



# SCUtils SmartAssign Guide

Solution for Microsoft System Center 2012 Service Manager

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**Feedback:**

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# 1. Getting started

SCUtils SmartAssign is an extension for Microsoft System Center 2012 Service Manager that makes possible to assign IT analysts based on their workload, competence, SLO metrics for currently active tickets, and membership in the support groups.

The task is available for the following work items and their derivatives:

- Incidents
- Service Requests
- Problems
- Change Requests
- Release Records
- Manual Activities

## 1.1 Compatibility

SCUtils SmartAssign was designed and tested for the following versions of Microsoft System Center 2012 Service Manager:

- Microsoft System Center 2012 Service Manager;
- Microsoft System Center 2012 Service Manager SP1;
- Microsoft System Center 2012 Service Manager R2.

## 1.2 Try before buy

SCUtils SmartAssign has a unified installer for a trial and full versions and can be obtained on <http://www.scutils.com> on the Download page. We highly recommend to evaluate the software in a testing lab before the implementing in the production environment.

The free 15-day trial version is fully functional and offers every feature of the product. Please become familiar with this guide before starting using SCUtils SmartAssign and do not hesitate to contact us at [support@scutils.com](mailto:support@scutils.com). You are also more than welcome to our [YouTube channel](#) where you will find video tutorials for SCUtils SmartAssign and other our products.

## 1.3 Feedback

Our team is always on the way of the improvement of our solutions. We highly appreciate every feedback from our customers. Please send us your thoughts, complains, and feature requests at [support@scutils.com](mailto:support@scutils.com).

## 2 Requirements

SCUtils SmartAssign doesn't support the use of Active Directory Primary Group. The default Active Directory Primary Group is Domain Users. It's considered as true that the IT support staff doesn't include all domain users.

### 3 Installation

Download the installation package **SCUtils SmartAssign Setup.msi** from Download page of [www.scutils.com](http://www.scutils.com). Copy the installation package to the Service Manager management server (this is usually the first installed server).

**Close (!) all instances of the Service Manager console opened on this server.**

Run **SCUtils SmartAssign Setup.msi** file on the server.

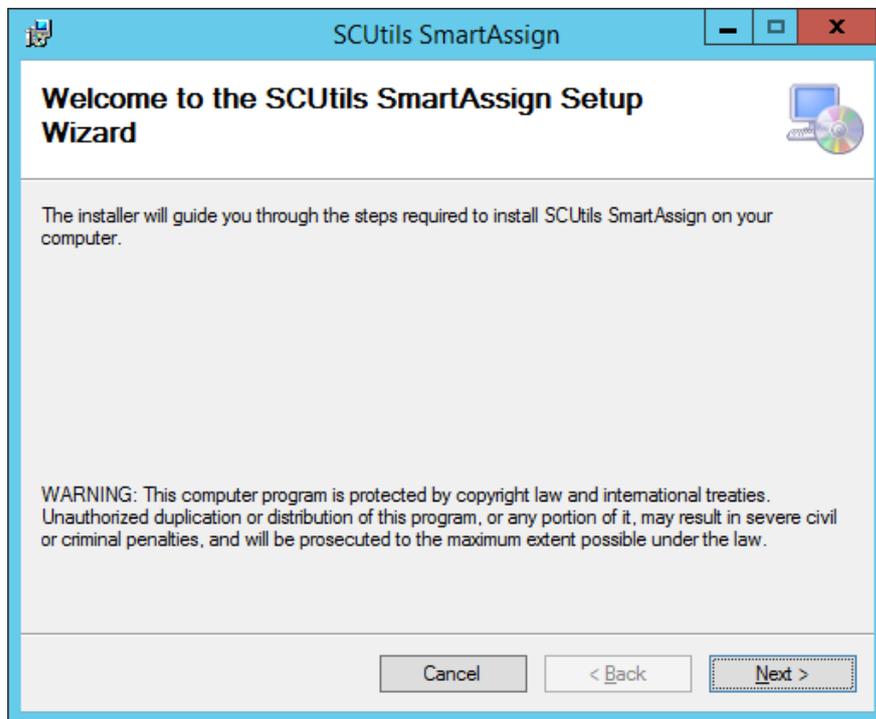


Fig.1 Installing

Follow the installation wizard's steps (Fig.1). On the **Select Installation Folder** page you can change the location on which **SCUtils SmartAssign** will be installed.

After the successful setup close the installation wizard.

After the initial installation you have to activate your copy of the software. There are two ways to activate the product: online (recommended) and offline.

#### 3.1 Online activation

Run the Service Manager console under an administrative account on the computer connected to internet. Open **SmartAssign Settings** to activate the copy of the product:

1. In the Service Manager console, select **Administration**.
2. In the **Administration** pane, expand **Administration**.
3. In the **Administration** view, in the **Settings** area, click **SCUtils SmartAssign Settings**.
4. In the **Tasks** pane, under **SCUtils SmartAssign Settings**, click **Properties**.
5. **SCUtils SmartAssign Settings** window will be opened (Fig. 2).

