL1: CIT - 1ºNÍVEL

IDSOLICITACAOSERVICO: 50537

IMPACTO: M

LINKPESQUISASATISFACAO: Clique aqui para fazer a avaliação do Atendimento

NOMECONTATO: Rosana Silva Godinho

NOMEUNIDADERESPONSAVEL - CentralIT Goiânia

NOMEUNIDADESOLICITANTE - CentralIT Goiânia

OBSERVACAO - Observação de informações de Contato do Solicitante

ORIGEM - Help Desk - Telefone

PRIORIDADE - 3

RESPONSAVEL - Rosana Silva Godinho (CentralIT Goiânia)

RESPOSTA - Fechamento da Solicitação

SERVICO - ACESSOS.PROBLEMA.NOVO USUÁRIO...

SITUACAO: EmAndamento

SLAACOMBINAR: N

SOLICITANTE: Rosana Silva Godinho

SOLICITANTEUNIDADE: Rosana Silva Godinho (CentralIT Goiânia)

TELEFONECONTATO: Não disponível

URGENCIA: M

14. What is the file size limit for upload on the screens of Citsmart's ITSM annex?

The upload of the attachments specifies the size limit of 15 Mbytes for each uploaded file in the system. However, on the screen of the Citsmart ITSM Portal, continues with the limit of 5 Mbytes for the file size.

15. How to enable the escalation rule of a service request?

The escalation rule of a service request is enabled in the Citsmart Parameter screen. To enable this rule, proceed as guidelines below:

1. Access the functionality of Citsmart parameters via the main menu navigation (**System** > **Citsmart Parameters**). After that, will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

    a. Perform the search of parameter "190 - Enable Escalation Rules" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

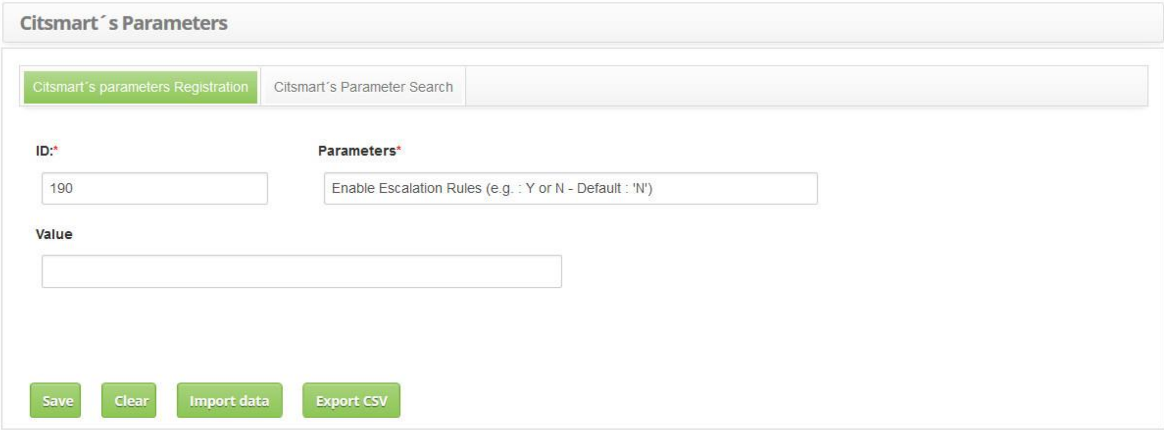


Figure 33 - Configuration of Parameter 190

b. In the **value** field, enter the value "Y" to enable service request escalation and click the <u>Save</u> button to perform the operation, The date, time and user will be stored automatically for future auditing.

16. How to enable the problem escalation rule?

The problem escalation rule is enabled in the Citsmart Parameter. To enable this rule, proceed as guidelines below:

1. Access the functionality of Citsmart Parameters via the main menu navigation (**System** > **Citsmart Parameters**). After that, will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

   a. Perform the search of parameter "194 - Enable Problem Escalation Rules" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

