

alemba  
SERVICE MANAGER



ASM Core v10.1  
Release Notes  
Version 1.0



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## About this guide

These release notes contain instruction and information on the features and upgrades that are incorporated in the current release of Alemba Service Manager™. ASM Core was previously known as vFire Core.

## Intended Audience

This guide is written for the analysts and system administrators responsible for the upgrade and maintenance of Alemba Service Manager™.





## Copyright

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## Standards and Conventions

The following standards and conventions are used throughout the document:

	Prerequisites, including security rights and access you may need prior to completing the task. Prerequisites are also highlighted in a shaded box.
	Information related to the current topic that may be of particular interest/significance. Notes are also highlighted in a shaded box.
	Warnings. These are also highlighted in a shaded box.
	Examples. These are also highlighted in a shaded box.
<b>Field name</b>	Fields are highlighted in bold text.



## Version Details

The table below contains version details for this document.

Version No.	Date	Details
1.0	23 Dec 2019	New features and changes for ASM v10.1 release.



## Introducing ASM v10.1

This release contains new feature functionality for:

- ASM Core
- Self Service Portal
- Nano

## Installation

For installation instructions, please see the following publication:

- [ASM v10.1 Prerequisites and Installation Guide](#)

## Replicated Databases

If you replicate the database, you must apply any database schema changes and new indexes to all databases.

## Major and minor release conventions

Alemba® uses the following conventions for each release:

- Major release: denoted by a two-digit number, for example 10.3  
These contain feature changes and bug fixes
- Minor release: denoted by a three-digit number, for example 10.3.5  
These contain maintenance fixes to the major release

Release Notes are created for each major release, and the document is subsequently updated with the minor release changes.



# New Features and Changes in Alemba Service Manager™ v10.1

New features and improvements are being introduced all the time to make your system better, faster and easier to use.

**Dashboards** We have introduced a new dashboard platform. For more information, see [page 10](#).

- **Installation** You install dashboards separately from Alemba Service Manager™. For more information about dashboard prerequisites and installation, see the ASM v10.1 Prerequisites and Installation Guide.
- **Configuration** The dashboard platform consists of a Dashboard Server, User Management Server and separate dashboard database. You must configure each of these and ASM in order to work with dashboards. For more information, see the ASM v10.1 **Prerequisites and Installation Guide**.
- **Using dashboards in Alemba Service Manager™** You can create dashboards using a web designer or desktop application (Alemba Dashboard Designer). After you have created them, you can configure the dashboard menus for ASM Core, Nano and Self Service Portal. For information about creating and using dashboards, see [page 12](#).

**Close and Reopen Calls** Users in the Self Service Portal can close and reopen their own calls. Administrators define parameters for the Close and Reopen actions and enable these permission in Users' Self Service Portal Roles. For more information, see [page 20](#).

**Knowledge Import** Grow your Knowledge Base and improve your content by importing documents as knowledge articles. The knowledge articles retain formatting from the document, and can be found by a text search as normal. You can import MS Word, MS Excel, and PDF documents To learn more, see [page 24](#).

**Search Fields** We have enhanced Search Fields in Self Service Portal to be more intuitive by displaying a text prompt and scroll bar. The search button, which opens Advanced Search, is now hidden until text is entered in the field. To learn more, see [page 26](#).

**Password Policy** ASM has a new password policy. From v10.1, new and changing passwords require a minimum length of six characters.

**EWS Support** Exchange Web Services (EWS) is now supported for Incoming and Outgoing email. For more information, see [page 37](#).

**TLS 1.2** We support TLS 1.2 for emails and connectors.

**Preview Features** Preview Features is a new section in System Administration providing early access to upcoming new features. To learn more, see [page 27](#)

ASM v10.1 provides early access to:

- **Multi-language** The Self Service Portal supports multiple languages. Users can select their preferred language at any time in the Self Service Portal, as long as the Administrator has installed the relevant language packs. For more information, see [page 27](#).



- **Global Search** We have added a global search bar to the Self Service Portal, enabling Users find what they need more quickly and easily. The global search bar searches across Knowledge, the Service Request Catalog, calls, and requests. To learn more, see [page 29](#).
- **Call Activities** Create activity items for calls, much like an activity checklist. Analysts can close activity items as they complete them, which ensures the correct process is followed, and enables tracking of call progress. Administrators can create and reuse lists across multiple calls and call templates. For more information see [page 30](#).
- **Quick Forms** Administrators can create lists of questions that appear on Call Details in ASM Core, helping Analysts to ask the right questions and capture all pertinent information. Quick Forms are linked to Types Tiers and appear in the Calls with the selected Type. For more information, see [page 33](#).
- **Nano Matching Panel** Analysts in Nano can view Calls or Knowledge Articles related to the call they're working on based on a matching Type Tier, Service, or Configuration Item. To learn more, see [page 35](#).

**Connectors** New and improved connectors are available.

- **Email Event Connector** The Email Event Connector can now attach a received email and its attachments to the corresponding call or request in ASM. It also now has a Matching tab allowing events to be matched to existing calls or requests. For more information, see **Email Event Connector** in the Online Help.
- **MS Azure Connector** The Microsoft Azure Connector connects ASM to Azure Resource Manager, enabling you to import configuration items into your ASM System on a regular basis. This is a new feature. For more information, see [page 38](#).
- **MS Azure DevOps Connector** The Microsoft Azure DevOps Connector connects ASM to Azure DevOps, providing the ability for Calls in ASM to create and update work items in DevOps, and DevOps work items to create and update Calls in ASM. This is a bi-directional connector that enables teams in both systems to track progress.
- **Snow Connector** The Snow Connector connects ASM to Snow License Manager, enabling you to expose live network resources and their relationships to your IT service management workflows. For more information see [page 40](#).

### General enhancements

- We have improved the speed and reliability of installation and upgrade processes.
- We have improved stability of the polling Services.
- We have improved performance and scalability of Extension Data storage.
- We have added tooltips to Text fields in browse tables (Search and Outstanding screens) so you can hover over the field to see all the text.
- The **Job Title** field has increased in length to 60 characters. Your information will be truncated if it exceeds 60 characters.
- The **Update Contact Details** screen for Self Service Portal is now configurable in Designer. The screen must be restored to default before it is used. Open Designer and select **Person** from the explorer pane on the left. The Update Contact Details screen is shown in the table. Open the screen and press **Restore Default**. The screen is now ready to be configured.





- **CTI MMA URLs.** Open the CTI interface for the caller using MMA URLs in this format:  
`https://server_url.com/system_name/core.aspx?mma=true&core_entity=101&entity_ref=phone_number`



```
https://alemba.com/system1/core.aspx?mma=true&core_entity=101&entity_ref=01775665500
```



## Introducing dashboards

The Alemba® dashboard platform enables you to create, manage, and share interactive business dashboards. These dashboards provide visual reports that enable you to track your corporate functions and performance relating to the data in your ASM database.

Using dashboards, you can:

- Work with a graphical, interactive and flexible interface
- Easily carry out CI analysis, view team workload, and have high level insight into the management of your ITSM system.
- Instantly access the ASM database using MS SQL Server or the Alemba API (RESTful Web Service)
- Capture and report specific data points, such as key performance indicators
- Poll the ASM database to view the current information
- Set up refresh schedules for the entire dashboard or individual widgets
- Measure productivity
- Align strategies and organizational goals

You can access your dashboards from within ASM Core, Nano and Self Service Portal.

## Designing your dashboards

You can use either a web designer or a desktop designer (Alemba Dashboard Designer) to create and distribute your dashboards.

For information about installing and configuring the dashboard platform and the Alemba Dashboard Designer, see the ASM v10.1 Prerequisites and Installation Guide.

For information about creating and configuring dashboards, see the ASM v10.1 Dashboards Quick Start Guide.

## The web designer





The web designer accesses the ASM database using the Alemba API.

Using the web designer, you can:

- **Create** a category, dashboard, data source, schedule, or slide show
- **Upload** a dashboard, widget, data source, or file

To use the web designer:

- Using Dashboard Server, at the top-right corner, select  to use the **Create** or **Upload** menus.

For example, select  > **Create** > **Dashboard** to create a new dashboard within web designer.