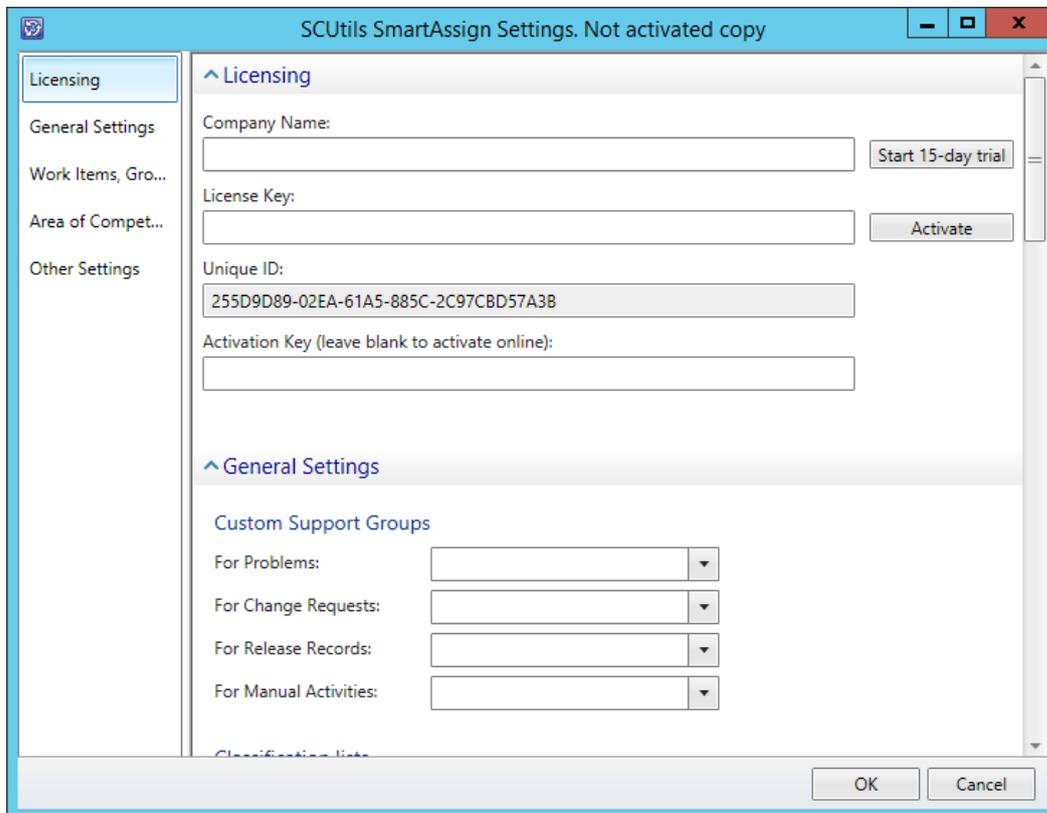


Fig. 2 SmartAssign Settings

If you want to evaluate the product, click on **Start 15-day trial** button.

If you want to activate a full version, fill **Company Name** and **License Key** (exactly as in the license), then click on **Activate** button. After the successful activation, the **License** page in the **SCUtils SmartAssign Setting** window will not appear again.

If you have any issues with the activation process, please send your **Unique ID** at [support@scutils.com](mailto:support@scutils.com) and we will provide you with the offline **Activation Key**.

## 3.2 Offline activation

If you prefer to activate offline or for some reasons you are not able to use the online activation, then send your **Unique ID** at [support@scutils.com](mailto:support@scutils.com) and note what activation type you need (trial or full) and we will provide you with offline **Activation Key**.

After you receive the Activation Key, fill out **Company Name**, **License Key**, and **Activation Key**, then click on **Activate** button.

## 4 Security rights

The Service Manager administrator has to grant users with the permissions to modify incidents, service requests, problems, change requests, release records, and manual activity to allow using SCUtils SmartAssign with the corresponding types of the work items.

Please refer to p. **Managing User Roles in System Center 2012 - Service Manager** of the official guide “Administrators Guide for System Center 2012 - Service Manager” or [Microsoft TechNet Library](#).

## 5 Configuration

Before the first use you have to revise and configure settings of **SCUtils SmartAssign**.

To edit Settings:

1. In the Service Manager console, click **Administration**.
2. In the **Administration** pane, expand **Administration**, and then click **Settings**.
3. In the Settings pane, select **SCUtils SmartAssign Settings**.
4. In the **Tasks** pane, under **SCUtils SmartAssign Settings**, click **Properties**.

### 5.1 General Settings

On the **General Settings** page of the wizard you will find the predefined settings that you can change if required.

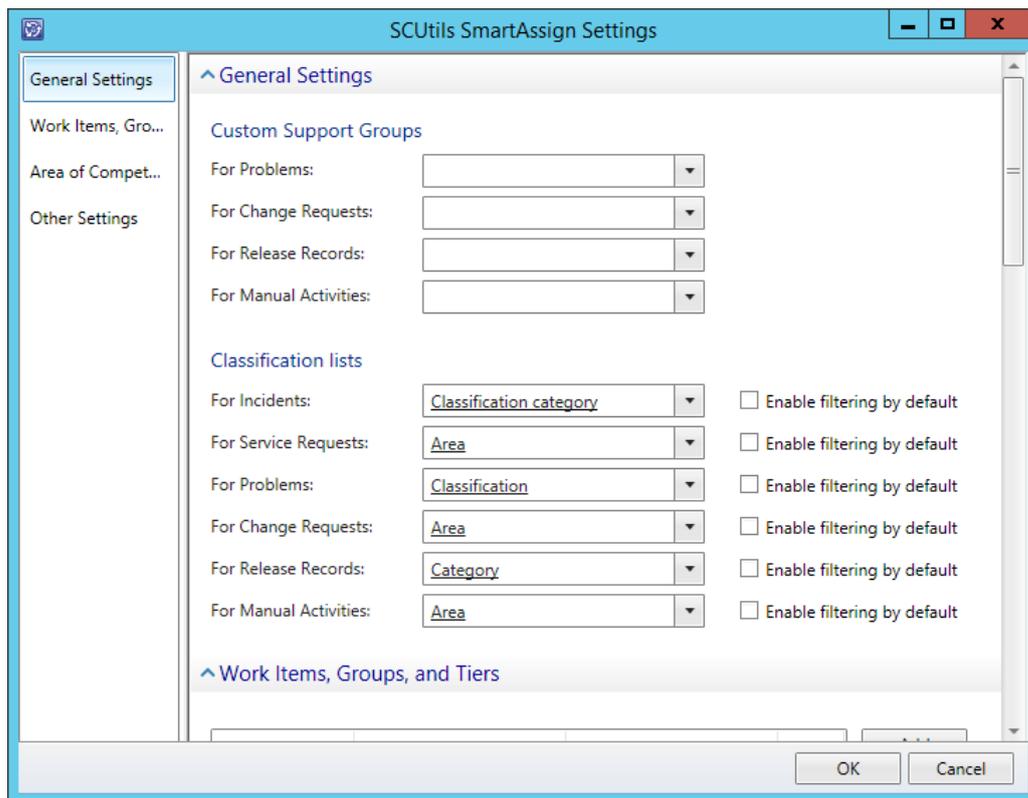


Fig. 3 General Setting

If you use custom support groups for the work items that don't have the support groups by default, you have to select the property that contains the support group's enumerator.

