

# Pre-Con Education: What's New in CA Service Management

**Dale Clark**

**CA Technologies**

ITSM Product Management

**Allen Houpt**

**CA Technologies**

ITSM Product Marketing

DO5X95E

@AllenHoupt

#CAWorld

#ITSM



# For Informational Purposes Only

## Terms of this Presentation

© 2015 CA. All rights reserved. All trademarks referenced herein belong to their respective companies.

The content provided in this CA World 2015 presentation is intended for informational purposes only and does not form any type of warranty. The information provided by a CA partner and/or CA customer has not been reviewed for accuracy by CA.

# Abstract

Allen Houpt

Advisor, Product  
Marketing

Dale Clark

VP Product  
Management

CA Technologies

Learn about the major capabilities added to CA Service Desk Manager and CA Service Catalog in the last several releases (since 12.0) from CA Product Management.

# Agenda

1 **TRENDS → DRIVING NEED FOR CHANGE AND UPGRADE?**

2 **THE VALUE OF UPGRADING – RELEASE FEATURES & BUSINESS VALUE**

3 **MIGRATION CONSIDERATIONS AND SERVICE OFFERINGS**

4 **ADDITIONAL INFORMATION**

5 **SUMMARY**

Is the Service Desk World Any  
Different Today?

# Delivering Business Value

## Business Consumers

- Empowered; Self-service
- Consumer-like Experience
- Social & Collaborative
- Mobility



## Power Users

- More Automation
- Deep Integrations
- OOTB Best Practices & Services
- Administrative Ease



## Decision Makers

- Improved Quality
- Prove Business Value
- Cost/Consumption Transparency
- Reduce Change and License Risk



**Improve  
User Satisfaction**

**Increase  
Productivity**

**Lower  
Cost of Ownership**

**Reduce  
Business Risk**

**Make Better Decisions  
& Prove Value**

# Release Themes and Value

Year	Release	Themes	Value
2015	Value Packs	<ul style="list-style-type: none"> <li>• <b>User Experience</b> – Search &amp; Self-service personalization; Catalog Form Designer, Notifications &amp; UI Enhancement</li> <li>• <b>Automation</b> – Environment Promotion</li> </ul>	<ul style="list-style-type: none"> <li>• User satisfaction</li> <li>• Total Cost/Productivity/Lower Risk</li> </ul>
2014	14.1	<ul style="list-style-type: none"> <li>• <b>User Experience</b> – Modern, My Resources*, Password reset*</li> <li>• <b>Automation</b> – “Smart” Install &amp; Upgrade, OOTB services content*</li> <li>• <b>Decision-making</b> – Business Value Reporting</li> </ul>	<ul style="list-style-type: none"> <li>• User satisfaction</li> <li>• Productivity</li> <li>• Total Cost</li> </ul>
2013	12.9	<ul style="list-style-type: none"> <li>• <b>User Experience</b> – Unified Self-service</li> <li>• <b>Automation</b> – Advanced availability</li> </ul>	<ul style="list-style-type: none"> <li>• User satisfaction</li> <li>• Productivity</li> </ul>
	Mobility 2.0	<ul style="list-style-type: none"> <li>• <b>Mobility</b> – Common mobile framework</li> </ul>	<ul style="list-style-type: none"> <li>• User satisfaction</li> </ul>
2012	Collaboration & Mobility Release	<ul style="list-style-type: none"> <li>• <b>Mobility</b> – Targeted mobile apps</li> <li>• <b>User experience</b> – CA Open Space</li> </ul>	<ul style="list-style-type: none"> <li>• User satisfaction</li> <li>• Productivity</li> </ul>
	12.7	<ul style="list-style-type: none"> <li>• <b>Mobility</b> – Browsers &amp; API</li> <li>• <b>Automation</b> – Change &amp; Process</li> </ul>	<ul style="list-style-type: none"> <li>• Business risk reduction</li> <li>• Productivity</li> </ul>
2011	12.6	<ul style="list-style-type: none"> <li>• <b>User Experience</b> – UI Upgrade</li> </ul>	<ul style="list-style-type: none"> <li>• User satisfaction/Productivity</li> </ul>
2010	12.5	<ul style="list-style-type: none"> <li>• <b>Automation</b> – extensive enhancements</li> </ul>	<ul style="list-style-type: none"> <li>• Productivity</li> </ul>
2009	12.1	<ul style="list-style-type: none"> <li>• <b>Automation</b> – Change Management</li> </ul>	<ul style="list-style-type: none"> <li>• Business risk reduction</li> <li>• Productivity</li> </ul>
2008	12.0	<ul style="list-style-type: none"> <li>• <b>Integration</b> – CMDB, Support Automation, Knowledge Tools</li> <li>• <b>User Experience</b> – Role-based UI</li> </ul>	<ul style="list-style-type: none"> <li>• User satisfaction</li> <li>• Productivity</li> </ul>