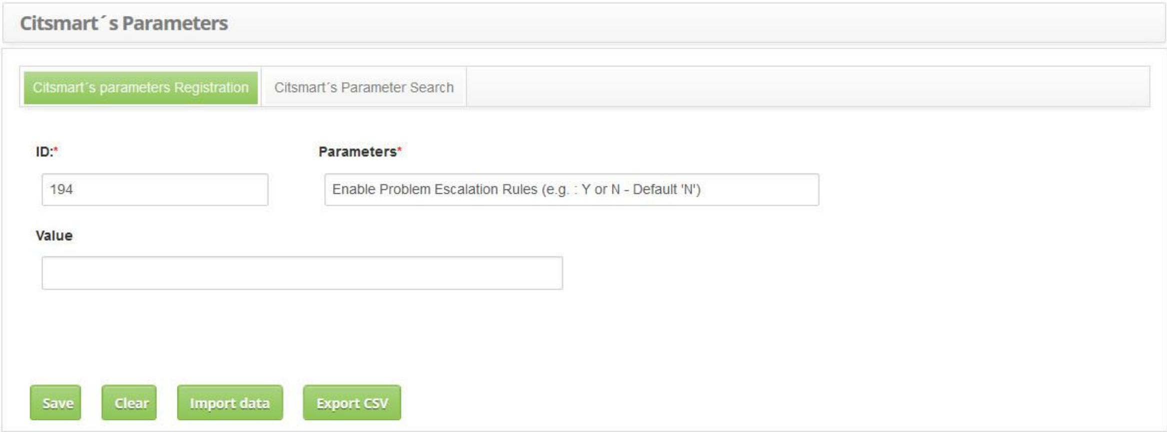


Figure 34 - Configuration of Parameter 194

b. In the **value** field, enter the value "Y" to enable the problem escalation and click the Save button to perform the operation, The date, time and user will be stored automatically for future auditing.

17. How to enable the change escalation rule?

The rule change escalation is enabled in the Citsmart Parameter. To enable this rule, proceed as guidelines below:

1. Access the functionality of Citsmart Parameters via the main menu navigation (**System** > **Citsmart Parameters**). After that, will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

   a. Perform the search of parameter "193 - Enable Change Escalation Rules" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

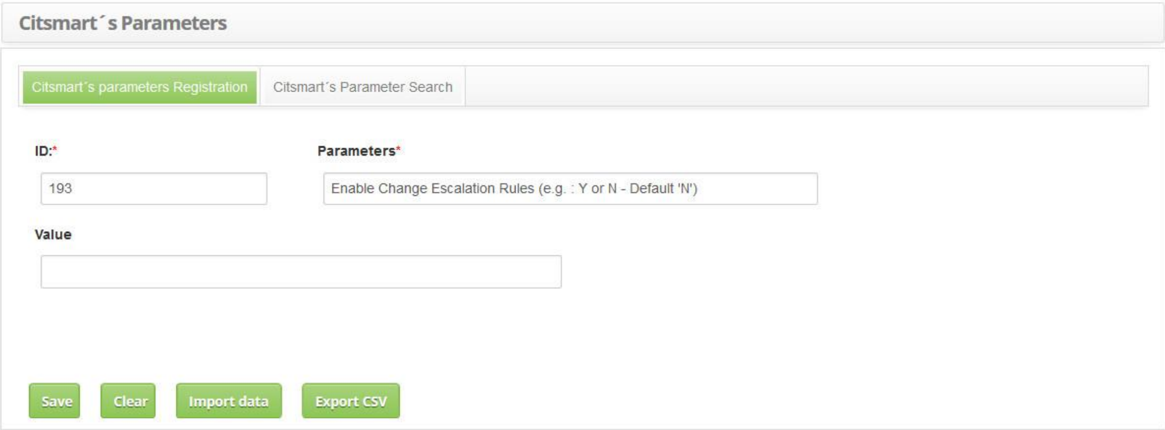


Figure 35 - Configuration of Parameter 193

b. In the **value** field, enter the value "Y" to enable the problem escalation and click the Save button to perform the operation, The date, time and user will be stored automatically for future auditing.

18. How to enable automatic e-mail reading routine?

When send an email to Citsmart support, will be held the automatic reading of the email. If the email is related to a request, it will be checked if the email contains the word ' Request ' and the number of the request, if contains, is stored the email as occurrence on request.