If you use a custom classification/area list (often for Service Requests) you also have to set the proper property with the custom enumerator.

You can also switch on/off the default filtering by the classification/area in the task's form.

### 5.2 Work Items, Groups, and Tiers

On the **Work Items, Groups, and Tiers** page of the wizard you define the work item type, Service Manager group, and appropriate support group (if applicable) for each their combination.

First, you have to create groups in the Service Manager console for each existing support group. Please refer to p. **How to Create a Group** of the official guide "Administrators Guide for System Center 2012 - Service Manager" or [Microsoft TechNet Library](#).

To the groups you have to add the following types of the configuration items:

- Active Directory Group
- Active Directory User
- Active Directory User or Group
- Domain User or Group

In general, you can add other types of the configuration items, but they will be ignored.

There are two main approaches in the creating of the groups. The first one is to create a group that consists of a single (maybe a few) configuration item of the Active Directory Group type. The membership of the corresponding Active Directory Group is defined in your company's Active Directory and the Service Manager administrators don't control it. The second approach is to create the Service Manager group that includes the configuration items of the Active Directory User type. The membership of that group is entirely controlled by the Service Manager administrators. You can also combine both approaches based on your own requirements and experience.

Please make sure that the every created group can be enumerated. To do that, select the group and click on **View Group Members** task in the **Service Manager console -> Library -> Groups**.

After you create the required Service Manager groups, you will be able to add them on the **Work Items, Groups, and Tiers** page.

To do it, click on **Add** button on the wizard page.

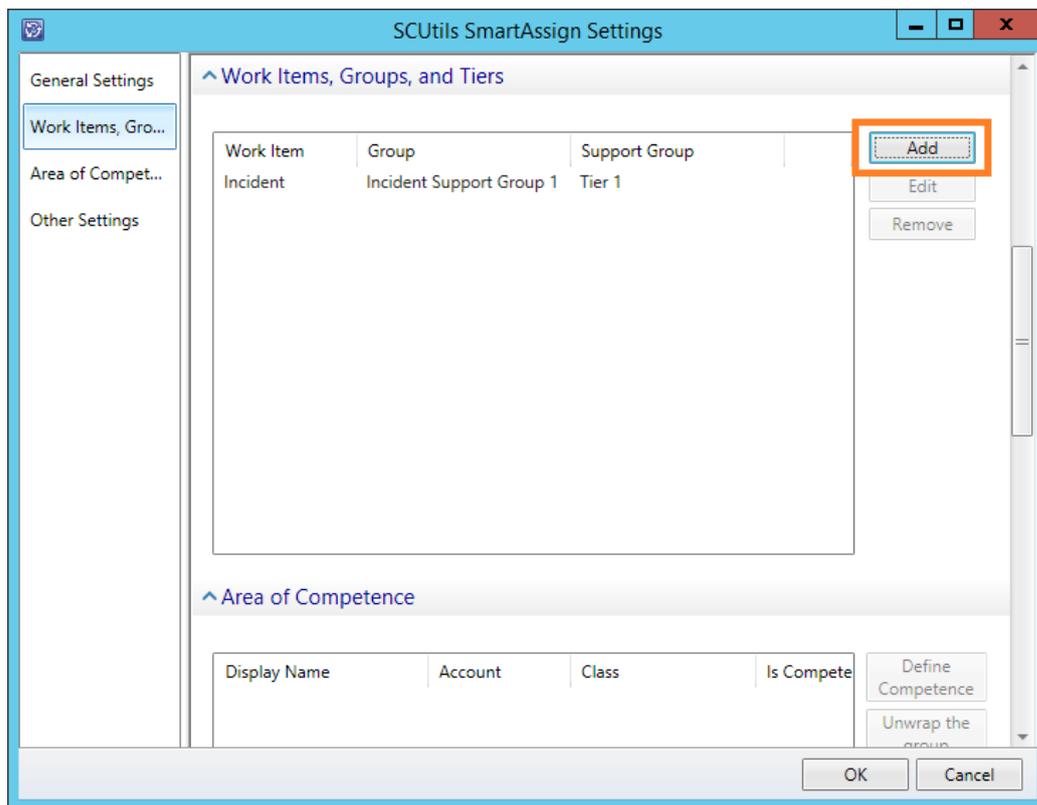


Fig. 4 Work Items, Groups, and Tiers

In the opened form select the proper values and click OK. If the work item doesn't have a support group, the Support Group's selector will be disabled. If your support groups for different types of the work items (e.g. for Incidents and Service Requests) consist of the same staff, you can share the same Service Manager group for each of them.