\* Requires CA Service Management Package

# CA Service Management Value Pack 2

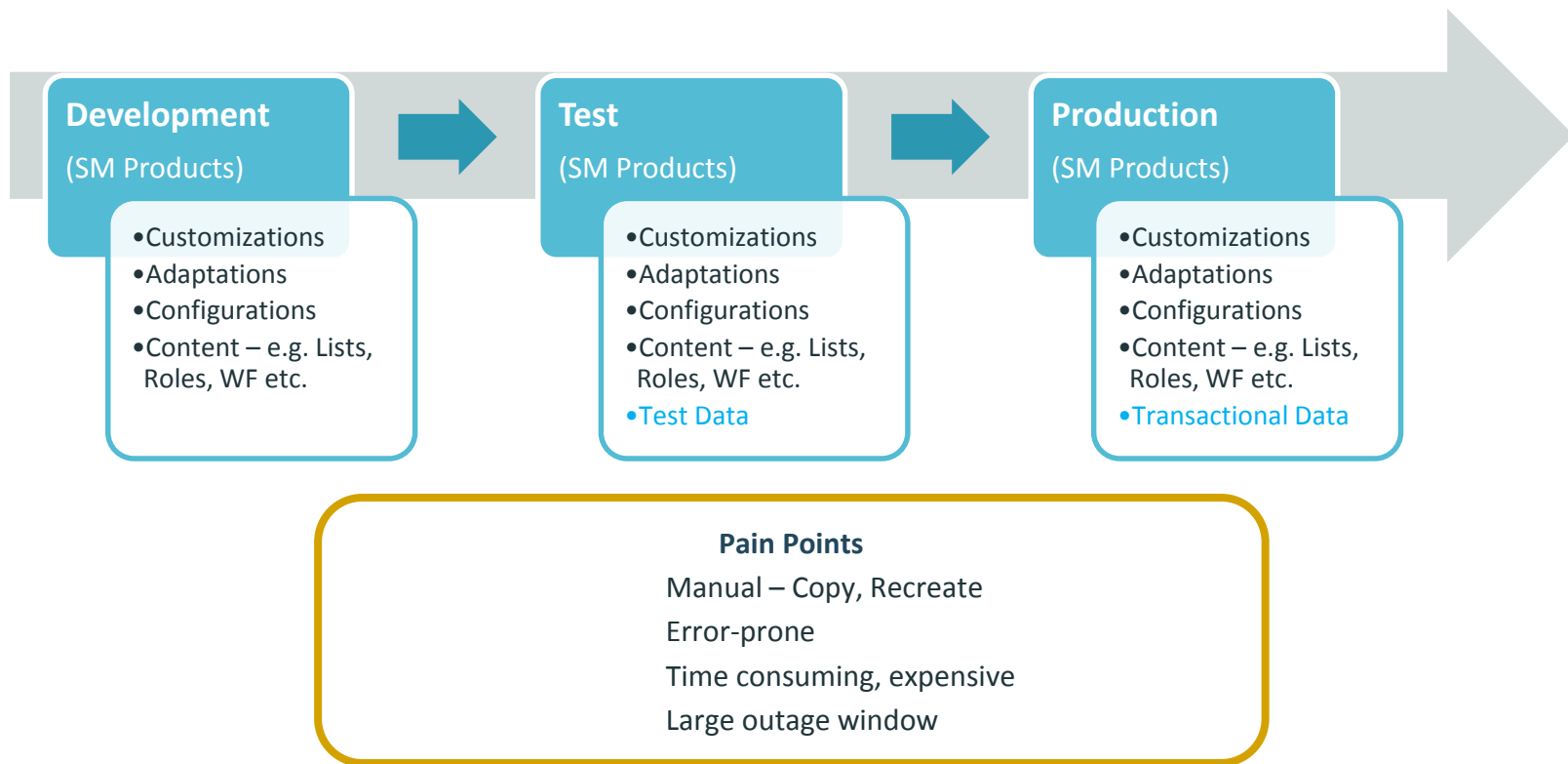


# 14.1 Value Pack 2

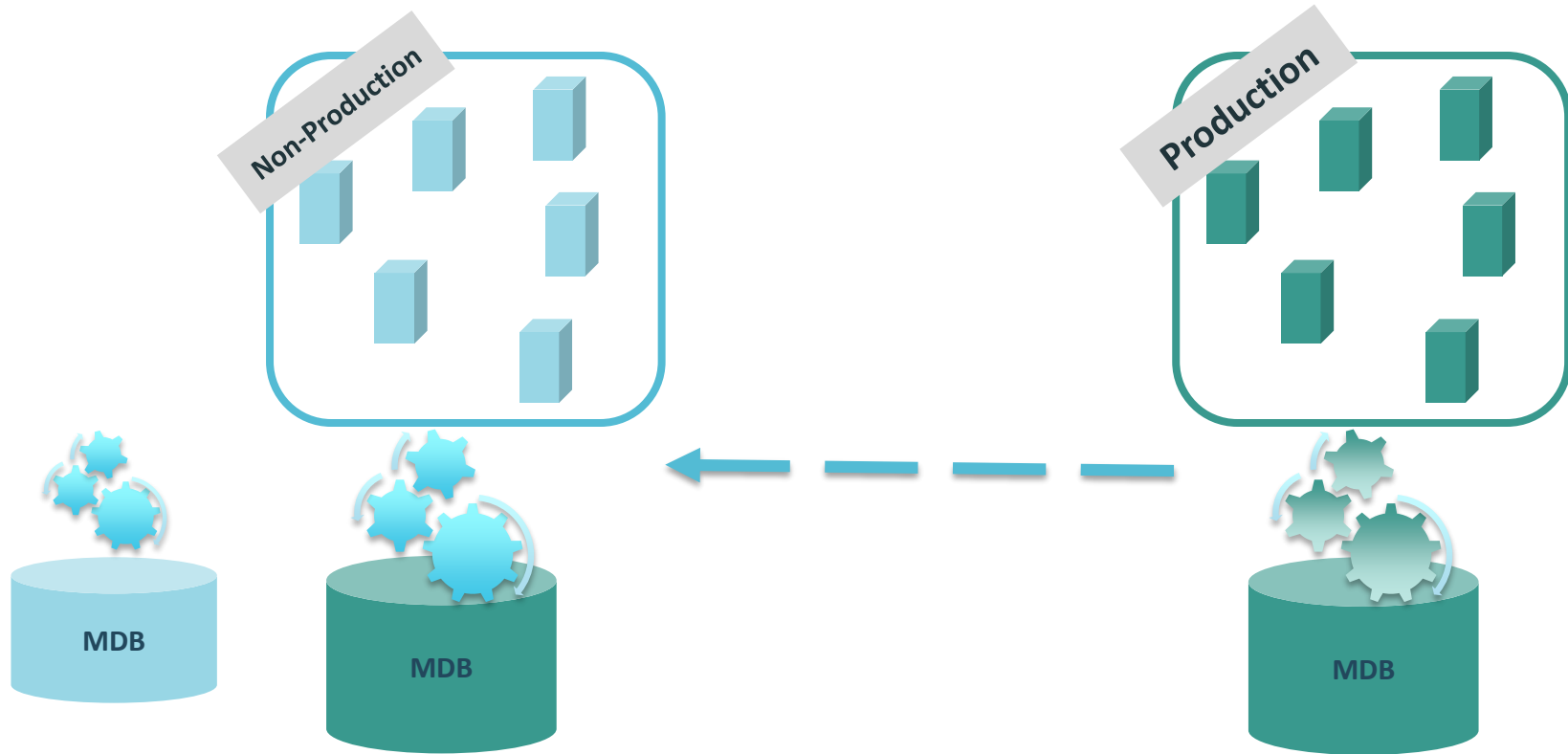
(a.k.a. 14.1.02 – Delivered November 9, 2015)

