SMA for Service Manager

Deployment Guide

Gridpro AB

Rev: 1.1.6135 (SCSM 2012 versions) & 2.0.6135 (SCSM 2016 & later)
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Prerequisites

Service Management Automation (SMA) for Service Manager makes it possible to integrate the Service Management Automation workflow engine with Microsoft System Center Service Manager™. The integration works similar as the out of the box integration between Orchestrator and Service Manager.

The software is installed on the Service Manager management server that is configured to be the workflow server.

NOTE: The first Service Manager management server that is installed automatically becomes the workflow server.

> Important: There are two separate builds of the SMA Connector available. One for Service Manager 2012 versions and one for Service Manager 2016 and later (TP5 and above).
>
> If you are installing or upgrading the SMA Connector on a Service Manager 2016 or later environment, please make sure you use a version of the connector that is higher than 2.0. If you are still on Service Manager 2012, please make sure you use an installer with a lower version number than 2.0.
>
> If you have any questions, please contact support@gridprosoftware.com.

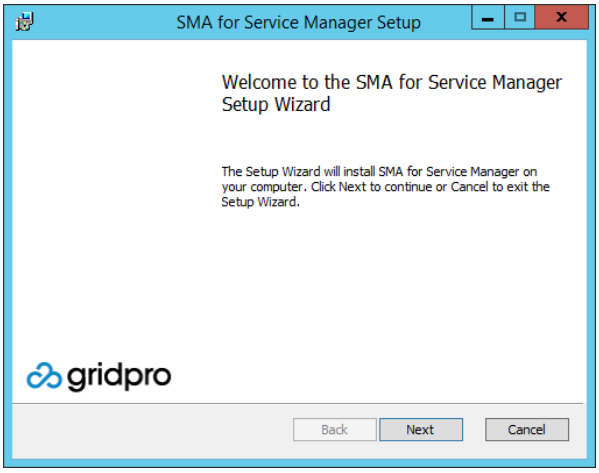
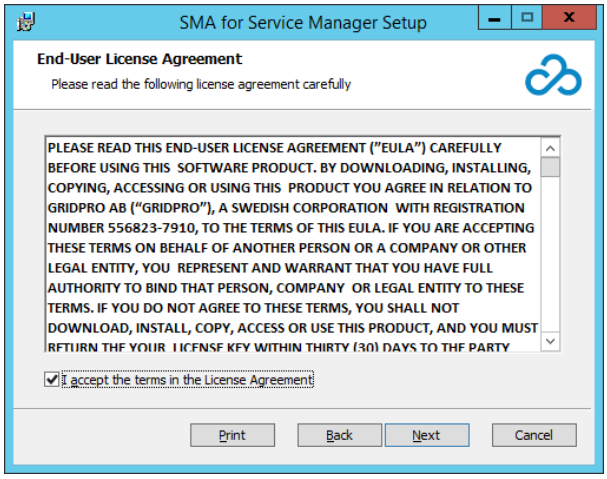
Server installation requirements