## The desktop designer (Alemba Dashboard Designer)



The desktop designer accesses the ASM database using the MS SQL Server data source.

Alemba Dashboard Designer has all the functionality of the web designer, and includes extra features.

You can also:

- Create multi-tabbed dashboards
- Link to another tab within a multi-tabbed dashboard
- Increase the dashboard size
- Use additional widgets: Pivot Grid; Bubble Chart; Scatter Chart; Combo Chart; Range Navigator; Radio Button; Check Box; Image; Custom Widget
- Configure dynamic dashboard parameters
- Filter on a relative date
- Set the fiscal year start
- Configure custom date time formatting
- Use weighted average and standard deviation in Summary Type
- Use extra functions when creating expressions, such as EMAIL, CURRENTUSER and FULLNAME
- Support manual sorting
- Create a user-based filter
- Use the dashboard Filter Panel, which is collapsible
- Configure a Dashboard Title label parameter
- Set calculations on the Choropleth Map
- Use initial selection
- Localize the user interface to any desired language



You cannot amend these extra desktop designer features using the web designer.


To use Alemba Dashboard Designer:

- Double-click the Alemba Dashboard Designer shortcut icon to start the application:



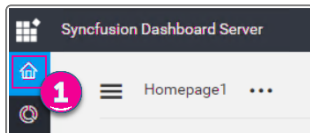


# Dashboard Quick Start Guide

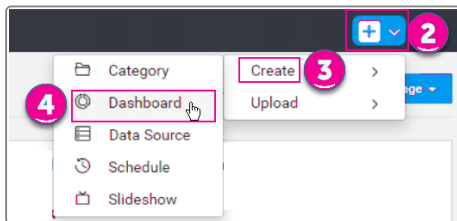
 This Quick Start Guide presumes you have correctly installed and configured your ASM System and the Dashboard Platform. For more information, see the ASM v10.1 Prerequisites and Installation Guide.

## 1. Create a dashboard

1. Using Dashboard Server, select **Homepages**.



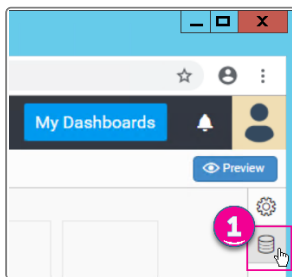
2. Select  > **Create > Dashboard**.



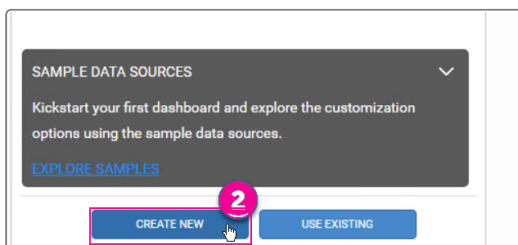
An Untitled dashboard appears in the web designer.

## 2. Create a data source

1. Select **Data Sources**.



2. Select **Create New**.

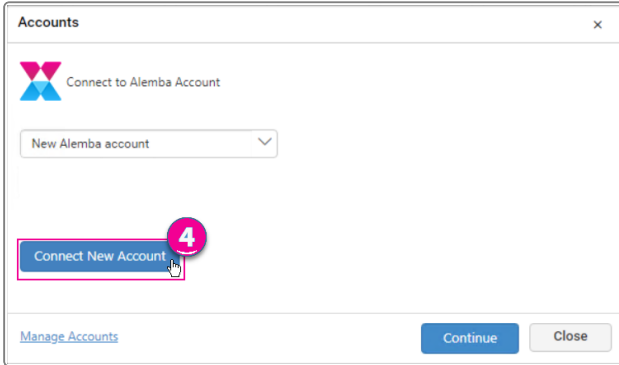




3. Select the **Alemba** connection type.



4. Select **Connect New Account**.



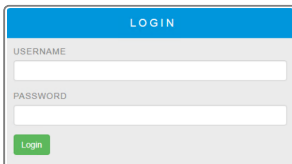
5. Type the **Base URL** for your Alemba Service Manager™ system in the format `http://ServerName/VirtualDirectory/` where ServerName is the Server Name or IP address.
6. Type the **Client ID**, which you will find in the Alemba API Explorer, in the **Dashboards** API Client.



7. Select **Connect**.



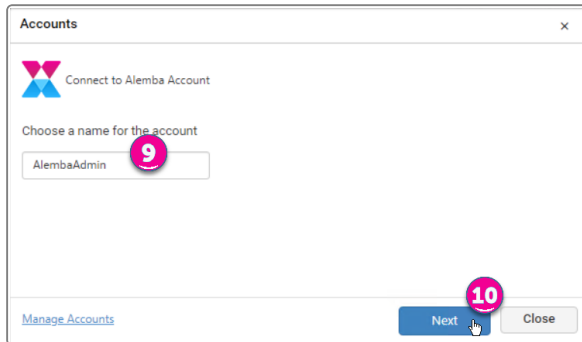
The Alemba Account login page appears.



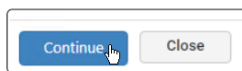
8. Type the Alemba Account credentials, then select **Login**.



- 9. Type a name for the account.
- 10. Select **Next**.

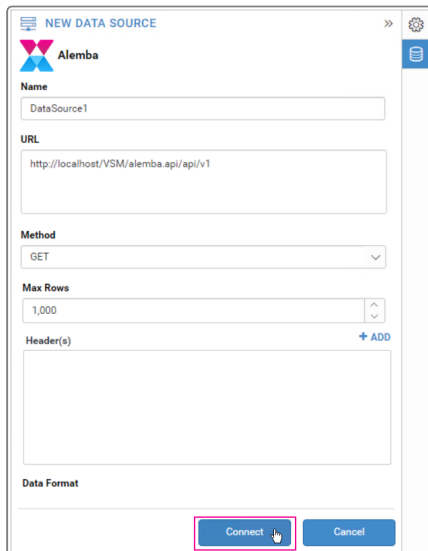


- 11. Select **Continue**.

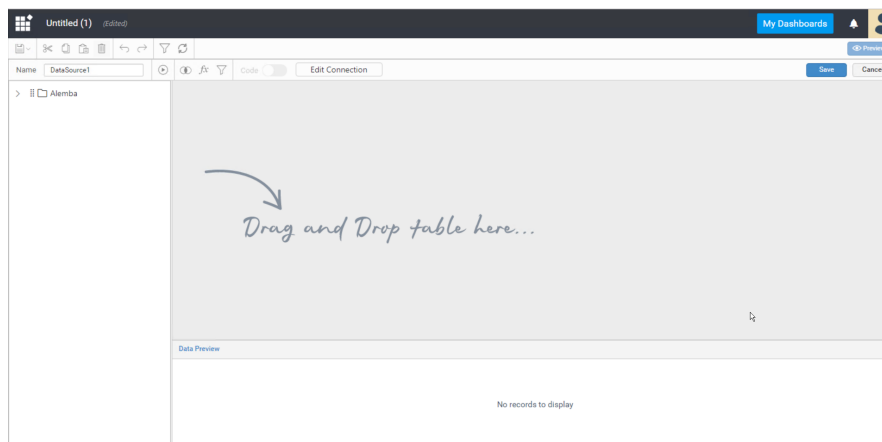


The data source appears on the right side of the dashboard.

- 12. Select **Connect**.



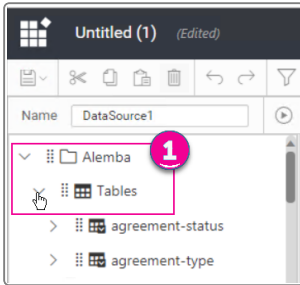
The data design view appears.



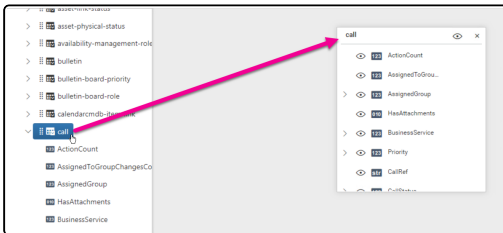


### 3. Configure the data source

1. In the Tree view, expand **Alemba**, then expand **Tables**.



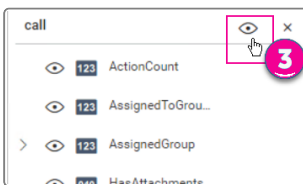
2. Drag the table that you want to extract data from onto the data design view window.