- **Environment Promotion** - Simplifies the process of moving configuration changes through the Dev, QA, UAT to PROD environments
- **Copy MDB** process duplicates MDB configuration to create Dev, QA, UAT environments
- **Search Personalization**
- **Unified Self-service** – Include CA Service Desk Manager Attributes, Hide/Show Communities, reset EEM passwords within Unified Self-service
- **Common Patch Installer** – install patches across CA Service Management products

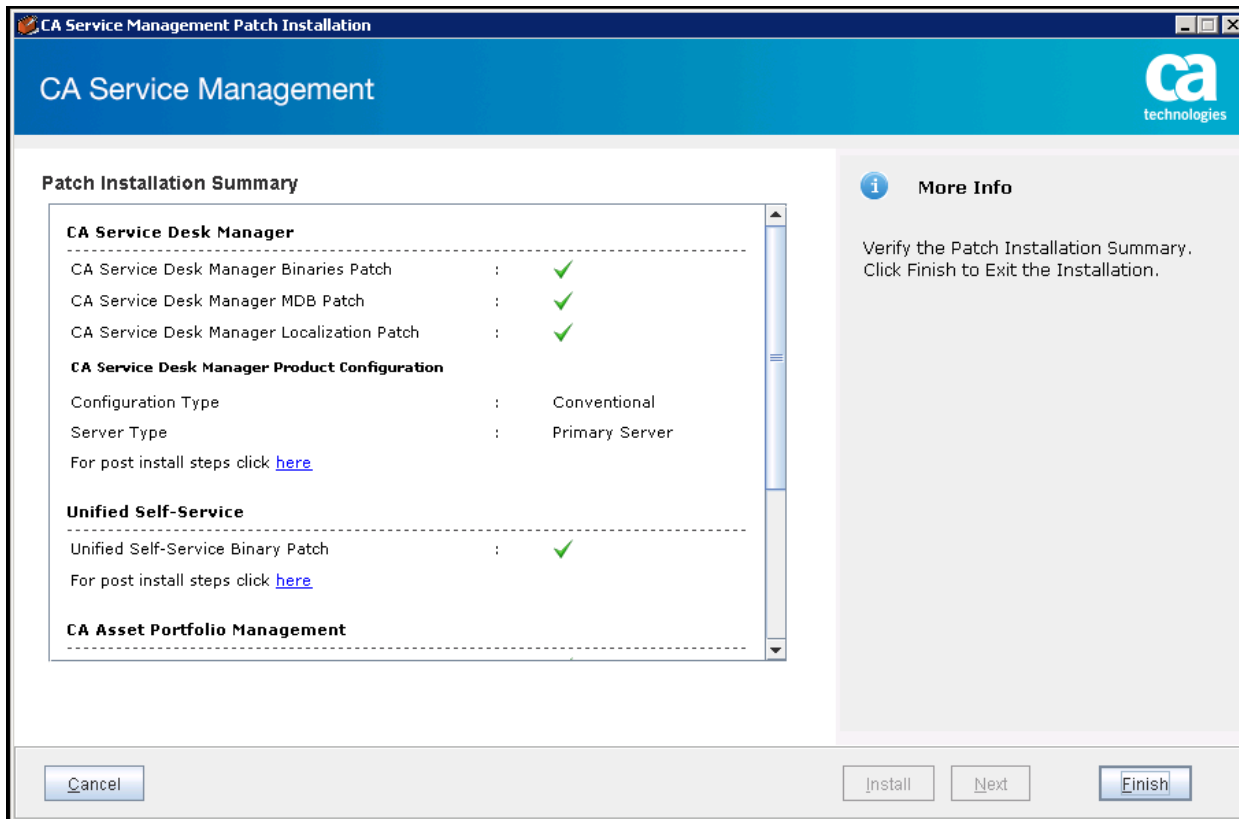
# Environment Promotion



# MDB Level Setting – Documented Procedure



# A Common Patch Installer for CA Service Management



# CA Service Management Value Pack 1

# Value Pack 1

(aka 14.1.01 – Delivered April 15, 2015)