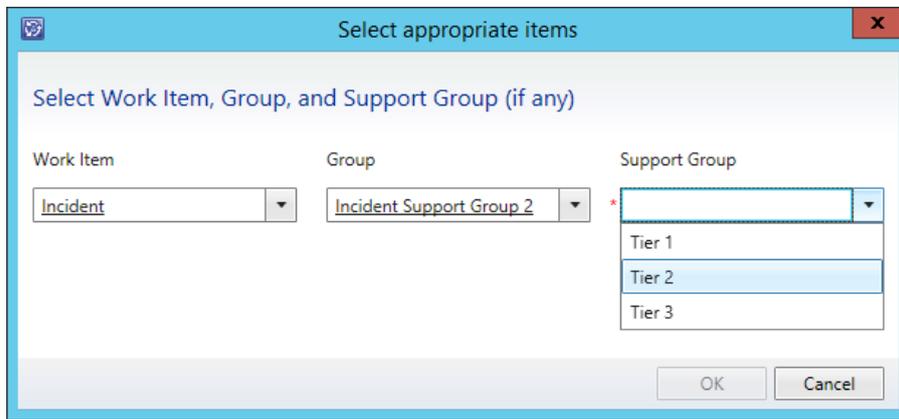


Fig. 5 Linking work item's type, Service Manager group, and Support Group

### 5.3 Area of Competence

After you finish defining the appropriate work item types, Service Manager groups, and support groups, on the **Area of Competence** page you can define what competence each support group's participant has.

First populate the list by clicking on **Populate the list** button.

Before **Populate the list** action please make sure that the every Service Manager group used on the **Work Items, Groups, and Tiers** page has been already enumerated by the Service Manager default workflow. To do that select the every defined group (in the **Service Manager console -> Library -> Groups**), click on **View Group Members** task and make sure that all group's members are listed.

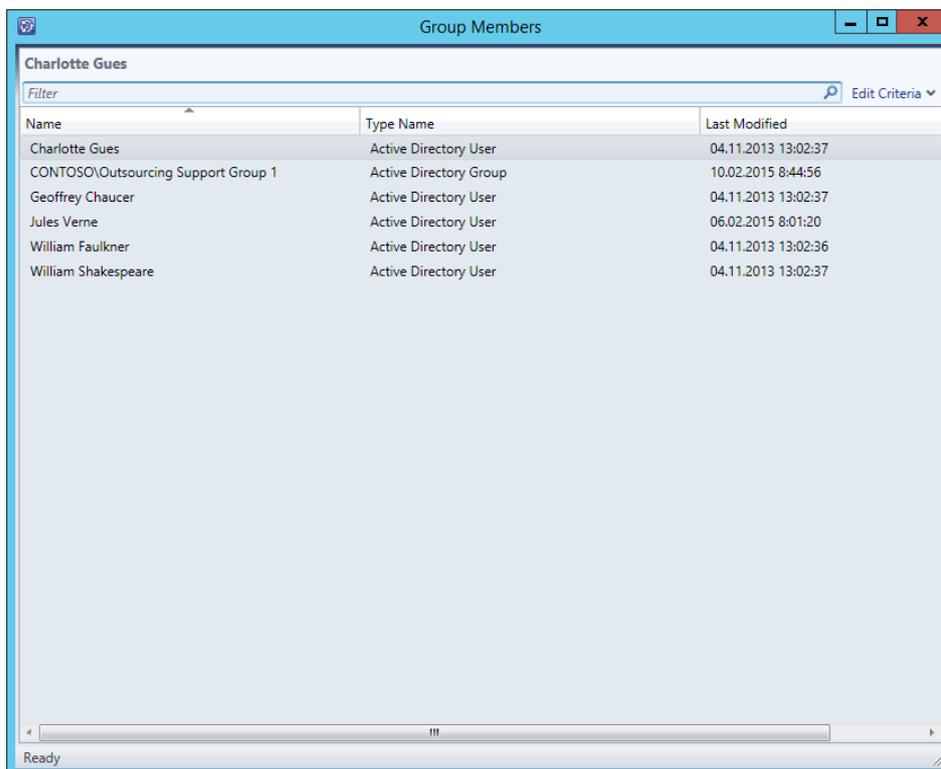


Fig. 6 Enumerated group members

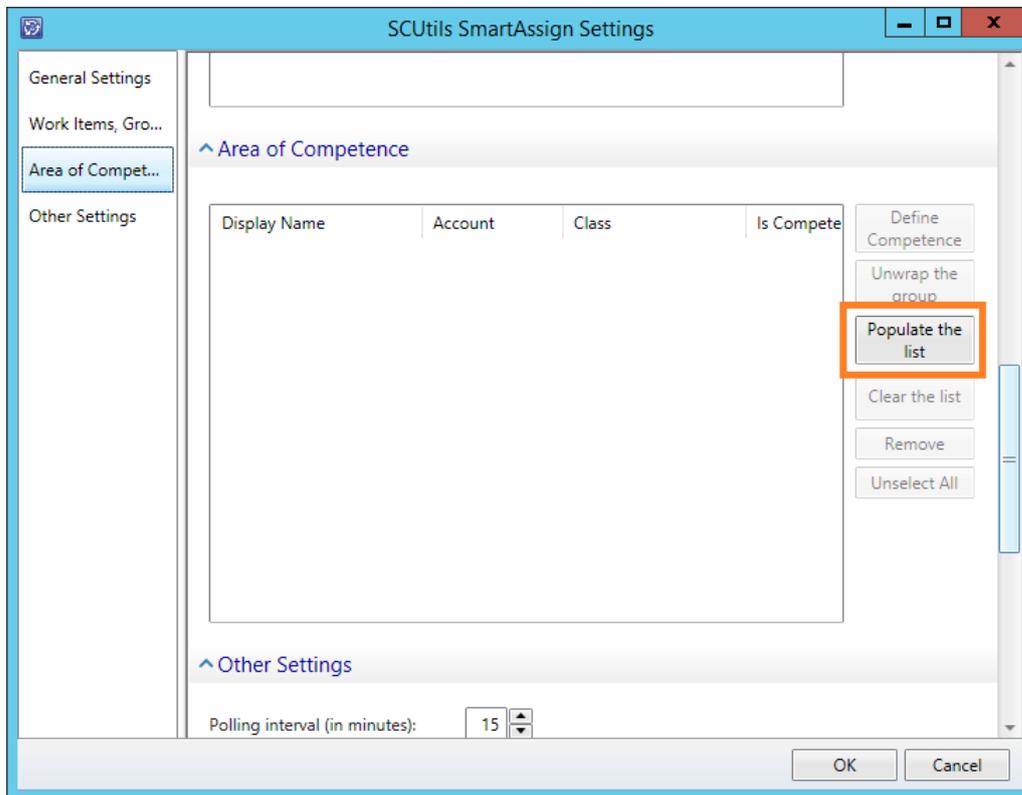


Fig. 7 Populating the list to start defining the competence

The list will be populated with the members of the Service Manager groups.