For this routine of reading emails work perfectly, it is necessary to perform the following procedures:

1. Install the version of java 7. If the version is lower than, the routine will not work;

2. Configure the required parameters. Access the functionality of Citsmart Parameters via the main menu navigation (**System** > **Citsmart Parameters**). After that, will be presented the **Citsmart Parameters** screen, click the **Citsmart Parameters Search** tab. Once this is done, will be presenting the screen to search for parameters;

   a. Perform the search of parameter "23 - READING SMTP - Service Desk

Incoming Mail Server" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

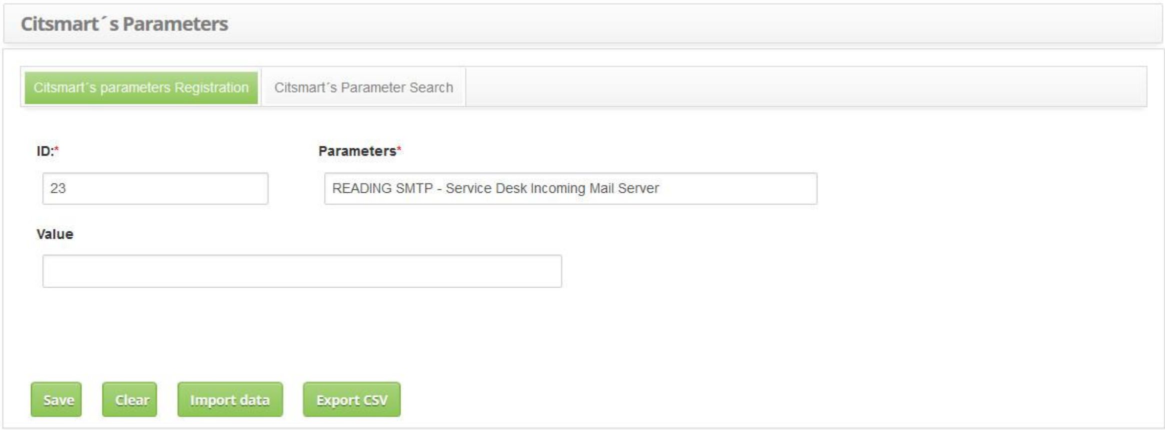


Figure 36 - Configuration of Parameter 23

- In the **value** field, enter the incoming email server (e.g. orion.egrupo.com.br) and click on the <u>Save</u> button to perform the operation. The date, time and user will be automatically stored for a future audit.

b. Perform the search of parameter "24 - READING SMTP - Service Desk Inbox Mail" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

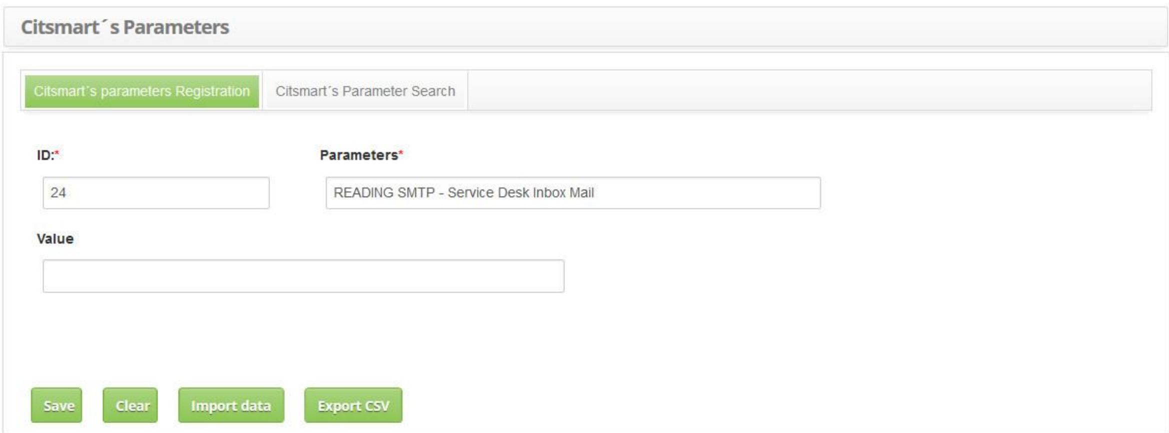


Figure 37 - Configuration of Parameter 24

- In the **value** field, enter the email or the email account login (e.g.: support. citsmart) and click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

c. Perform the search of parameter "25 - READING SMTP - Service Desk Inbox Mail Password" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