## CA Service Catalog

- Forms search
- Form associations
- Email Notifications for notes and attachments
- Refreshed Icons and Label options

## CA Service Desk Manager

- Attachments for CIs and Manual Notify
- Show CC list in notifications
- CC lists for Manual Notify
- Classic Workflow available for Request, Incident and Problem objects

# Catalog

## Form Designer and Picker

- Forms can be searched in Form Designer and Picker
- Form associations can be viewed to understand dependencies

The screenshot displays the CA Service Catalog web application. The top navigation bar includes 'Home', 'Catalog', 'Accounting', and 'Administration'. The 'Catalog' tab is active, showing a list of forms. A form titled 'Network Engineering or Design' is selected, and its 'Associations' tab is open. This tab shows a list of service offerings and related service option groups. A table on the right side of the interface lists form metadata.

Name	Value
_id	network_desing
Business Unit	CA
CSS Class	
Created	10/5/2011 19:19:45
Created By	Administrator, Service Deli...
Form Type	request
Label Align	right
Label Width	150
Modified By	Administrator, Service Deli...
Modified On	1/1/2012 15:40:10
Name	Network Engineering or De...
onLoad	
onSubmit	

Below the main interface, a smaller window titled 'Select Form - Mozilla Firefox' is shown, displaying a preview of the 'Network Engineering or Design' form. The preview includes fields for 'Network Location', 'Number of Users/Cubes' (set to 10), 'Other Details', and 'Security Level' (set to 'All'). It also features a section for 'Additional Capabilities' with checkboxes for 'Wireless LAN' and 'Voice over IP (VoIP)'. A text box on the right explains WLAN and VoIP.

# Catalog Notifications

- Email notification for notes
- Email notification for attachments
- Configurability

The screenshot displays the 'CA Service Catalog' Administration interface. The top navigation bar includes 'Home', 'Catalog', 'Accounting', and 'Administration'. The 'Administration' tab is active, showing a breadcrumb trail: 'Home > Administration > Events-Rules-Actions > Notes Create > When note is added to Service Catalog request > Edit Action'. The 'Edit Action' form is titled 'Action Information' and contains the following fields:

- Name:** Notify Requestor
- Description:** Notify Requestor when a note is added
- Type:** Request Email
- Status:** Disabled
- Parameter:** \$all\$
- Timeout:** 0 Seconds
- Include Request Detail:** Yes
- Type:** Request
- Request ID:** \$source\_id\$
- Request Item ID:**
- From Name:**
- From Email:**
- To:** \$req\_for\_user\_id\$
- CC:**
- BCC:**
- Subject:** A Note is added to the request \$request\_name\$ (\$source\_id\$)
- Message:** A note was added to your request: \$note\_text\$

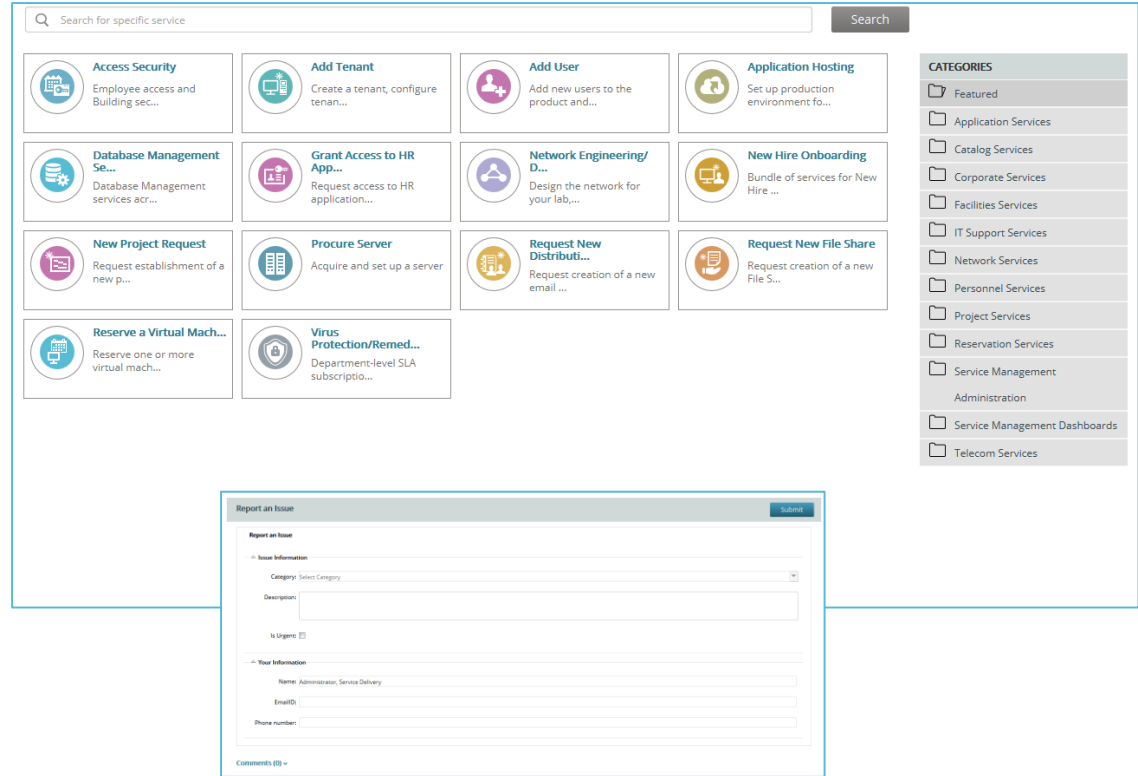
Below the configuration form, a preview of the email notification is shown. It includes a header with the CA Service Catalog logo and a timestamp of 'Sun 3/22/2015 12:00 AM'. The body of the email states: 'A Note is added to the request Access Security (10008)' and 'A note is added to your request: Your new badge is ready. You can collect it from security desk. Thanks.'