All the fields on that table are listed. The data preview is displayed below the table.

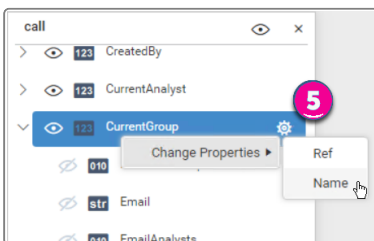
The changes you make here will not affect the underlying data.

3. On the table, select in the title bar to hide all columns.



We recommend that you globally hide all columns and only display the data you want to report on so that performance is not impacted. This provides a smaller data set for the system to refresh, and has less impact on performance.

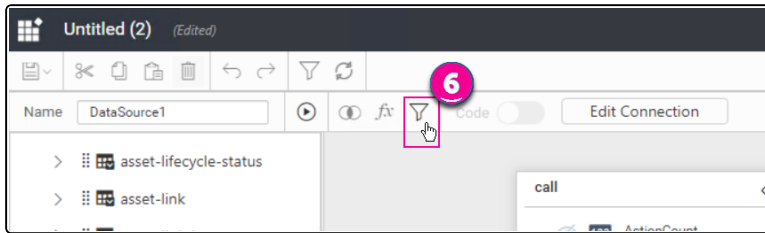
4. Select alongside each column you want to display.
5. Select > **Change Properties** > **Name** to display the field name.



The Data Preview updates for that column.

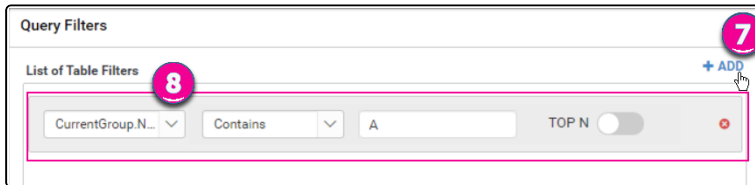


6. Select  to filter the table.

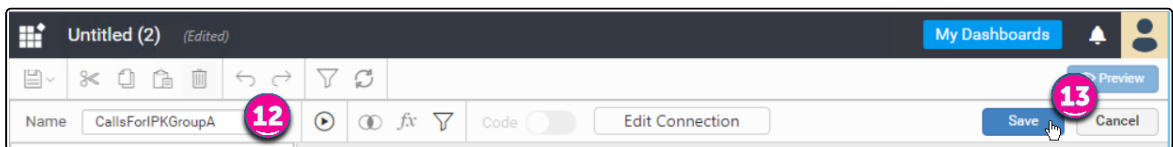


The Query Filters window appears.

7. Select **Add**.
8. Select a field from the drop-down list, then configure the filter parameters.

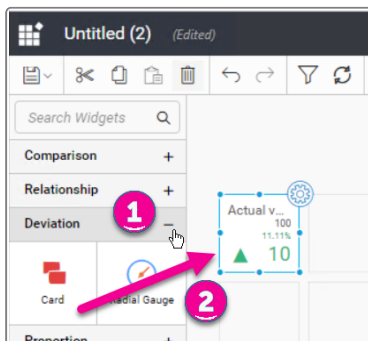


9. If required, select **Add** to add further filters.
10. Select **OK** to set the filter.
11. If required, add more tables.  
You will need to join multiple tables. For more information, see the Online Help.
12. Change the data source **Name** to describe the displayed data.
13. Select **Save** to return to the dashboard.



## 4. Add widgets to the dashboard

1. Expand or contract the menu to see the widgets easily.
2. Drag a widget onto the dashboard.

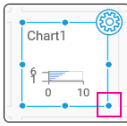


The Settings menu opens on the right side.





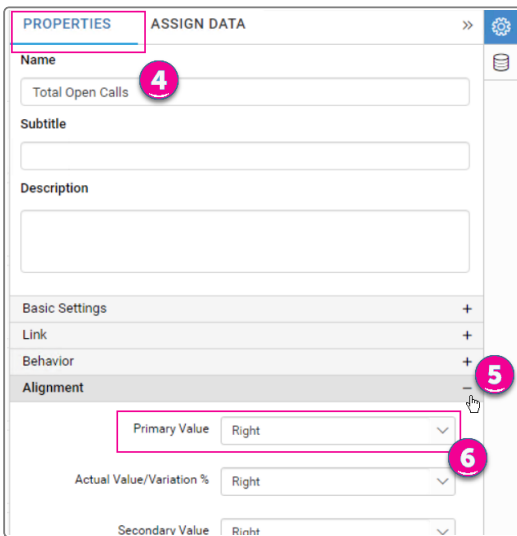
- If required, use the resize handles to change the widget display size.



You can also select and drag the widget to move it.

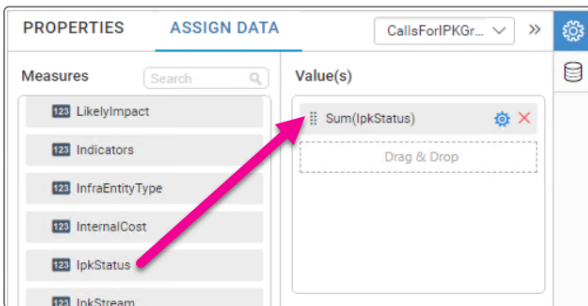
- In the **Settings** menu, on the **Properties** tab, change the **Name**.
- Expand or contract the **Properties** headings to view different adjustable settings.
- Change the **Properties** as required.

For example, you can change the title text color, and the value alignment.

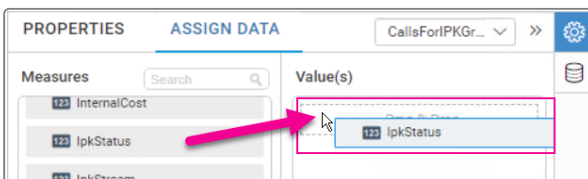


- In the **Settings** menu, on the **Assign Data** tab, drag one or more **Measures** into the **Value(s)** pane.

A measure is used to display the primary data. For example, number of calls.

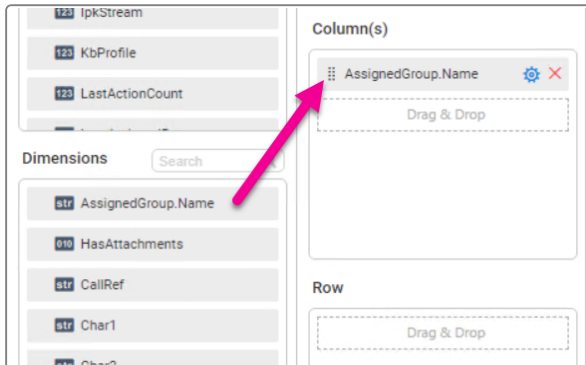


When you drag a Measure or Dimension into the panels, ensure your cursor points within the Drag & Drop boundary line before you release the item, otherwise it will not adhere to the panel.

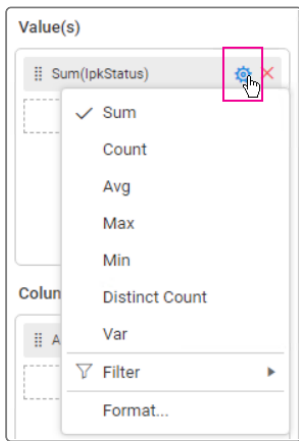




- 8. Drag one or more **Dimensions** into the **Column(s)** panel.  
A dimension divides the primary data into sections. For example, number of calls by Assigned Group.



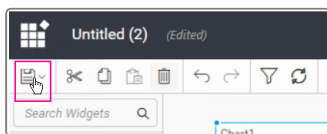
- 9. If required, adjust the primary data using the **Settings** menu.  
You can change the aggregation, filter the displayed information and format the display.



The widget updates to display your choices.

- 10. Drag more widgets onto the dashboard.  
The available Settings depend on the type of widget.

- 11. Select  to save the dashboard.



The Save As Dashboard window appears.