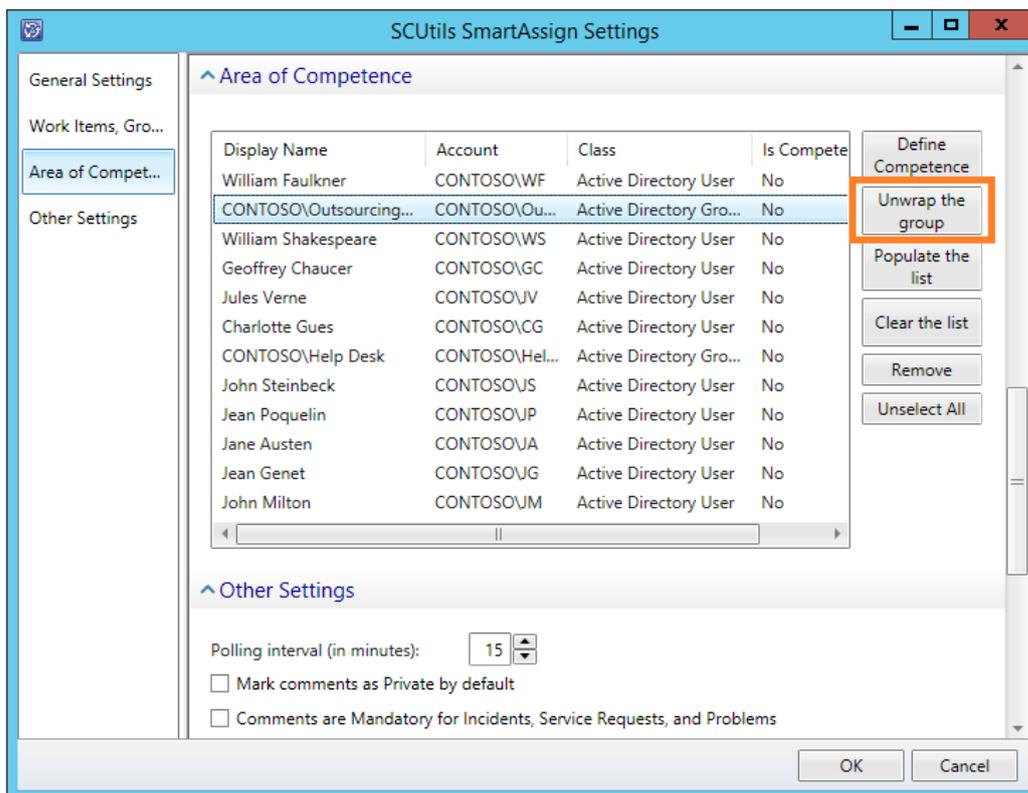


Fig. 8 Unwrapping the group

If there is Active Directory Group in the list, you can unwrap the Active Directory group's membership using **Unwrap the group** button.

To define the competence select the required users and/or group and click on **Define Competence** button.

You can select multiple users and groups to define the competence in bulk. If the selected items have the same set of the checked enumerators, you will be able to edit those enumerators simultaneously. Otherwise you will start with an empty tree.

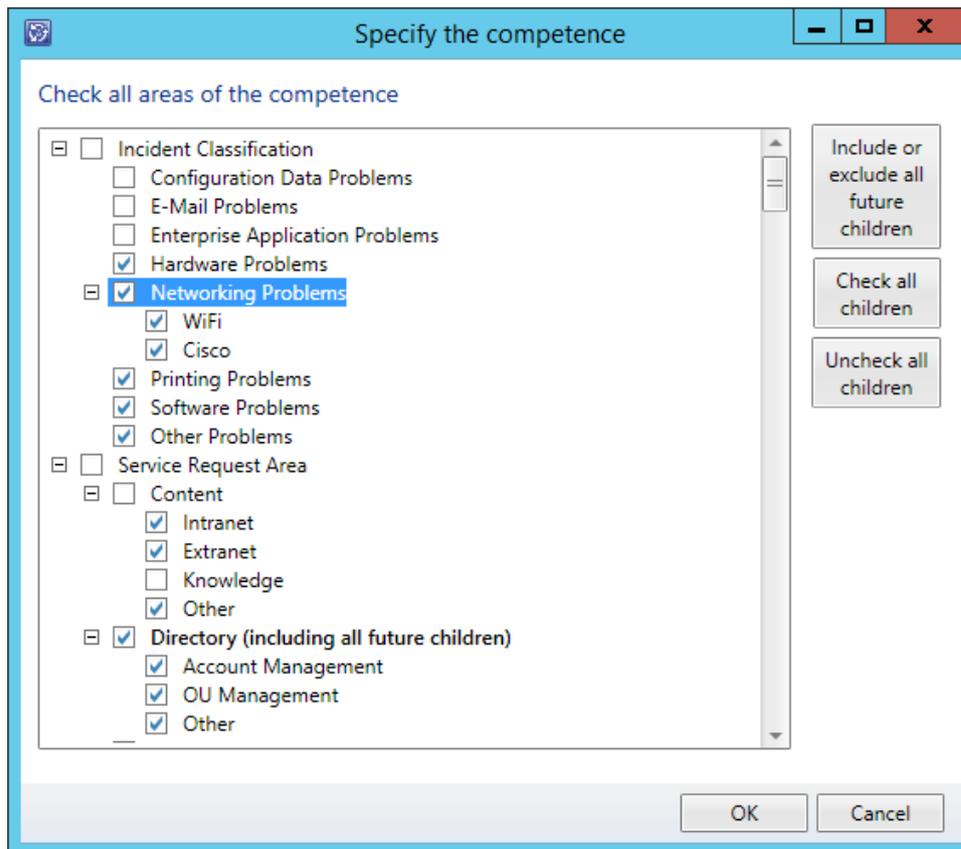


Fig. 9 Defining the competence

Using the tree of the combined enumerators of the work items, check all classifications in which the selected people are qualified.