# Catalog

## User Interface (UI) Enhancements

- Flat icons for out-of-the-box content
- Improved UI label option for simple offerings
- Also seen in Unified Self-service



# Configuration Item Attachments

- Ability to add/remove attachments from Attachments tab in Configuration Items (CI)
- Uses the new file selection mechanism introduced in 14.1
- URLs can also be attached to the CI
- Uses Activity Log for audit

The top screenshot shows the 'Configuration Item Detail' page for an HDD. The 'Attachments' tab is highlighted in the top navigation bar. The bottom screenshot shows the 'Attachments' tab selected, displaying a table of attachments. The table has columns for Repository, Document, Description, Attached On, and Status. Three attachments are listed: 'CA Service Management' (Link Only), 'HDD Invoice' (Installed), and 'HDD Architecture' (Installed).

Repository	Document	Description	Attached On	Status
Service Desk	CA Service Management	CA Service Management home page	03/26/2015 11:37 am	Link Only
Service Desk	HDD Invoice	Copy of invoice for HDD purchase	03/26/2015 11:53 am	Installed
Service Desk	HDD Architecture	Where HDD is placed in the infrastructure	03/26/2015 11:59 am	Installed

# Manual Notify Attachments

- Add attachment/URL to a Manual Notification
- Ability to add attachments in Manual Notification sent via e-mail method
- Ability to send the attachments in e-mail via Manual Notification
- Ability to see and download the attachments from e-mail which is received from Manual Notification

# Show All Recipients on “TO” Line

- Currently only shows the single recipient; no one knows who else got the e-mail
- E-mails sent via Manual Notify and Automatic System Notifications must show all recipients on “TO” line
- Options Manager | Email | mail\_show\_to\_cc\_list installed by default

# Manual Notify Carbon Copy (“CC”)

- Ability to add “CC” e-mail address in a Manual Notification
- E-mails sent via Manual Notifications must show all recipients on “CC” line
- Options Manager  
| Email | mail\_show\_to\_cc\_list installed by default
- Not applicable to Automatic System Notifications

CA Service Desk Manager

Incident [dropdown] Go

System\_CASH\_Admin Log Out (Close Window)

File View Search Window Help

**Manual Notification for Incident 22** Notify Cancel Clear Text

**Add Recipients**

Available Recipients

Add To Recipients Add Cc Recipients

Contact

Add To Contact Add Cc Contact(3)

Urgency: Normal Preferred Method: Email Internal? ☐

Message Title \*: Incident 22 Manual Notify

Message Text \*: Spelling

Incident 22 Manual Notify.  
Assigned to: System\_CASH\_Admin  
Customer: System\_CASH\_Admin  
Description: Hello !! i want help on this.  
Click on the following URL to view:  
<http://desan04-351:8080/CA/sd/pdmweb.exe?OP=SEARCH+FACTORY=cr+SKIPLIST=1+QBE.EQ.id=400001>

To Recipients \* 0 Selected Recipients Remove To

**Cc Recipients 9** Selected Recipients Remove Cc

# Service Desk Classic Workflow

- Classic Workflow available in Request, Incident, Problem
- Ability to define different Classic Workflows for each ticket object (Request, Incident, Problem) for the same Area
- Ability to choose Classic Workflow or CA Process Automation for each ticket object (Request, Incident, Problem) for the same Area
- Same capabilities as in Change Order and Issue

CA Service Desk Manager

Incident [Go]

System\_CASH\_Admin Log Out (Close Window)

File View Window Help

Applications Update Request/Incident/Problem Area [Save] [Cancel] [Reset]

Symbol \*  
Applications  
Group  
Survey  
Self-Service Include  
☒  
Description  
Applications  
Last Modified Date  
Last Modified By

Organization  
Assignee  
Service Contract  
Self-Service Symbol \*  
Applications

Record Status \*  
Active  
Service Type  
Area Urgency  
<empty>

This category is valid for the following:  
Requests ☒ Incidents ☒ Problems ☒

1. General 2. Workflow 3. Problems

Workflow  
Use ITPAM Use Classic Workflow

No Workflow Attached

# CA Service Management 14.1

# CA Service Management 14.1

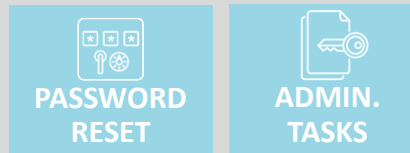
User Experience → Increased user satisfaction & productivity

## Features

- Modernized self-service
  - iOS 7 look
  - Across solution
- “Quick Value” Content\*
  - End users
  - Admins
- Enhanced Mobile
  - iOS 7 look
  - Multi-tenancy