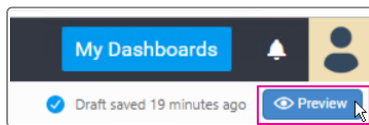
- 12. Select a **Category** from the drop-down list.
- 13. Type a **Name** to identify the dashboard.
- 14. Select a **Privacy Settings** option.  
**Private** displays the dashboard to those users with the appropriate permission. You must sign in to see private dashboards.  
**Public** displays the dashboard to anyone with a link to them. No sign-in is required.



**Unlisted** displays the dashboard to anyone with a link to them. No sign-in is required. Only dashboard owners can see unlisted dashboards in their dashboards list.

15. Select **Save**.

16. Select **Yes** to view what the dashboard looks like in a browser.
17. At any time, you can also select **Preview** to view the dashboard.



## 5. Make the dashboard available in the Alemba Service Manager™ Dashboard menu

You can configure the Alemba Service Manager™ Dashboard menu to open specific dashboards. For more information, see the ASM v10.1 Prerequisites and Installation Guide.



# Close and Reopen Calls in Self Service Portal

Users can close and reopen their own calls in the Self Service Portal. This function is enabled in the User's Self Service Portal Role and parameters for the Close and Reopen actions are defined in the Self Service Portal Settings.

## Administering Close and Reopen Settings

Before Users can close and reopen calls in the Self Service Portal, the Administrator needs to:

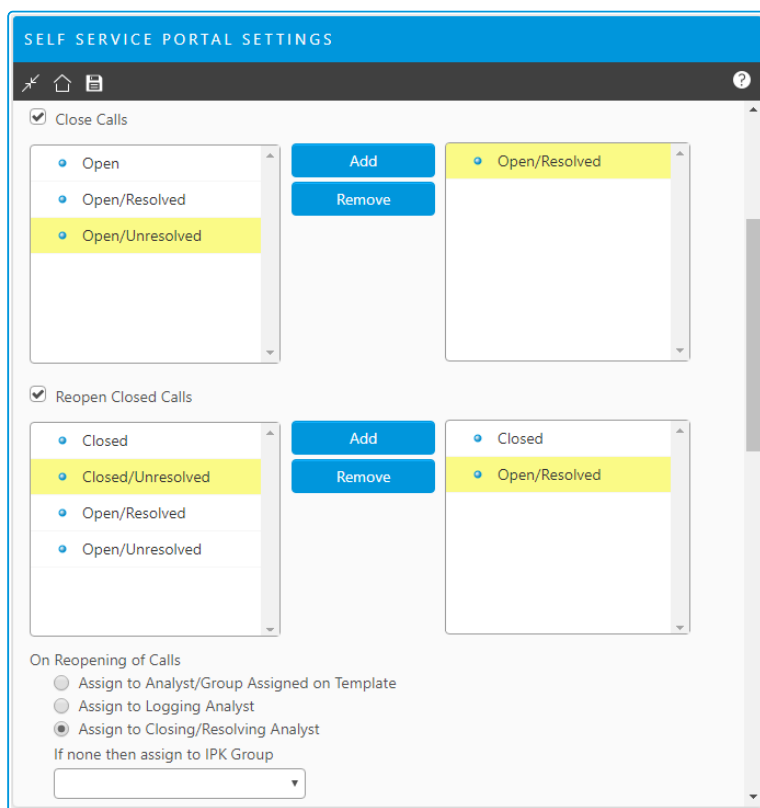
- Enable the function and define which calls can be closed and reopened
- Give permissions to Users through their Self Service Portal Role
- Design the screens Users see when closing and reopening calls

### Enabling Close and Reopen



You must have **Self Service Portal Setup** enabled within your **General Access Security Role** in order to configure any Self Service administration settings.

1. Select **≡ > Admin > System Administration**. The System Administration window appears.
2. In the Explorer pane, expand **Self Service Portal**, then select **Self Service Portal Settings**. The Self Service Portal Settings window appears.



3. Select the **Close Calls** checkbox to allow calls to be closed in the Self Service Portal.



4. To specify which calls can be closed, select Call States and **Add** them to the list on the right.
5. Select the **Reopen Calls** checkbox to allow calls to be reopened in the Self Service Portal.
6. To specify which calls can be reopened, select Call States and **Add** them to the list on the right.
7. Define what happens when a call is opened, by selecting an option in **On Reopening of Calls**.
8. Press **Save** to save your changes.

### Granting Permissions to Users

1. In System Administration explorer pane, select **Self Service Portal Roles**. The Self Service Portal Roles window appears. A browse table displays all of the existing Self Service Portal roles.
2. Open the Role you want to grant permissions to close and reopen calls.
3. Select the role's **Options** tab.

**SELF SERVICE PORTAL ROLE**

Role Name  
General

Options | CMDB | Content Access

**INCIDENT/PROBLEM**

- Log Calls
- Review Own Calls
- Review Org Calls
- Review All Calls
- Close Calls
- Reopen Calls

4. Select **Close Calls** to grant permission to close calls in the Self Service Portal.
5. Select **Open Calls** to grant permission to reopen calls in the Self Service Portal.
6. Press **Save** to save your changes.

### Designing the Screens



You must have **Designer** selected in your **General Access security role** to configure screens.

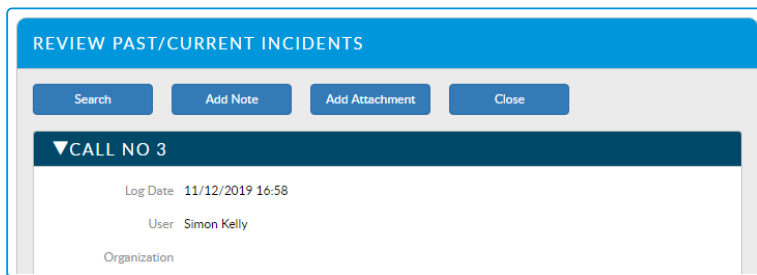
1. In Designer, and then select **Calls** from the explorer pane on the left. All designable call screens are displayed.
2. Select **Self Service Portal** in the **Screen Design** field to filter the screens.



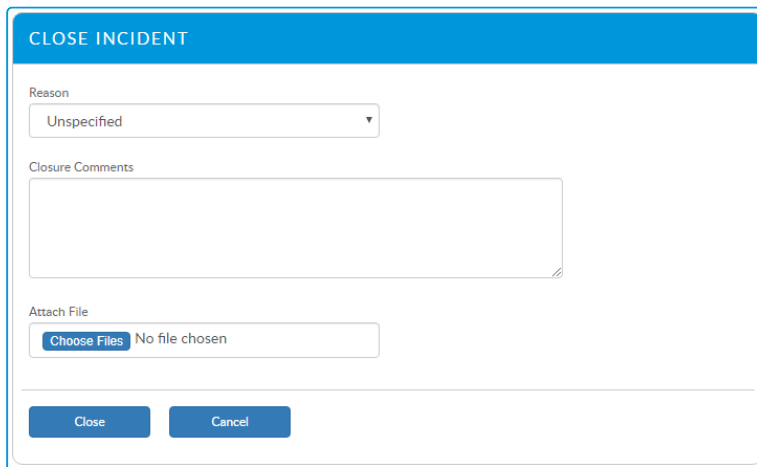
3. Select and open the screen you want to configure:
  - **Call Close** - the screen Users see when closing a call.
  - **Call Close Out** - confirmation screen after closing a call.
  - **Call Reopen** - screen Users see when reopening a call.
  - **Call Reopen Out** - confirmation screen after reopening a call.
4. Press Save to save your changes to the screen.

## Closing Calls in the Self Service Portal

1. Log into the Self Service Portal
2. Select the call you want to close. Calls that can be closed display a **Close** button at the top of the page.



3. Press the **Close** button.
4. The **Close Incident** screen is displayed.



This screen is configurable in Designer and may differ from the example.

5. Complete the details, which may included adding attachments.
6. Press **Close** to save your details and close the call.
7. The **Close Incident - Confirmation** screen is displayed, confirming the action was successful.



## Reopening Calls in the Self Service Portal

1. Log into the Self Service Portal
2. Select the call you want to reopen. Calls that can be reopened display a **Reopen** button at the top of the page.