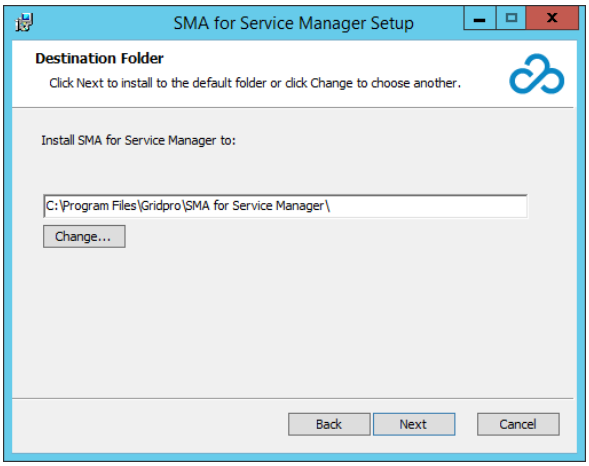
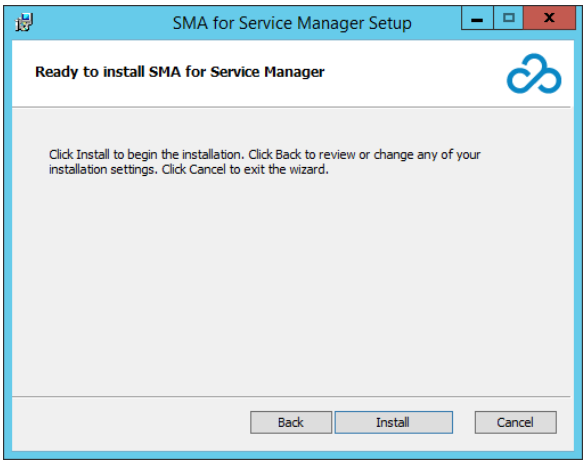
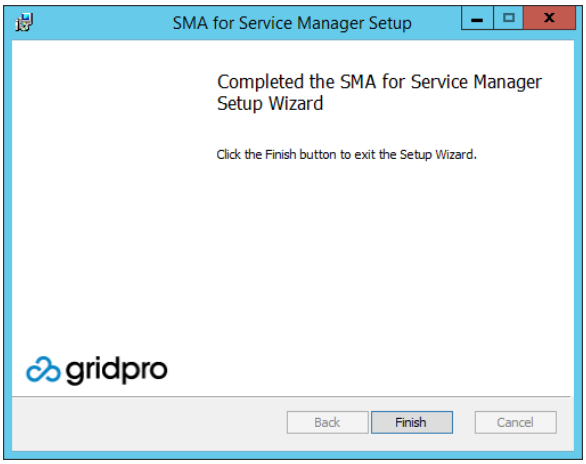
- The server needs to be the Microsoft System Center Service Manager workflow server

Installation

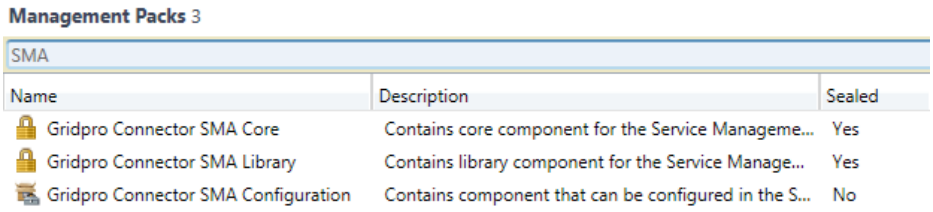
This section is a step-by-step instruction how to install the SMA for Service Manager software.

SMA for Service Manager

☐	**IMPORTANT:** Login using a user account that is a member of the local server administrator group and has been assigned the SCSM Administrator role in Service Manager. Make sure that the media is being installed on a Service Manager server configured to be the workflow server.
☐	Run **SMA for Service Manager vX.X.XXXX.msi**
☐	Click **Next** 
☐	Read the End-User License Agreement carefully and if you accept the terms, check **I accept the terms in the License Agreement**. Then click **Next** 

☐	Select the folder to install the files to. Click **Next** 
☐	Click **Install**  *Note: If prompted by User Account Control, click **Yes** to continue the installation*
☐	Click **Finish** 