Use **Include or exclude all future children** button on the tree's element to set the behavior for the future sub elements.

Note that this checkbox tree requires each element be checked explicitly.

## 5.4 Other settings

On **Other Settings** page you can set the rest of the settings.

To improve the user experience the background workflow works to calculate and cache SLO data for each user as well as the membership of the Active Directory groups that participate in Service Manager groups defined earlier. **Polling interval** sets the scheduler's interval for that workflow.

The workflow starts working when you first time save the settings and the management pack **SCUtils SmartAssign Performance Counting Workflow Library** is created.

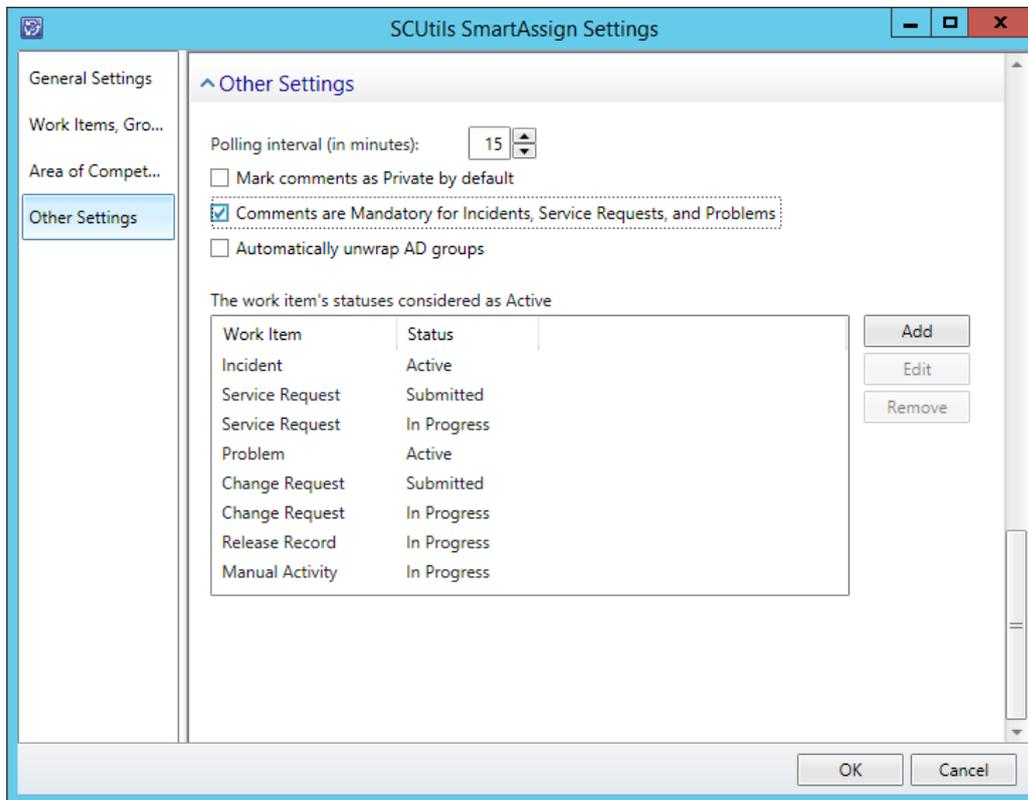


Fig. 10 Other Settings

You can also make comments private and required by default.

In the case you prefer to rely on Active Directory groups other than on the Service Manager ones, you might prefer to unwrap all Active Directory groups in task's form automatically.

The above-mentioned workflow counts the work items for each analyst and the SLO status for each Incident and Service Request that has an assigned analyst and the status considered as 'Active'. You can edit the list of these statuses.

## 6 How it works

After the installation, activation, and setup users can start using the task that appears in the Service Manager console's views and forms for the following work items and their derivatives:

- Incidents
- Service Requests
- Problems
- Change Requests
- Release Records
- Manual Activities

The name of the task is **Assign to Analyst**.