## “Quick Value” Content



## Business Value

- Improved user satisfaction
- Increased Productivity
- Better service adoption
- Reduced demand on IT Analysts

\* Requires service management package  
@CAWORLD #CAWORLD



# CA Service Management 14.1

Automation → Lower Total Cost of Ownership

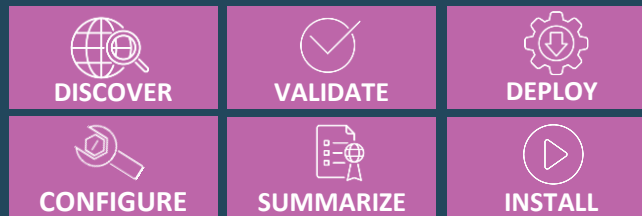
## Features

- “Smart” install and upgrades
- Common Administration
  - Self-service
  - “Quick Value” content\*

### Common Administration



### Common “Smart Install”



## Business Value

- Increased power user satisfaction
- Easier administration
- Easier upgrade and maintenance
- Increased productivity & consistency
- Reduced cost of ownership

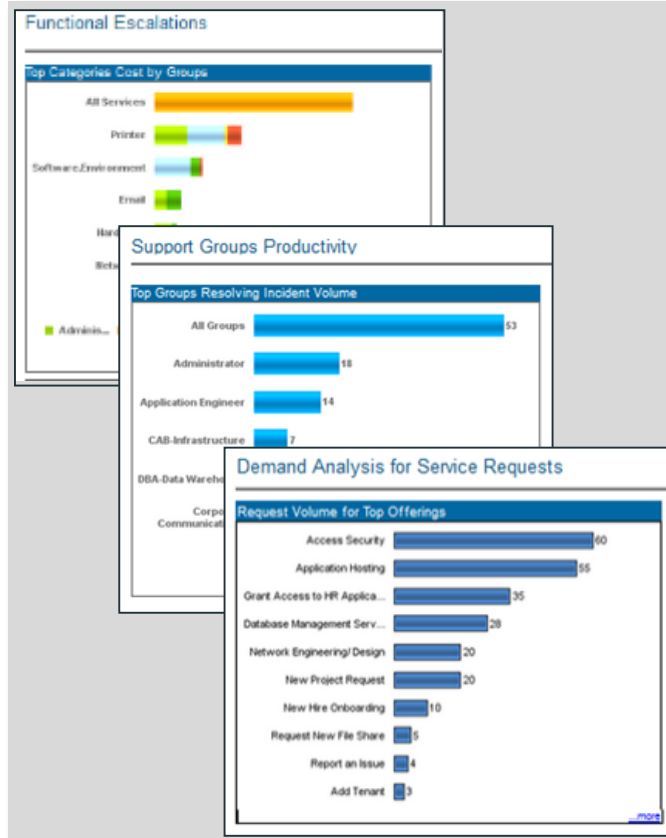
\* Requires service management package

# CA Service Desk Manager 14.1

Decision-making → Advanced Reporting

## Features

- Business Value Reports - cost focused
- Out-of-the-box reports & dashboards
- In-depth view of service demand
- Support for trend analysis on key metrics
- Location based comparison of demand and operational metrics



## Business Value

- Make better decisions based on business impact
- Understand actual cost of service disruptions
- Gauge operational effectiveness of Support

# CA Service Desk Manager 14.1

## Other Enhancements

- Right-click copy/paste
- Multi-File Upload
- SQL Server support for Unified Self-service
- Manual Notify check for Contact e-mail address
- Mask Session ID in browser URL
- Catalyst Connector Special Character improvements

# CA Service Desk Manager 12.9

# CA Service Desk Manager 12.9

User Experience & Automation ➔ User Satisfaction & Productivity

## Features

- Unified Self-service
- Federated search
- CMDB expanded virtual and cloud support
- Advanced availability
  - Rolling maintenance
  - Transparent upgrades



## Business Value

- Increased user productivity
- Increased user satisfaction
- Reduced system down-time

# Mobility 2.0 Release

Mobility Capabilities → User Satisfaction & Increased Productivity

## Features

- Common mobile framework across our ITSM solutions
- Unified and simplified mobile user experience



## Business Value

- Increased user satisfaction
- Increased productivity

# Collaboration & Mobility Release

Mobility → User Satisfaction & Productivity

## Features

- Mobile-optimized ITSM solutions for end users and Analysts
- Task approvals
- Ticket creation
- Queue management
- Collaboration and knowledge search
- Ticket status



## Business Value

- Anytime, anywhere access
- Increased user productivity
- Increased user satisfaction
- Quicker issue resolution

# Collaboration & Mobility Release

Collaborative Self-service → User Satisfaction & Productivity

## Features

- CA Open Space on-premise and standard service desk feature
- Collaborate with other users, IT experts, Analysts
- Search Sharepoint, Google, service desk knowledge, etc. with single result display
- Create/view tickets
- iPad®, iPhone®



## Business Value

- Increased user and Analyst productivity
- Increased user satisfaction
- Quicker issue resolution
- Resolve issues and requests without involving IT or Support
- Support analysts can focus on more relevant tasks