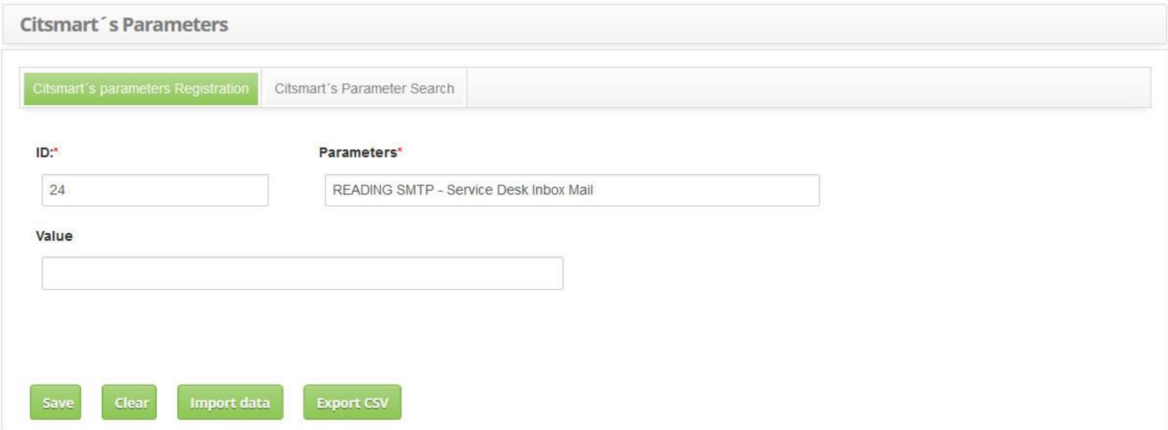


Figure 38 - Configuration of Parameter 25

- In the **value** field, enter the password of the email account and click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

d. Perform the search of parameter "26 - READING SMTP - Service Desk Mail Provider (imaps, pops, etc)" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

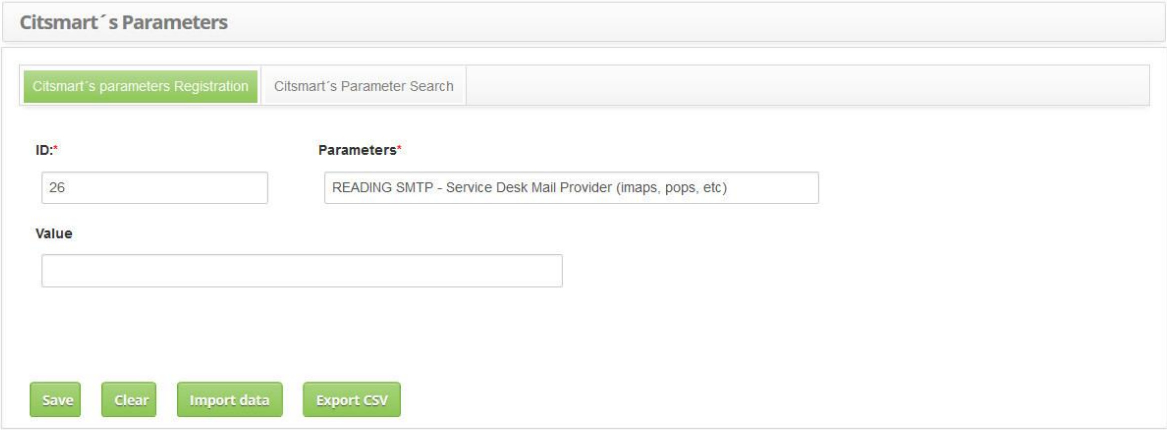


Figure 39 - Configuration of Parameter 26

- In the **value** field, enter the protocol that will be used for reading e-mails (e.g. imap or pop) and click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

e. Perform the search of parameter "27 - READING SMTP - Service Desk Server Port Number" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