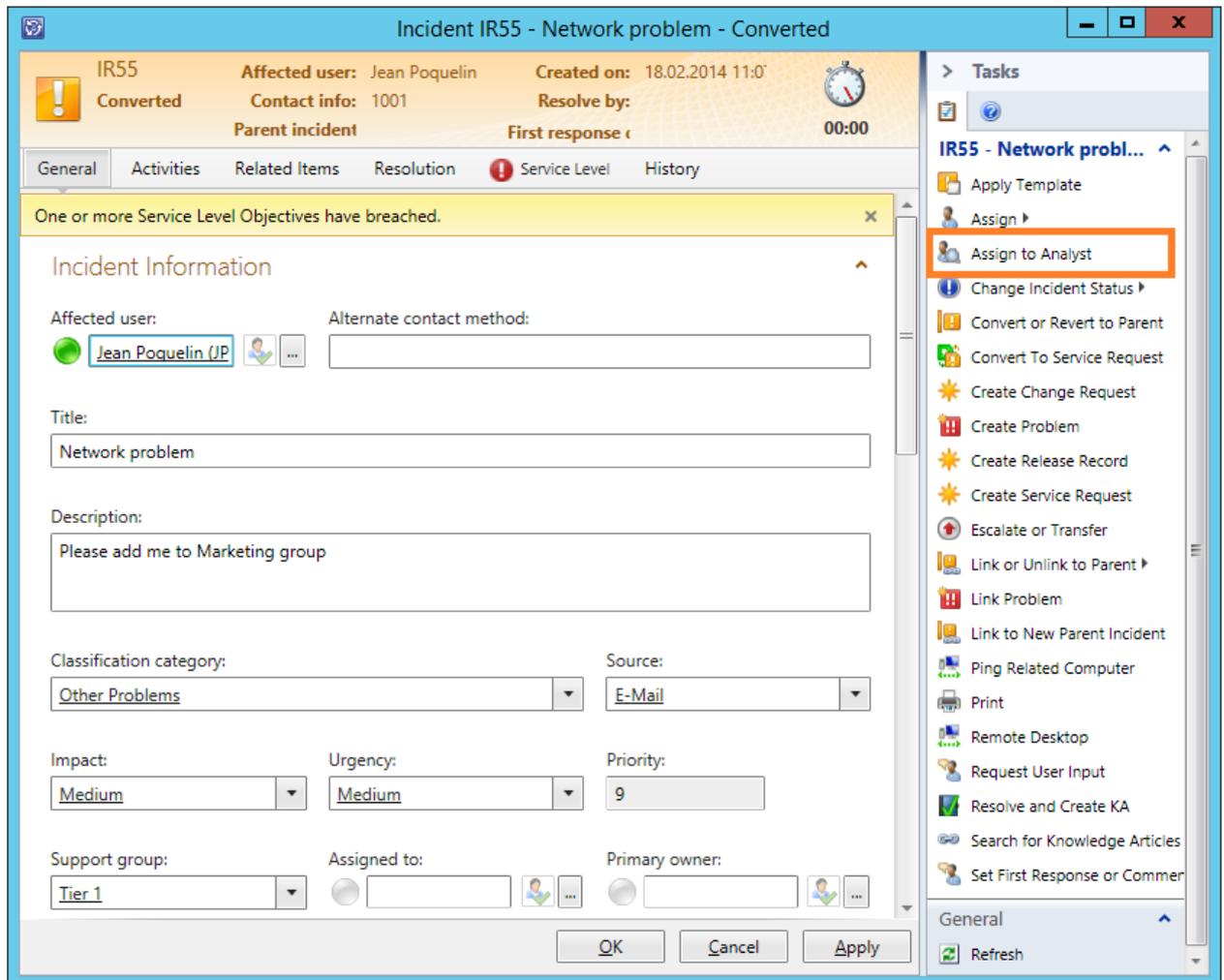


Fig. 11 *Assign to Analyst* task

After clicking on the task in the task pane of the view or form, the task dialog will appear on the screen. The information in the form can vary depending on the type of the work item and the settings you defined.

Select an appropriate analyst

Current Assigned User: \_\_\_\_\_ Current Support Group: **Tier 1**

Current Classification/Area: **Printing Problems** Support Group: **Tier 1**

Filter by Classification/Area

Display Name	Acco...	Incidents	Service Reque...	Prob...	Chan...	Rele...	WI t...	Man...
William Faulkner	CON...	0 0 0 0	0 0 0 0	1	0	0	1	0
CONTOSO\Outsour...	CON...	0 0 0 0	0 0 0 0	0	0	0	0	0
William Shakespear...	CON...	0 0 0 0	0 0 0 0	0	0	0	0	0
Geoffrey Chaucer	CON...	0 0 0 0	0 0 0 0	0	0	0	0	0
Jules Verne	CON...	0 0 0 0	0 0 0 0	0	0	0	0	0
Charlotte Gues	CON...	0 0 0 0	0 0 0 0	0	0	0	0	0

Least Loaded  
Best SLOs  
Unwrap the AD group

Comment: \_\_\_\_\_  Mark Escalated  Is Private

OK Cancel

Fig. 12 The task's form

If you don't see the list of the users and groups that means that no Service Manager group has been associated with a current support group or no support group is selected or the associated Service Manager group is empty.

If you don't see the list of the analysts and groups and no tier is selected, then select a support group using the enumerator control on the right top of the form.

If you have an Active Directory group in the list (marked with an icon in the first column), you can unwrap its members using **Unwrap the AD group** button. After unwrapping the Active Directory group will stay in the list.

Only users and groups presented in the Configuration Items (CMDB) can be populated in the list.