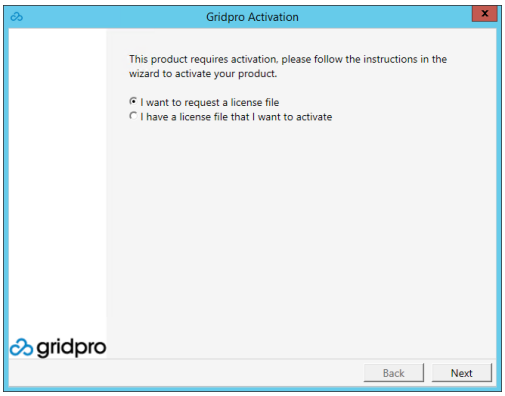
Verify Installation

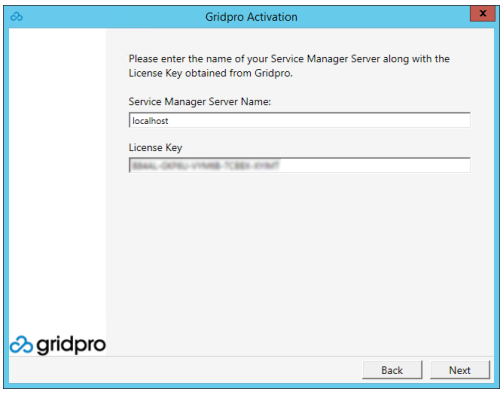
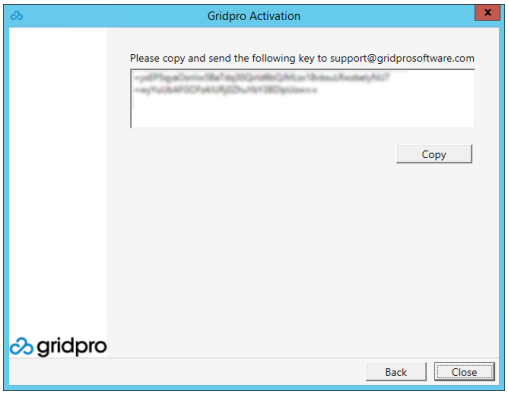
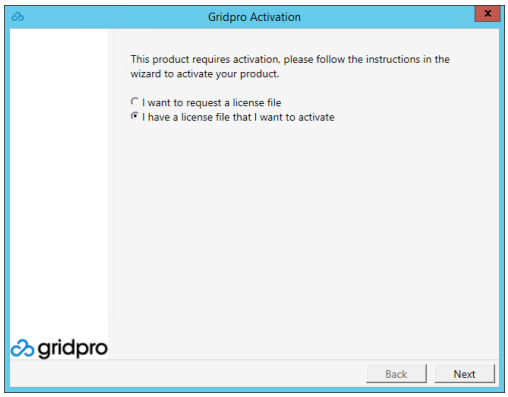
☐	Open the **Service Manager Console**
☐	Navigate to **Administration → Management Packs**
☐	Verify that the following three management packs are present: • Gridpro Connector SMA Core • Gridpro Connector SMA Library • Gridpro Connector SMA Configuration 
☐	Close the Console

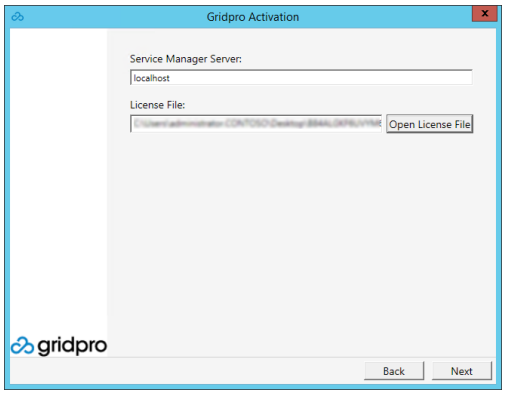
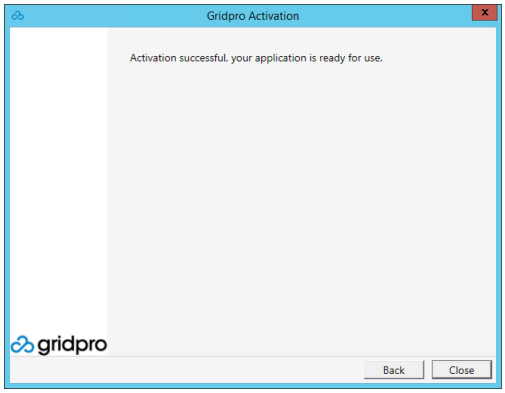
License Activation

The section below shows a step-by-step instruction how license activation is accomplished. It is the same procedure for evaluation activation and commercial registration. When performing a commercial activation, any active evaluation licenses will automatically be removed and replaced by the commercial license.