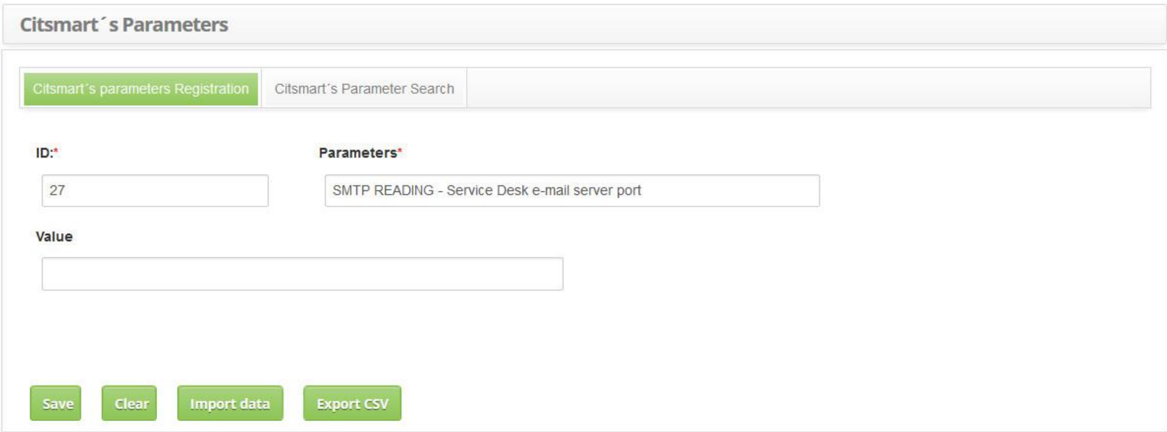


Figure 40 - Configuration of Parameter 27

- In the **value** field, enter the port that will be used to access the e-mail server (587 to pop server or 995 to imap server) and click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

f. Perform the search of parameter "28 - READING SMTP - Service Desk Inbox Mail Folder" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

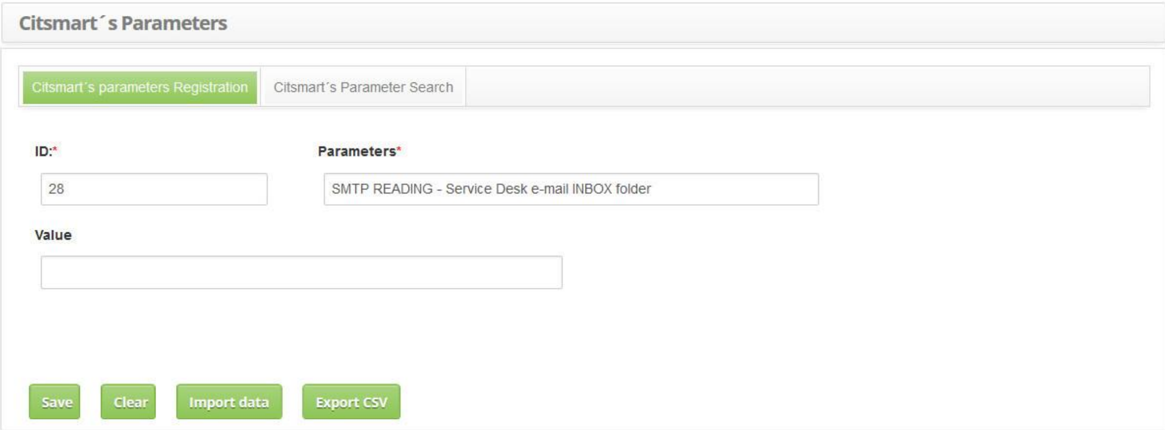


Figure 41 - Configuration of Parameter 28

- In the **value** field, enter the Inbox folder of the email account and click on the <u>Save</u> button to perform the operation. The date, time and user will be automatically stored for a future audit.

g. Perform the search of parameter "200 - Enable Reading New E-mails Routine" and select this. After this, will be presented the parameter registration screen with the contents of the selected record, as illustrated in the figure below.