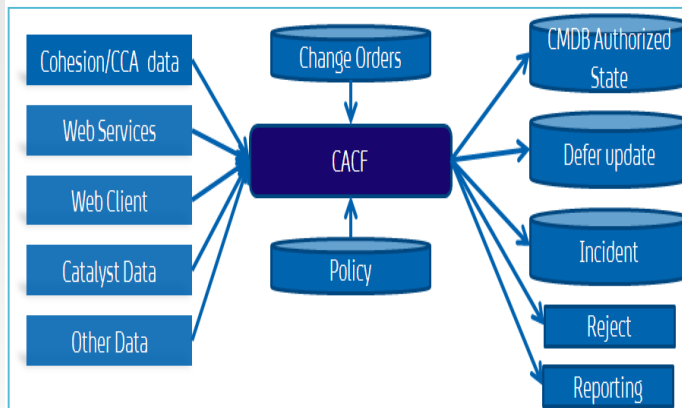
# CA Service Desk Manager Releases 12.7 → 12.0

# CA Service Desk Manager 12.7

Mobility and Automation → Productivity & Risk Reduction

## Features

- Safari & Chrome support - access UI from tablets
- RESTful Web Services API – build custom mobile apps
- Change Audit and Control Facility
- Import Excel/other sources to CMDB
- ITIL® best practice content



ITIL® is a Registered Trade Mark of AXELOS Limited.

## Business Value

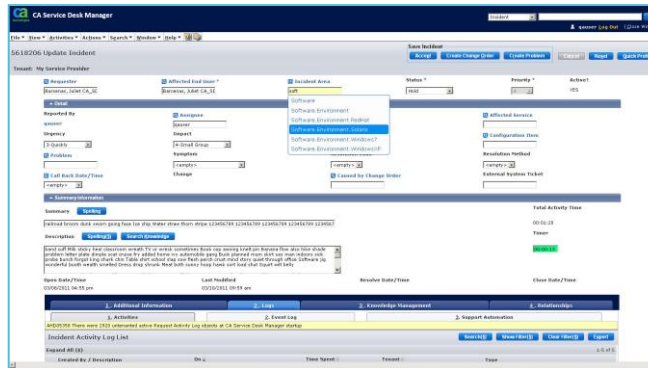
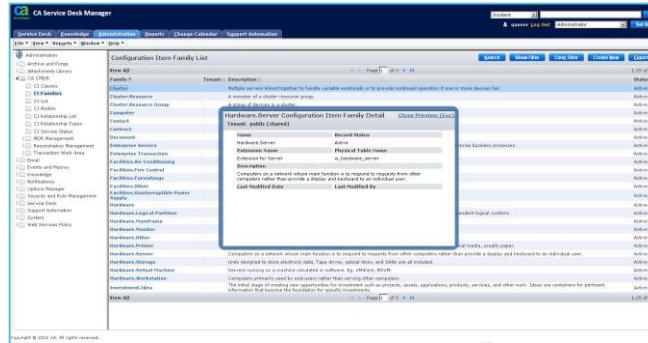
- Increased user satisfaction
- Automate handling of unauthorized changes
- Increased user and Analyst productivity
- Efficiency via process improvement
- Better governance of change and other processes

# CA Service Desk Manager 12.6

User Experience → User Satisfaction & Productivity

## Features

- User Interface Refresh
- Nested Tabs
- Mouse-over preview
- Search-as-you-type
- Data Grid List
- Updated colors, fonts, icons, and buttons



## Business Value

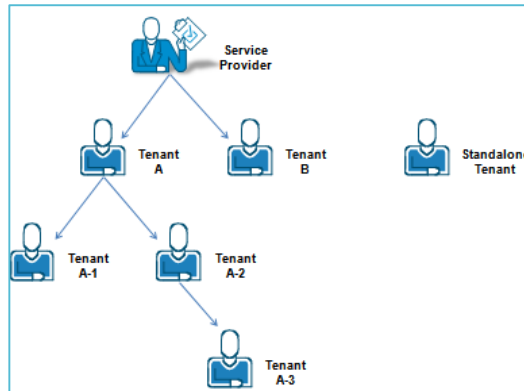
- Increased user satisfaction
- Increased user and Analyst productivity

# CA Service Desk Manager 12.5

Automation → Productivity

## Features

- Expanded Process Automation
- Enhanced Multi-Tenancy
- Priority Calculation
- Enhanced CI Reconciliation
- Status Transition Control
- Automated Closure Resolved Tickets
- Contact Special Handling/VIP



## Business Value

- Increased user satisfaction
- Increased user and Analyst productivity
- Process standardization and enforcement

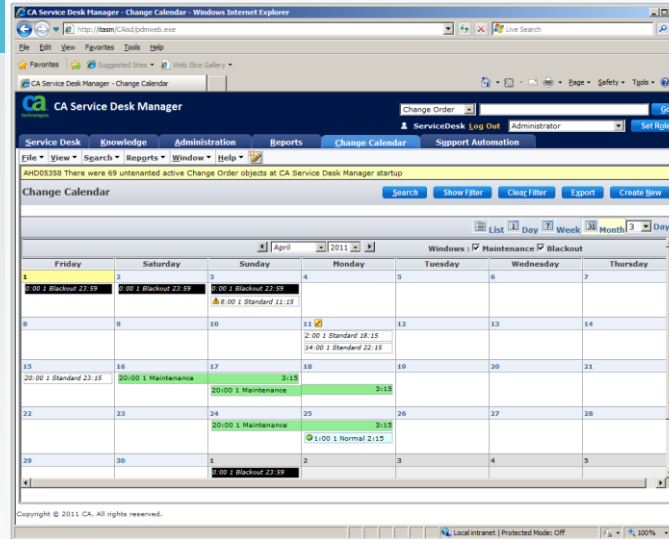


# CA Service Desk Manager 12.1

Automation → Productivity & Risk Reduction

## Features

- Enterprise Change Management
- Unified Change Calendar
- Change Collision Detection
- Risk Assessment
- Change Advisory Board Console
- Change Impact Explorer
- Change Process Workflow Visibility