REVIEW PAST/CURRENT INCIDENTS

Search Reopen

CALL NO 3

Log Date 11/12/2019 16:58

User Simon Kelly

Organization

3. Press the **Reopen** button
4. The **Reopen Incident** screen is displayed.

REOPEN INCIDENT

Reopen Note\*

Attach File

Choose Files No file chosen

Reopen Cancel



This screen is configurable in Designer and may differ from the example.

5. Complete the details, which may include adding attachments
6. Press **Reopen** to save your details and reopen the call.
7. The **Reopen Incident - Confirmation** screen is displayed, confirming the action was successful.



# Import Documents as Knowledge Articles

Create and update knowledge articles from documents. You can import MS Word, MS Excel, PDF, and Text files. Formatting from the imported document is preserved in the knowledge article, and the text can be searched as any other knowledge article.

## Defining Knowledge Document Imports




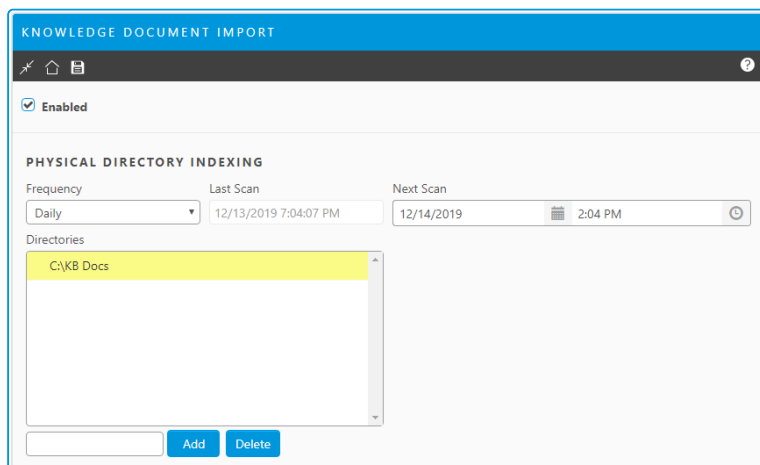
You must have **Knowledge Bank Set Up** enabled within your **General Access Security Role** to work with knowledge document imports.




The **ASM KB Import Service** must be running for the scan to run.

Define file directories to scan at regular intervals for new and updated documents. Updated documents update the associated knowledge article.

1. Select  > **Admin** > **System Administration**. The System Administration window is displayed. In the Explorer pane, expand **Knowledge Bank**.
2. Select **Knowledge Document Import**. The Knowledge Document Import window appears, showing currently defined file directories. The Directories list is empty when you first configure the system.



3. Select the **Enable** option to enable scans to occur at the scheduled time.
4. Use the **Frequency** field to select the frequency for the scan.
5. Use the **Next Scan** field to select a date and time for the next scan.
6. Type or paste a file directory address, and then press **Add** to add it to the list of directories. The directory can be local or on the network.
7. To remove a directory and stop scanning it, select it from the Directories list and then press **Delete**.
8. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.





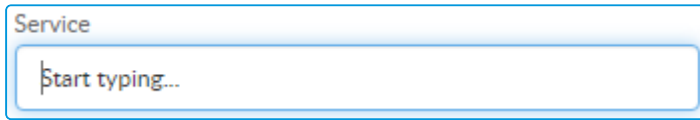
Imported Knowledge articles are created with a status of **Draft** and must be published by a moderator before they can be found in Knowledge Searches. The document's title becomes the title of the imported knowledge article.



## Enhanced Search Fields in Self Service Portal

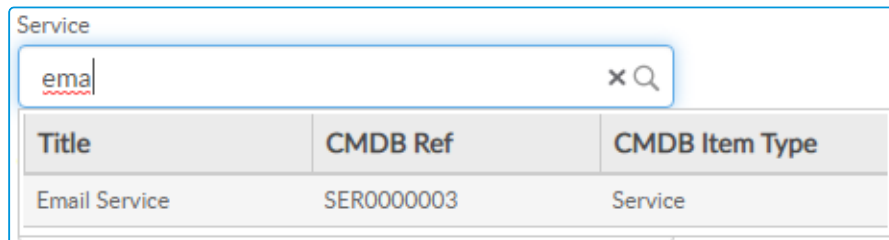
We have enhanced Search Fields in Self Service Portal to be more intuitive by displaying a text prompt and scroll bar. The search button, which opens Advanced Search, is now hidden until text is entered in the field.

All search fields in Self Service Portal now prompt to start typing.

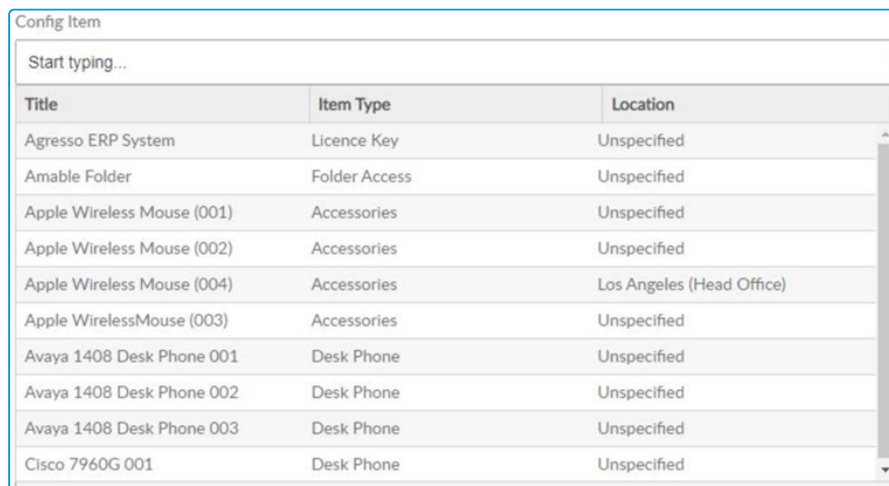



Search fields can be used in a number of different ways:


- **Start typing** to see matching results that adjust as you continue typing. This also reveals the Advanced Search button.



- Press **Enter** while the cursor is in the search field to see the first *n* results in alphabetical order; where *n* is the number of results configured by the Administrator.



- Press  to open the **Advanced Search** window. This button is shown after text is entered in the field or **Enter** is pressed within the field.

 For information on configuration settings for Search Fields, see **Configuring Search Fields** in the Online Help.



## Preview Features


Preview Features is a new section in System Administration providing early access to upcoming new features. Preview features are still in development and should only be enabled in Test environments.

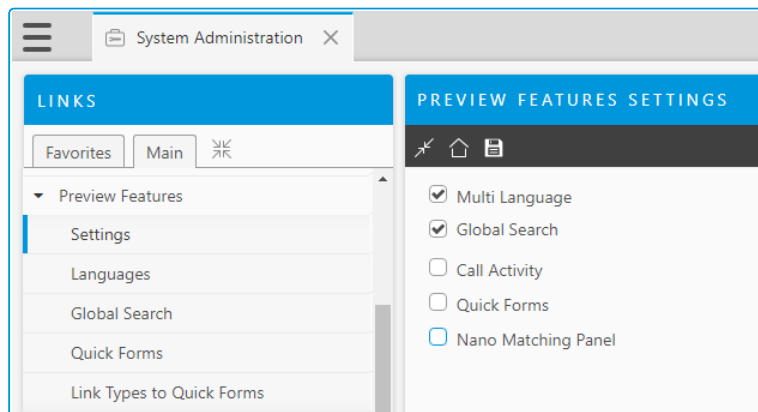
ASM v10.1 provides early access to:


- Multi-language
- Global Search
- Call Activities
- Quick Forms
- Nano Matching Panel

## Enabling Preview Features

Each feature is disabled by default and must be enabled in the **Settings** window before it can be configured or used.

1. Select  > **Admin** > **System Administration**. The System Administration window appears.
2. In the Explorer pane, expand **Preview Features**, then select **Settings**.
3. The **Preview Features Settings** window appears.




4. Select each feature you want to enable.
5. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.

Some features require additional configuration. For information on configuring and using each feature, continue reading.