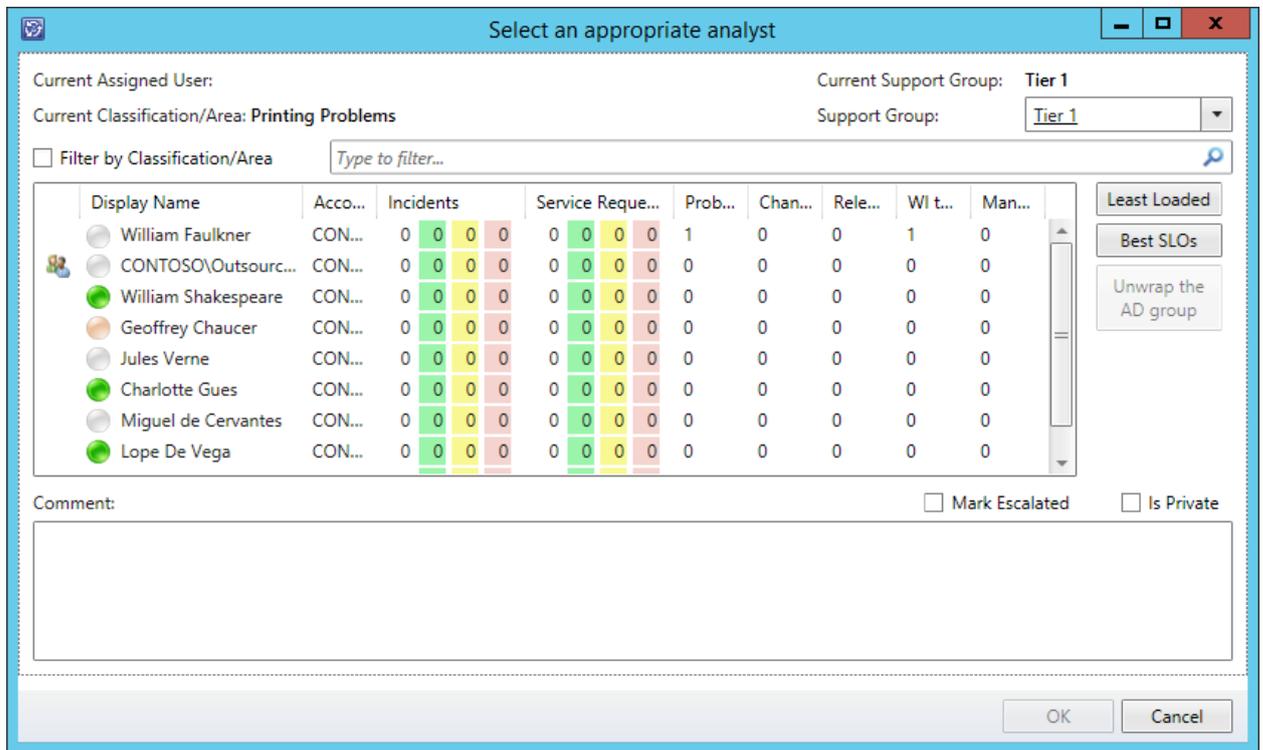


Fig. 13 the list with the unwrapped AD group

In the form the user sees the list of the users and groups that are members of the corresponding Service Manager group.

Besides total counts, Incident and Service Request's cell has the additional counts for the tickets with **Breached**, **Warning**, and **Health** SLO status.

The user can filter the list by clicking on the header of the every column.

The user can also filter the list to find the least loaded users of groups by clicking on **Least Loaded** button and best performed in the term of SLOs by clicking on **Best SLO** button.

**Least Loaded** means the smallest number of the sum of the **WI total** count (the sum of the work items presented in the row) and **Manual Activities** count.

**Best SLO** means the smallest **Breached** count. Among items with the equivalent **Breached** count, the item with the smallest **Warning** count is preferred.

Checking **Filter by Classification/Area** the user can sort the list using the competence defined for each user or group.

Select an appropriate analyst

Current Assigned User: \_\_\_\_\_ Current Support Group: **Tier 1**

Current Classification/Area: **Printing Problems** Support Group: **Tier 1**

Filter by Classification/Area

Display Name	Acco...	Incidents				Service Reque...				Prob...	Chan...	Rele...	WI t...	Man...
William Shakespeare	CON...	0	0	0	0	0	0	0	0	0	0	0	0	0
Charlotte Gues	CON...	0	0	0	0	0	0	0	0	0	0	0	0	0
Lope De Vega	CON...	0	0	0	0	0	0	0	0	0	0	0	0	0

Least Loaded  
Best SLOs  
Unwrap the AD group

Comment:  Mark Escalated  Is Private

OK Cancel

Fig. 14 Filtered by Classification

After selecting the most appropriate user or group, for Incidents, Service Requests, and Problems the user can (or has to if required) add a comment being able to mark it as **Private** for Incidents and Service Requests.

The user can mark the Incident as escalated using **Mark Escalated** checkbox.

If the user runs the task from the form, the changes will be saved only after using **OK** or **Apply** buttons.

## 7 Known issues and troubleshooting

Here we describe the known issues. If you haven't found a solution in this section, please contact us at [support@scutils.com](mailto:support@scutils.com).

### 7.1 Logging

When the performance workflow runs it logs events in the Operations Manager event log. The source of these event is **SCUtils SmartAssign**. In the installation folder (default path is *C:\Program Files\SCUtils\SCUtils SmartAssign*) you can find a registry file named **SCUtils SmartAssign Registry settings.reg**. After running it on the Service Manager management server and adding the required folder and key in the registry (path **HKEY\_LOCAL\_MACHINE\SOFTWARE\SCUtils\SCUtils SmartAssign**) you can edit the value of **LoggingLevel** that defines the level of the logging. By default, the workflow logs only error events into the Operations Manager event log. You could set the **LoggingLevel** value from 1 (low level) to 4 (high level).

If the registry value does not exist, the logging level is set to default 1 (only errors logging).

### 7.2 Active Directory group named Domain Users cannot be unwrapped

**Domain Users** group is a default Primary Group in Microsoft Active Directory. The solution is not designed to enumerate all domain users for IT service desk's support groups.

Please avoid using **Domain Users** group. The Primary Group in Active directory can be manually changed so the same rule is applied to any other Primary Groups.

### 7.3 In the task's form no statistics for users and groups is presented

The statistics is collected by the workflow defined in the management pack named **SCUtils SmartAssign Performance Counting Workflow Library**.

If this management pack is not presented in the list of all the management packs (**Administration -> Management Packs**), please open **SCUtils SmartAssign Settings** again and click **OK** button to save the wizard. The management pack **SCUtils SmartAssign Performance Counting Workflow Library** is created and imported each time when the wizard is saved.

If the management pack is presented, please check the workflow's status (**Administration -> Workflows -> Status**). The workflow's name is **SCUtils SmartAssign Performance Counting Workflow**.

If the workflow runs with **Success** status, please enable logging (p. 7.1) and set **LoggingLevel** to 4 for the verbose logging. If the information in the log does not help you resolve the issue, please send the log at [support@scutils.com](mailto:support@scutils.com).

### 7.4 Lync presence is grayed out for all users

The Lync presence for users is utilized the SCSM API. If the SCSM console doesn't show the Lync presence, then SCUtils SmartAssign doesn't show too. So far, the SCSM 2012 console shows the Lync presence only if **Lync 2010** client is deployed and signed in on same the computer.