License Activation Process

☐	Launch the **SMA License Activation Wizard** from the start menu
☐	 Select **I want to request a license file**, then click **Next**

☐	 Specify **Service Manager Server Name** and **License Key** provided by Gridpro, then click **Next**
☐	 Click **Copy** and paste the information into a text file. Save the text file for later use. Then click **Close**
☐	Send the text file saved earlier as an attachment together with your company name and license key to: support@gridprosoftware.com. You should expect to receive a response within 24 hours (during business days).
	When you receive a response email containing a license file you can continue to the next step.
☐	Launch the **SMA License Activation Wizard** **NOTE:** Be patient
☐	 Select **I have a license file I want to activate**, then click **Next**

☐	 Specify **Service Manager Server** name. Click **Open License File** and browse to the license file received from Gridpro, and click **Open** Click **Next**
☐	 Click **Close**
☐	Your license has now been activated and SMA for Service Manager is ready to be used

Uninstallation

Uninstalling SMA for Service Manager should be done in multiple steps, starting with the actual software, then by removing any available SMA connectors and lastly by deleting the management packs.

Software

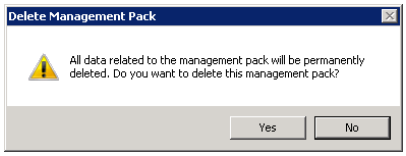
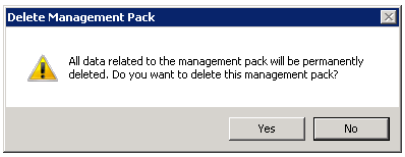
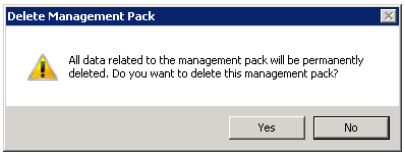
On the server that has SMA for Service Manager installed.	
☐	Click **Start – Control Panel**
☐	Click **Uninstall a program**
☐	Right-click **SMA for Service Manager** and select **Uninstall**
☐	Click **Yes**
☐	Click **Yes**, on any User Access Control popup question
☐	Uninstallation completed *Note: If prompted about reboot, perform a reboot once the uninstallation is completed.*

Connectors

On a server or client with Service Manager console installed.	
☐	Click **Start – All Programs – Microsoft System Center – Service Manager – Service Manager Console**
☐	Click **Administration** tab
☐	Select **Connectors**
☐	Select any connector that has Data Provider Name of **Service Management Automation Runbook Connector**
☐	Select **Delete** in right-pane

Management Packs

On a server or client with Service Manager console installed.	
☐	Click **Start – All Programs – Microsoft System Center – Service Manager – Service Manager Console**
☐	Click **Administration** tab
☐	Select **Management Packs**

☐	In the center-pane, select **Service Management Automation Configuration for Service Manager**
☐	Select **Delete** in the right-pane
☐	 Click **Yes**
☐	In the center-pane, select **Service Management Automation Library for Service Manager**
☐	Select **Delete** in the right-pane
☐	 Click **Yes**
☐	Management Packs uninstallation completed
☐	In the center-pane, select **Service Management Automation Core for Service Manager**
☐	Select **Delete** in the right-pane
☐	 Click **Yes**
☐	Management Packs uninstallation completed

Getting Started

The first step to getting started is to import the available Runbooks in SMA into the Service Manager Database. This is done by using a connector.

☐	Open the **Service Manager Console**
☐	Navigate to **Administration → Connectors**
☐	Click **Create Connector → Service Management Automation connector**
☐	Complete the wizard by following the instructions
☐	Select the created connector
☐	Click **Synchronize Now** and wait for the Runbook synchronization to finish

The second step is to create a template for a Runbook that can be used when creating activities for Service Requests or Incidents.

☐	Open the **Service Manager Console**
☐	Navigate to **Library → SMA Runbooks** If the connector was successful, a number of Runbooks should be listed
☐	Select any of the Runbooks
☐	Click **Create SMA Runbook Automation Activity Template**
☐	Select a **Name** for the template, which **Management Pack** the template should be saved to and click **OK**
☐	In the **General** tab, check the **Is Ready For Automation** checkbox *Note: If the Is Ready For Automation checkbox is not checked, no SMA Runbook will be started when the activity is set to "In Progress" until you check the checkbox.*
☐	Navigate to the **Runbook** tab
☐	Map the Runbook paramaters that should be used to static values or to fields available on the activity *Note: SMA allows many different types on parameters, some which are not yet supported by SMA for Service Manager. Please see which types that are supported and under which scenario in Appendix A.*
☐	Click **OK** to save the template

Lastly the newly created activity template should be used in e.g. a Service Request.