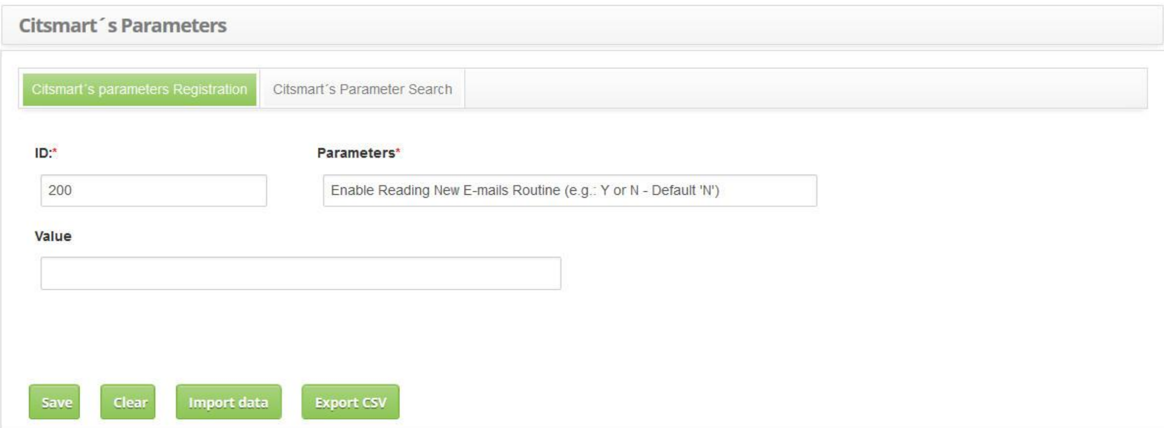


Figure 42 - Configuration of Parameter 200

- In the **value** field, enter the value "Y" to activate the routine of email automatic read and click on the Save button to perform the operation. The date, time and user will be automatically stored for a future audit.

Note: *after performing the procedures described above, the automatic routine of reading emails will work perfectly.*

19. How to improve performance in the ITSM Citsmart?

The performance of the system is defined as the time that the software it takes to perform a certain task, given that this performance is a strong attribute of quality perceived by users of the software.

To improve its performance, the ITSM Citsmart has the ability to work with more than one instance. To do this, must use the configuration file (citsmart.cfg), where it is possible to activate or inactivate routines.

To use this functionality, you must have the citsmart.cfg file in the directory:

- ✓ \jboss\standalone\configuration\ (When Jboss is used as a single instance);
- ✓ \jboss\domain\configuration\ (When uses cluster, have domains and hosts).

It must be with the configured content according to your needs. Below follows the guidelines needed to perform the configuration:

Note: *Where is $ {value} replace by the corresponding values.*

START_MODE_RULES=${valor} *(This parameter defines if processes the escalation rules. Inform the value TRUE to activate or FALSE to disable.).*

START_MODE_ITSM=${valor} *(This parameter defines whether the interface of ITSM is presented. Notify the value TRUE or FALSE. If set to the value FALSE, will not allow open the features of incidents, etc).*

START_MONITORING_ASSETS=${valor} *(This parameter defines if asset monitoring will be activated. Inform value TRUE to activate or FALSE to disable).*

QUANTIDADE_BACKUPLOGDADOS=${valor} *(This parameter sets the amount of items in the logdados table that will be backed up. Enter the amount of items, e.g. 1000).*

When the parameters below are not enabled, the system will raise with the threads to improve your performance. It is necessary that these parameters are configured before the Jboss startup for the operation of this.

START_MONITORA_INCIDENTES=${valor} *(This parameter defines if disables the monitoring of incidents. Inform value TRUE to enable or FALSE to disable).*

START_VERIFICA_EVENTOS=${valor} *(This parameter defines if disables checking for events. Inform value TRUE to activate or FALSE to disable).*

The use of the parameters below is optional. These perform the main connection pool separation with the workflow execution pool, inventory and reports.

JDBC_ALIAS_BPM=java:/jdbc/${valor} *(Este parâmetro define o nome do datasource do inventário. Informe o nome do datasource, ex.: java:/jdbc/citsmart_inventory).*

JDBC_ALIAS_INVENTORY= java:/jdbc/${valor} *(This parameter sets the name of the datasource of the inventory. Enter the name of the datasource, e.g. java:/jdbc/citsmart_inventory).*

JDBC_ALIAS_REPORTS= java:/jdbc/${valor} *(This parameter sets the name of the datasource of the reports. Enter the name of the datasource, e.g. java: / jdbc/citsmart_reports).*

The parameter below separates the BPM event routine processing on a separate thread pool of the main thread pool of system, to relieve the resource usage of the database and the server.

JDBC_ALIAS_BPM_EVENTOS=java:/jdbc/${valor} *(This parameter sets the name of the datasource BPM event. Enter the name of the datasource, e.g. java:/jdbc/citsmartBpmEventos).*