## Multi-language in Self Service Portal

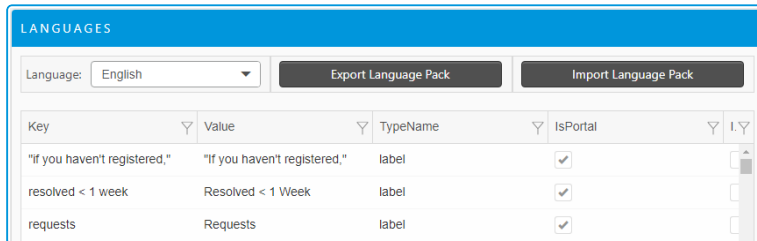
Enable Users to select their preferred language for the Self Service Portal.




 You must have a license for **Microsoft Translator Text API** if you require on-demand language translation.




## Enabling and Importing Languages

1. In the **Preview Features Settings** window, select **Multi Language**.
2. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.
3. In the System Admin explorer pane, expand **Preview Features**, then select **Languages**.
4. The Languages window is displayed.




Key	Value	TypeName	IsPortal	
"If you haven't registered,"	"If you haven't registered,"	label	<input checked="" type="checkbox"/>	
resolved < 1 week	Resolved < 1 Week	label	<input checked="" type="checkbox"/>	
requests	Requests	label	<input checked="" type="checkbox"/>	

5. Select a language from the **Language** field. The table refreshes to display translations in the **Value** column for selected language .

 English is the only language when first configuring the system.

6. To import additional languages:
  1. Select **Import Language Pack**.
  2. Browse to the location of the language pack and select it to start the import. Language packs must be Tab delimited CSV files.
  3. When the import is finished, press **OK** on the notification window.
7. To export a language pack for editing:
  1. Select the language you want to export in the **Language** field
  2. Select **Export Language Pack** to download the file to your Windows Downloads folder.

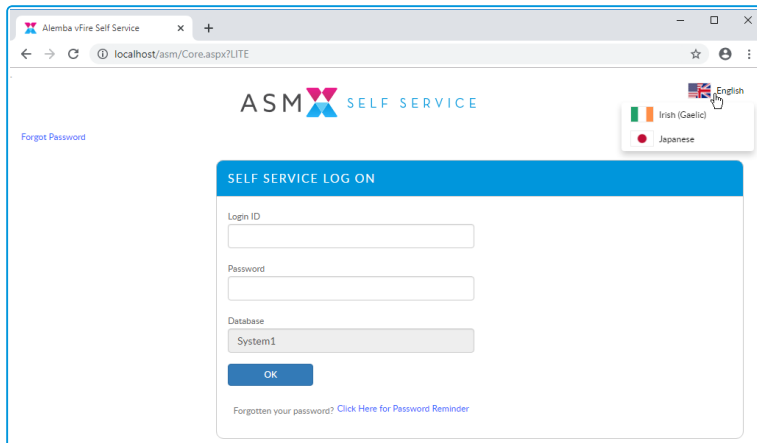
 For information on additional language packs, contact your Sales Manager.

## Changing Language in the Self Service Portal

Users can change their preferred language at any time using the language option in the banner. This option is visible on the login page and after logging in.



1. Navigate to the Self Service Portal.




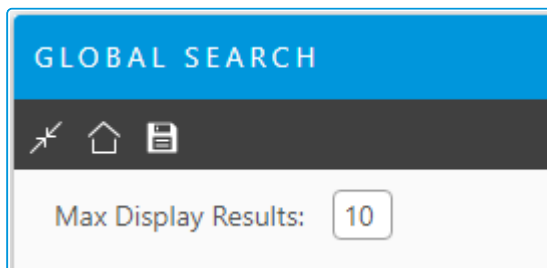
2. Select the language icon and country flag in the banner to see available all languages. English is the default language.
3. Select a language from the list. The page refreshes to display all text in the chosen language.


## Global Search in Self Service Portal

The global search bar in Self Service Portal enables Users to easily search across Knowledge, the Service Request Catalog, calls, and requests.

### Enabling Global Search

1. In the **Preview Features Settings** window, select **Global Search**.
2. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.
3. In the System Admin explorer pane, expand **Preview Features**, then select **Global Search**.
4. The Global Search window is displayed.

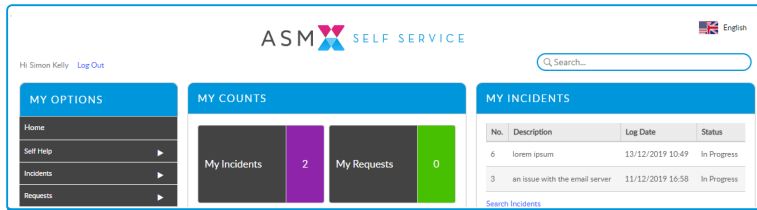


5. Enter a value in the Max Display Results field to change the number of results to display in the Self Service Portal Global search Results page.
6. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.

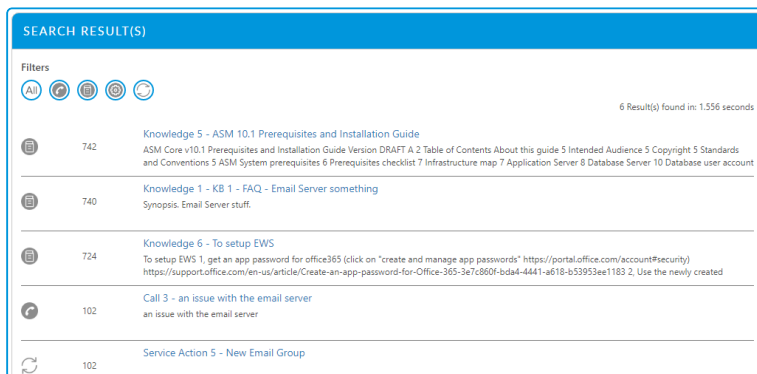


## Using Global Search in the Self Service Portal

1. Log into the Self Service Portal. The **Global Search** bar appears below the banner.



2. Type the search text and press **Enter**. The **Search Results** window is displayed.




3. Filter the results by selecting and de-selecting filter options.
4. Select the item you want from the results by clicking on its title. This navigates away from the Search Results window.
  - Select a Service Request Catalog item to open the corresponding submission form
  - Select a knowledge article see the knowledge details
  - Select a call to view the Incident Review page
  - Select a request view the Request Review page











## Call Activities

Create activity items for calls, much like an activity checklist. Analysts can close activity items as they complete them, which ensures the correct process is followed, and enables tracking of call progress. Administrators can create and reuse lists across multiple calls and call templates.

### Enabling and Configuring Call Activities

1. In the **Preview Features Settings** window, select **Call Activities**.
2. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.
3. In the System Admin explorer pane, expand **Preview Features**, then select **Call Activity Lists**.
4. The **Call Activity Lists** window is displayed.
5. All existing Call Activities are displayed. The list is empty on first time configuring the system.



6. Create an Activity List:
  1. Select . A new row is inserted in the browse table.
  2. Select  in the row and then type a name for the activity list.
  3. Select  in the row to save the changes.
  4. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.
7. Add Activities to the Activity List:
  1. Select an Activity List and then .
  2. The **Call Activities for List** window is displayed.
  3. Select  to create a new activity in the list.
  4. Type a **Description** and **Details** for the activity, then select  to save the activity.
  5. Continue adding activities to the list as needed.
  6. Change the order of activities in the list using  and .
  7. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.

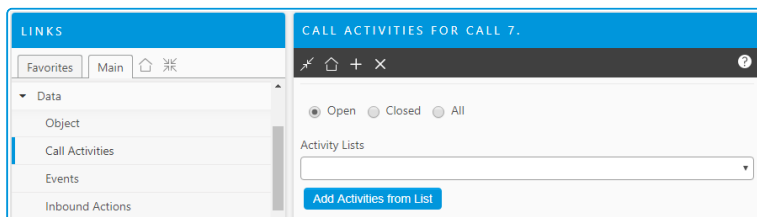
### Using Call Activities in Calls


From within a call in ASM Core, you can:

- Add activities to the call from an Activity List, or create new activities.
- View activity details.
- Close an activity when it is completed.
- View open and closed activities for the call.