☐	Open the **Service Manager Console**
☐	Navigate to **Work Items → Service Request Fulfillments → Create Service Request from Template**
☐	Select any Service Request Template and click **OK**
☐	Navigate to the **Activities** tab
☐	Click the **+** icon to add a new activity
☐	Select the previously created Runbook activity template and click **OK**
☐	Configure the activity based on your requirements and click **OK**
☐	Configure the Work Item based on your requirements and click **OK** to save the template

A more advanced scenario is to use the Request Offering feature in Service Manager to integrate the Service Catalogue to utilize SMA Runbooks.

☐	Open the **Service Manager Console**
☐	Navigate to **Library → Templates**
☐	Click **Create Template**
☐	Pick a **Name** for the template and select **Service Request** as the class to use
☐	Fill in information the template should contain
☐	Navigate to **Activities** tab. click the **+** icon to add a new activity
☐	Pick the **Runbook Activity Template** created earlier and click **OK**
☐	Navigate to **Library → Service Catalog → Request Offerings**
☐	Click **Create Request Offering**
☐	Give the Request Offering a name and pick the previously created Service Request Template
☐	Click **Next**
☐	Create the prompts for which values you want to map to the SMA Runbook activity
☐	Click **Next**
☐	Configure the prompts according to business requirements

☐	Click **Next**
☐	Select the **SMA Runbook activity** from the Object list
☐	Based on which properties the parameters of the SMA Runbook were bound to on the **SMA Runbook activity** (Text1, Text2 etc.), map the prompt output to these properties. Example: If Runbook Parameter "UserName" was bound to Text1 on the SMA Runbook Activity, then map the corresponding prompt output to the Text1 property on the SMA Runbook Activity. This will result in that the output prompt value will be used for parameter "UserName" when triggering the SMA Runbook. *Note: Because of limitation in the Service Manager API, the properties on the SMA Runbook Activity cannot be filtered out based on if they have any Runbook Parameter bound to them (compare to the Orchestrator implementation). Therefore, verify that you pick the correct property on the SMA Runbook Activity when you map your output prompt values.*
☐	Complete the wizard and press **Create** to create the Request Offering

When the Runbook activity status is changed to **In Progress** (also referred to as **Active**) a Runbook will be started in SMA with the configured parameter values. For more detailed log of the status of the Runbook please refer to the action log of the Runbook activity or the event log on the Service Manager server. It is also possible to view the status of the Runbook in WAP by clicking the **View Most Recent Job** task in the Runbook activity form.

Troubleshooting

Cannot find file or assembly "Gridpro.SMA.SCSM" errors

The reason for this error is usually that the assembly file is missing on the Service Manager Server.

☐	Navigate to the Service Manager installation folder (default: C:\Program Files\Microsoft System Center\Service Manager)
☐	Verify that the file Gridpro.SMA.SCSM.dll is present in the folder
☐	If the file is missing, navigate to the SMA for Service Manager installation folder (default: C:\Program Files\Gridpro\SMA for Service Manager)
☐	Copy **Gridpro.SMA.SCSM.dll** to the Service Manager installation folder

Appendix A

Parameter mapping in Runbook activities

The SMA connector supports a large range of different type on parameters. Some of these are currently not supported by SMA for Service Manager in certain scenarios.

The following types are fully supported as Runbook parameters:

- System.String
- System.Boolean
- System.DateTime
- System.Decimal
- System.Double
- System.Int32
- System.Guid

The following types are only partially supported and special consideration has to be made when mapping the parameters to properties on the Activity/Work Item:

- Any array types (types that ends with []). Example: System.String[], String.Boolean[]
- The System.Object type

Array types **must** be entered as JSON arrays to be able to be used in SMA.

Example: ["String1", "String2"] for a System.String[] parameter. ["false", "true"] for a System.Boolean[] parameter.

Object types **must** be entered as JSON objects to be able to be used in SMA.

Example: { "Firstname" : "John", "Lastname" : "Doe" }.

Because of the format rules for parameters of array types or object types, the possibility to bind these parameters to other properties on the Work Item/Activity is severely limited.