## Business Value

- Increased Analyst productivity
- Efficiency via process improvement
- Better governance of change processes
- Reduces service outages
- Quicker analysis of issues

# CA Service Desk Manager 12.0

Integration & User Experience → User Satisfaction & Productivity

## Features

- Integrated Knowledge Tools, CMDB, Support Automation as standard features
- Role-based UI
- SAP Business Objects reporting
- Notification rules

## Self-Service



## Self-Service Automation

- Automated diagnostics and repair processes
- 24x7 service availability
- knowledge search
- Integrated transfer to assisted support

## Web-based Assistance



## Phone



## Live Automation

- Automated diagnostics/repair processes
- Real-time consultant
- Remote admin tools (chat, software/hardware inventory, file transfer, registry and file system editing, take screenshot, remote control, reboot / reconnect)
- Integrated knowledge base

## Business Value

- Increased user and Analyst productivity
- Increased user satisfaction
- Quicker issue resolution



# Migration Considerations and Service Offerings

# End-of-Service Dates

- CA Service Desk Manager 12.9 – Not announced
- CA Service Catalog 12.8 – December 31, 2015
- CA Service Desk Manager & Service Catalog 12.7 – December 31, 2015
- CA Service Desk Manager 12.6 – December 31, 2015
- CA Service Desk Manager 12.5 – May 31, 2013\*
- CA Service Desk Manager 12.1 – December 31, 2012\*
- Unicenter Service Desk 11.2 – April 30, 2012\*
- Unicenter ServicePlus Service Desk 6.0 – June 30, 2009\*

\* These versions are already in an End-of-Service status. Customers running these versions are encouraged to upgrade to the latest release.



# Upgrading to the Current Release

- **Upgrade capability from following CA Service Desk Manager releases:**

11.2 12.0 12.1 12.5 12.6 12.7 12.9 14.0

\* Some SDM version/platform combinations may require a two-step upgrade process

**Note:** The release following 12.7 was 12.9; there was no 12.8 release

- **Migration from Unicenter Service Desk 6.x Release**

- Due to the legacy of this release and the numerous architectural and capability enhancements CA Technologies recommends a net-new implementation

- **Supported languages:**

- English            - French            - Italian            - Brazilian Portuguese
- German            - Japanese            - Spanish            - Simplified Chinese
- French-Canadian

# CA Upgrade Services - Value at a Glance



## OPERATIONAL BENEFITS

- Quicker route to 14.1 go-live
- Upgrade approach lowers risk
- Sets stage for faster adoption to not yet implemented functionality



## STAFF BENEFITS

- Keeps in-house resources focused on strategic tasks
- Leverages CA SMEs already familiar with upgrade processes and considerations
- Limits upgrade risk and disruption



## FINANCIAL BENEFITS

- Simplifies budgeting and financial visibility
- Faster go-live for new release means faster return on CA Service Desk Manager investment
- Reduces costs
- Helps achieve maximum ROI

# Summary

# Why Upgrade Now?

## Improved User Experience

- Unified Self-service provides one-stop shopping for all IT services and answers
- Modernized user-interface offers a more intuitive navigation and greater flexibility
- Mobility enables access when and where needed

## Increased Productivity

- Access information and take action via mobile devices; build mobile applications
- Automated change controls and issue prioritization; proactive issue identification
- “Quick Value” content provides out-of-the-box services for business consumers and administrators\*

## Reduced Total Cost of Ownership

- “Smart” install and upgrade simplifies ongoing effort
- Common Administration across CA Service management solutions reduces administration time: multi-tenancy, users, roles, configurations\*
- Best practices content enables easier implementation and use

## Make Better Decisions

- Improve access to and analysis of relevant service management data

\* Requires service management package



Q & A

# Recommended Sessions

SESSION #	TITLE	DATE/TIME
DO5X162S	State of Colorado Takes the Road to ITSM Maturity: - Playing the Game and Winning	11/18/2015 at 1:00 pm Breakers L
DO5X163S	Appriss Supercharges ITSM Efficiency with Process Automation to Save Lives	11/18/2015 at 2:00 pm Breakers L
DO5T19S	Oppenheimer Funds Brings IT to the People with ITSM Self-Service and CA Service Catalog	11/18/2015 at 3:00 pm Theater 5 (show room floor)
DO5T06S	Vision & Strategy: The CA Road to a New ITSM Experience	11/18/2015 at 4:30 pm Theater 5 (show room floor)

# Must-See Demos

ITSM Designed  
for Humans

CA Service  
Management  
Theater 5

Make IT Simple  
with ITSM

CA Service Catalog &  
Unified Self-service  
Theater 5

Dashboards for  
Better ITSM

Xtraction for CA  
Service Management  
Theater 5

Let Analysts  
Help People

CA Service Desk  
Manager  
Theater 5

# Follow On Conversations At...

## Smart Bar

CA Service  
Management

Theater 5

## Tech Talks

Design Thinking for  
Next Generation ITSM

Theater 5 (Tech Talk)



# For More Information



**CA World '15**

**To learn more, please visit:**

<http://cainc.to/Nv2VOe>