### Adding Activities and Activity Lists to a Call

1. Open the **Call Details** window.
2. In the Explorer menu, expand **Data**, then select **Call Activities**.
3. The **Call Activities** window is displayed.



4. To add an Activity List to the call:
  1. Use the **Activity Lists** field to select the activity list you want to add to the call.
  2. Press **Add Activities from List**.
  3. All activities from the selected list are added to the call and appear in the table.
5. To create an Activity on the call:
  1. Select  to create a new activity item. The **Activity Details** window is displayed.



Activity Details

Call Activity  
No

Owning Officer  
Simon Kelly

Description

Actions

Raised By

Created Date

Closed By

Closed Date

OK Cancel

2. Type a **Description** and **Details** for the activity
3. Press **OK**. The activity is added to the call and appears in the table.

#### Viewing and Closing Activities on a Call

1. On the **Call Activities** window, double-click an activity to open it.
2. The **Activity Details** window is displayed.
3. To close the activity, select a **Closed Date**.
4. Press **OK**. The activity is closed. It cannot be reopened.

#### Viewing all Call Activities

1. Select **≡** > **View** > **Call Activities**. The Current Call Activities window is displayed, listing all activities in the system.





Activity ID	Call Number	Description	Actions	Created Date	Created By	Current Officer
30	120 asdsd		asdsd	31/10/2018 21:21	Simon Kelly	Simon Kelly
31	120	Test	Test	31/10/2018 23:42	Simon Kelly	Simon Kelly
32	120	My new activity		01/11/2018 22:03	Simon Kelly	Sylvia Doe
33	120	Let's try that again.	Now you can close it, I'm done.	01/11/2018 22:08	Simon Kelly	Sylvia Doe
34	120	test for multi-close.		01/11/2018 22:09	Simon Kelly	Sylvia Doe
35	120	This is my first action.	Do this then do that.	01/11/2018 23:30	Simon Kelly	Simon Kelly
36	120	This is my first action.	Do this then do that.	01/11/2018 23:31	Simon Kelly	Simon Kelly
37	120	Sec	this	01/11/2018 23:31	Simon Kelly	Simon Kelly
38	120	333	aaa	01/11/2018 23:31	Simon Kelly	Simon Kelly
39	120	444	bbb	01/11/2018 23:31	Simon Kelly	Simon Kelly
40	120	This is my first action.	Do this then do that.	01/11/2018 23:33	Simon Kelly	Simon Kelly
41	120	Sec	this	01/11/2018 23:33	Simon Kelly	Simon Kelly

2. Select an option to filter the Activities according to status:
  - **Open** – displays all open activities
  - **Closed** – displays all closed activities
  - **All** – displays all activities, regardless of status
3. Double-click an activity to view the Activity Details window.

## Quick Forms

Display a list of pre-defined questions in the Call Details screen relevant to the Type of the Call, improving call resolution time, ensuring important information is captured, and supporting new staff as they get up to speed.

### Enabling and Configuring Quick Forms

1. In the **Preview Features Settings** window, select **Quick Forms**.
2. Select to save the changes. Provide the **Change Reasons** if prompted to do so.



### Creating a Quick Form

1. In the System Admin explorer pane, expand **Preview Features**, then select **Quick Forms**.
2. The Quick Forms window is displayed, listing existing quick forms and their questions. There are no forms on first time configuring the system.

QUICK FORMS														
<table border="1"> <thead> <tr> <th>Quick Form Name</th> </tr> </thead> <tbody> <tr> <td>H&amp;S Incident Form</td> </tr> <tr> <td>HR Incident Form</td> </tr> </tbody> </table>	Quick Form Name	H&S Incident Form	HR Incident Form	<table border="1"> <thead> <tr> <th>Question</th> <th>Is Required</th> </tr> </thead> <tbody> <tr> <td>Who was involved?</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Who witnessed it?</td> <td><input type="checkbox"/></td> </tr> <tr> <td>HR Response</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Follow-up recommendati</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Question	Is Required	Who was involved?	<input checked="" type="checkbox"/>	Who witnessed it?	<input type="checkbox"/>	HR Response	<input checked="" type="checkbox"/>	Follow-up recommendati	<input type="checkbox"/>
Quick Form Name														
H&S Incident Form														
HR Incident Form														
Question	Is Required													
Who was involved?	<input checked="" type="checkbox"/>													
Who witnessed it?	<input type="checkbox"/>													
HR Response	<input checked="" type="checkbox"/>													
Follow-up recommendati	<input type="checkbox"/>													

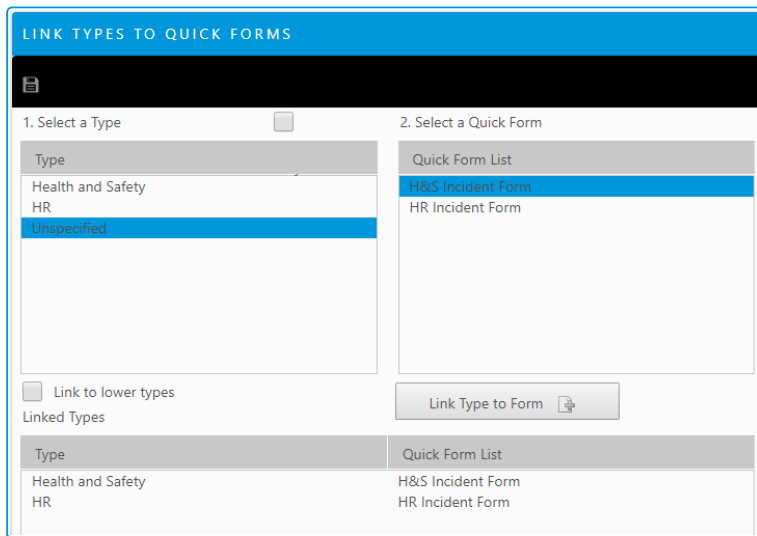
3. To create a new quick form, select beside **Form Lists**.
4. A new row is added. Type a name for the quick form.
5. To add questions to the quick form, select the form on the left, and then select beside **List Items**.




6. A new row is added. Type the question in the row. This question will appear in the call details.
7. Select the **Is Require** check box if the question's answer needs to be verified by the analyst.
8. To change the question order, select a question and then press  to move the question up or down
9. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.

### Linking a Quick Form to Type Tiers

1. In the System Admin explorer pane, expand **Preview Features**, then select **Link Types to Quick Forms**.
2. The Quick Forms window is displayed, showing Quick Forms, Type Tiers, and any existing links between them.



3. Select a Type Tier from the list on the left, and then select a Quick Form from the list on the right.
4. Press **Link Type to Form** to link the Type and Quick Form. The linked items appear in the **Linked Types** table.
5. To remove a link, select the linked items in the Linked Types table and then press **Remove Link**.
6. Select  to save the changes. Provide the **Change Reasons** if prompted to do so.

### Using Quick Forms in a Call

1. Open a call in ASM Core.



2. Select a Type Tier in the **Type** field. If the selected Type is linked to a quick form the Quick Forms section appears in the Call Details screen.

3. Use the **Quick Form** field to select a different quick forms linked to that Type Tier.

Selecting a different quick form clears all answers from the previous form.

4. Enter an answer for each question.
5. Answers that require verification by the analyst have a check box beside them. Select the check box.
6. A progress bar at the top of call details page shows the percentage of questions completed.
7. Answers are saved to the call when it is Saved, Deferred, Forwarded, or Closed.

## Nano Matching Panel


Use the Matching Knowledge panel and Matching Calls panel to see knowledge articles and calls similar to the current call that may contain solutions or valuable information.

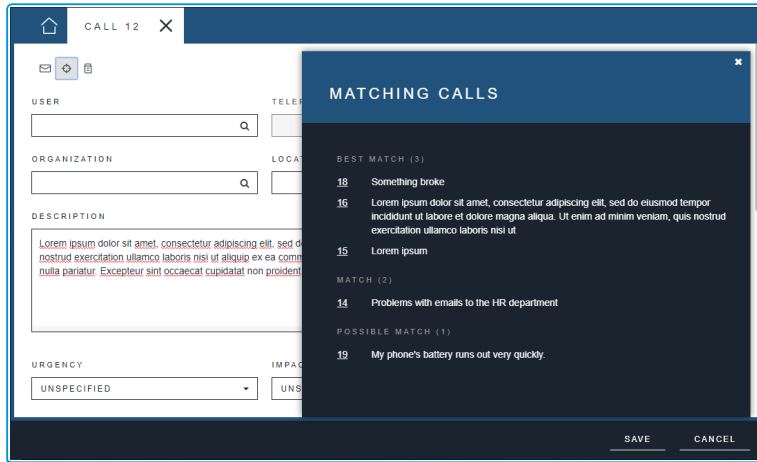
### Enabling Matching Panel for Nano

1. In the **Preview Features Settings** window, select **Nano Matching Panel**.
2. Select to save the changes. Provide the **Change Reasons** if prompted to do so.




## Using the Matching Calls Panel in Nano

1. Open a call in Nano
2. Select  to open the **Matching Calls** panel.



3. Calls that have a matching Configuration Item, Service, or Type are displayed in the panel.
4. Calls with the three (3) matching fields are listed first, followed by calls with two (2), and calls with one (1) matching field are listed last.
5. Select a call to view it's details in a new tab in Nano.

## Using the Matching Knowledge Panel in Nano

1. Open a call in Nano
2. Select  to open the **Matching Knowledge** panel.
3. Knowledge articles that have a matching Service, or Type are displayed in the panel.
4. KBs with the two (2) matching fields are listed first, KBs with one (1) matching field are listed last.
5. Select a knowledge article to view it's details in a new tab in Nano.



## Configuring EWS for Incoming and Outgoing Email



Before you can configure outgoing email for EWS you must generate an **app password** for the mail account. Log into Office365 and navigate to the Security & Privacy page, then selected **Create and manage app passwords**.

You can set the following options to configure outgoing email and incoming for **EWS**:

<b>Name</b>	The name of the outgoing email system you are adding or editing. This must be unique.
<b>Protocol</b>	A read-only field displaying the email protocol for this email server account.
<b>Server</b>	The web address for Office365 Exchange.
<b>Port Number</b>	The port number of the mail server to which ASM Core must connect. The standard EWS port is 443, which is the default setting.
<b>Login ID and Password</b>	The email address of the mail account, and corresponding app password generated from Office 365.
<b>Active</b>	Select this option to activate this email account in the system so that it can be used.
<b>Enable SSL Certificate Generation</b>	Select this option when the SSL Certificate of the exchange server needs to be validated. Required when <b>Require HTTPS</b> is enabled.
<b>Exchange Version</b>	Select the version of the exchange server.
<b>Use UTC Time Zone</b>	Not Applicable.
<b>Accept GZIP Encoding</b>	Not Applicable.
<b>Connection Timeout</b>	Not Applicable.
<b>Content Encoding</b>	Not Applicable.
<b>Shared Mailbox</b>	Not Applicable.
<b>Require HTTPS</b>	Selected by default. Required for Exchange 365.

Finish configuring the incoming and outgoing email settings by completing the fields not specific to EWS. For information on those fields, see **Email Settings** in the Online Help.



## MS Azure Connector

The Microsoft Azure Connector connects ASM to Azure Resource Manager using API methodology, enabling you to import configuration items into your ASM System on a regular basis. The Microsoft Azure Connector enables you to expose the following resource types:

- Application Gateway
- Disk
- IP Configuration
- Network Interface
- Public IP Address
- Resource Group
- Snapshot
- Subnet
- Virtual Machine
- Virtual Network
- Virtual Network Gateway



You can use Azure Resource Manager to monitor Azure resources for ASM.

## Installing the Microsoft Azure Connector

For information about installing the Microsoft Azure Connector, contact your Account Manager.



For information about versions and licensing, see [ASM Connector Matrix](#).

After installation, the following files should exist on your server:

- Alemba.Connector.Azure.dll
- Alemba.Connector.Azure.icnf

The .icnf file contains information about each resource type and their mapped fields, including details like field data type.



The .icnf file is installed here by default: `C:\Program Files\Alemba\vFire\SystemName\Config`, where *SystemName* is the name of your current ASM System.

## Connection parameters

Alemba Service Manager™ uses the following connection parameters:

Parameters	Description
Client ID	The application (client) ID for Azure Resource Manager.
Client Secret	The authentication key for Azure Resource Manager.



Parameters	Description
Tenant ID	The ID of the Azure Active Directory where you installed Azure Resource Manager.
Subscription ID	The GUID that uniquely identifies your subscription to use Azure services.

## Required permissions

You need the following Configuration Management permissions to configure and use the Microsoft Azure Connector:

- External Resource Search
- Federated CMDB Admin
- The required CMDB permissions for your system



For more information about Configuration Management permissions, see **Configuration Management Security Roles** in the online help.

## Exposing Azure Resource Manager data in ASM



For information about accessing and managing your Azure Resource Manager data in ASM, see **Managing External Resources** in the online help.

You can use the external resource **Linked Items** to do the following:

- Link the external resource to an existing ASM CMDB Item
- Create a new linked CMDB item
- Review the item – depending on your CMDB permissions, this option can open the resource in view mode, rather than edit mode
- Manage the columns on display


For more information, see **Federated CMDB Toolbar Buttons** in the online help.




# Snow Connector


The Snow Connector connects Alemba Service Manager™ to Snow Inventory and License Manager using API methodology, enabling you to expose live network resources and their relationships to your IT service management workflows. The Snow Connector enables you to expose the following resource types:

- Computer
- Mobile Device
- Application
- User

 You can use Snow Inventory and License Manager to discover devices, software and cloud services on all platforms, audit software installs and track hardware and software usage.


## Installing the Snow Connector

 For information about installing the Snow Connector, contact your Account Manager.

 For information about versions and licensing, see [ASM Connector Matrix](#).

After installation, the following files should exist on your server:


- Alemba.Connector.Snow.Rest.dll
- Alemba.Connector.Snow.Rest.icnf

 The .icnf file is installed here by default: C:\Program Files\Alemba\vFire\SystemName\Config, where *SystemName* is the name of your current ASM System.

The .icnf file contains information about each resource type and their mapped fields, including details like field data type.

## Connection parameters

Alemba Service Manager™ uses the following connection parameters:

Parameters	Description
Snow Inventory RESTful API URL	<p>You can connect to Snow using the following URL format:</p> <p><code>https://endpoint/api/customers/customernumber</code></p> <p>where <i>endpoint</i> is the Snow server IP address, server name, or virtual directory, and <i>customernumber</i> is the customer's number within Snow Inventory.</p> <p> <code>https://www.MyCompany.com/api/customers/45/</code></p>
Login ID	Credentials for the server where Snow Inventory is installed





Parameters	Description
and Password	

## Required permissions

You need the following Configuration Management permissions to configure and use the Snow Connector:

- External Resource Search
- Federated CMDB Admin
- The required CMDB permissions for your system



For more information, see **Configuration Management Security Roles** in the online help.

## Exposing Snow Inventory data in Alemba Service Manager™

For information about accessing and managing your Snow Inventory and License Manager data in Alemba Service Manager™, see **Managing External Resources** in the online help.

You can use the external resource **Linked Items** to do the following:

- Link the external resource to an existing Alemba Service Manager™ CMDB Item
- Create a new linked CMDB item
- Create a new linked person
- Review the item – depending on your CMDB permissions, this option can open the resource in view mode, rather than edit mode
- Manage the columns on display

For more information, see **Federated CMDB Toolbar Buttons** in the online help.



## Further Information

### Product Information and Online Support

For information about Alemba® products, licensing and services, visit [www.alemba.com](http://www.alemba.com).

For release notes and software updates, see [www.alemba.help](http://www.alemba.help).

For product documentation, training materials and videos, see [www.alemba.help/help](http://www.alemba.help/help).



You may need to register to access some of these details.

### Technical Support

For technical support, visit: [www.alemba.com](http://www.alemba.com) and select the **ASM support** link. You will need to log in to the Alemba® Self Service Portal to contact the Alemba® Service Desk.

### Comments and Feedback

If you have any comments or feedback on this documentation, submit it to [info@alembagroup.com](mailto:info@alembagroup.com).