vFire App User Guide

Version 1.4
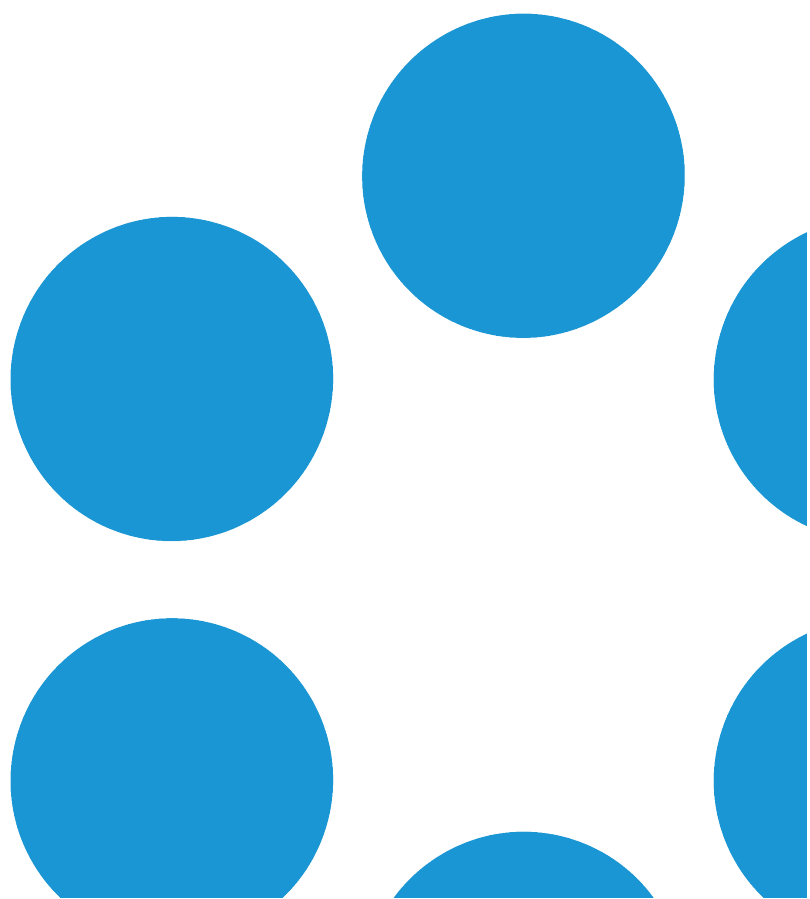
Table of Contents

Version Details

This document supports the version of the product listed. The table below contains version details for the guide.

Version No.	Date	Details
1.0	25 January 2017	This user guide documents the vFire app v1.0.0.
1.1	17 May 2017	This user guide documents the vFire app released as part of the 9.8.1 software release, at which it became available for android and iOS phones.
1.2	31 May 2017	Updates prior to the 9.8.1 release.
1.3	28 September 2017	Updates to reflect the additional functionality introduced in the 9.9.1 release.
1.4	28 February 2018	Updates to reflect the additional functionality introduced in the 9.10.1 release, in which the functionality available in the vFire Officer app was incorporated into the vFire app.

Online Support

For information about Alemba products, or licensing and services, visit **www.alemba.com**.

For software updates, documentation, release notes and support using the system, visit **www.alemba.help/help**

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

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About this Document

This user guide contain instruction and information on the features of the vFire app.

Intended Audience

This document is written for users and system administrators who are responsible for use of the vFire app.

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 interest/significance to certain users. Notes are also highlighted in a shaded box.
	Warnings. These are also highlighted in a shaded box.
Field name	Fields and buttons are highlighted in bold text.

About the vFire App

With Alemba's vFire app, users can access their calls, approvals, orders and asset lists on iOS, Windows and android mobile phones. They can add notes and view the history of the call, action approvals, and view orders and assets.

From 9.10.1, analysts can use the app to access their calls on the go, viewing details of calls assigned or forwarded to them. They can forward the call to another analyst or group, update the call notes, review history, change the status or close a call.

To use the app, you need to carry out the following. Select the appropriate links for full instruction.

1. Ensure that your system and mobile devices meet the required prerequisites, as detailed in the **System Administrator notes**.

   > This app uses the Alemba API.

2. **Install** and configure the app. You will need certain details from your system administrator to complete this step.

3. **Log in**. If you are stored in the system as a User, you will be automatically taken to the page 12. If you are stored as an Analyst, you will be taken to the **vFire App Home Screen (Analyst login) in the online help**. If you are stored as an Analyst and User, you will be prompted to decide which functionality you want to access; user or analyst, and then taken to the relevant home page.

4. If you are logged in as a user, you can **log calls**, and view your **calls**, **approvals**, **orders** and **assets**. If you are logged in as an analyst, you can view your call lists, and details of calls assigned or forwarded to you. You can **forward the call** to another analyst or group, **update the call notes**, review **call history**, change the **status** or **close** the call.

> In this version of the app, screen designs are static. Only plain text is supported; images and HTML formatting will not be displayed.

> The app is supported on android, windows and iOS phones for users from 9.9.1; and analysts from 9.10.1.

Installing the vFire App

1. The app is supported on android, windows and iOS phones for users from 9.9.1; and

    <div align="right">

    vFire

    </div>

    analysts from 9.10.1. Download the app from the appropriate app store.

2. Download the app. It is available from the following stores:
    - For UK users:
        - itunes - **https://itunes.apple.com/gb/app/vfire/id1240219703**
        - google play - **https://play.google.com/store/apps/details?id=vFire.vFire**
        - microsoft - **https://www.microsoft.com/en-gb/store/p/vfire/9nblggh4wkvs**
    - For US users:
        - itunes - **https://itunes.apple.com/us/app/vfire/id1240219703**
        - google play - **https://play.google.com/store/apps/details?id=vFire.vFire**
        - microsoft - **https://www.microsoft.com/en-us/store/p/vfire/9nblggh4wkvs**

3. Install the app following the onscreen instructions.

Once the app has been installed onto your device, you can configure its settings.

Configuring the vFire App

You will need to configure your app before using it for the first time. Once you have the settings in place, you will not need to do it for further logins on the same device.

> If the vFire app is removed from your device or if you want to use the app on a new device, you will need to complete this configuration process again.

1. From the login screen, select the menu button. This will differ depending on the type of phone.

iOS	Tap on the ▤ button in the bottom left hand corner
Windows	Tap on the ⋯ button in the bottom right hand corner
Android	Tap on the ⋮ button in the top right corner

2. Select **Settings** to display the settings screen. (When you first log in, this screen is displayed automatically.)
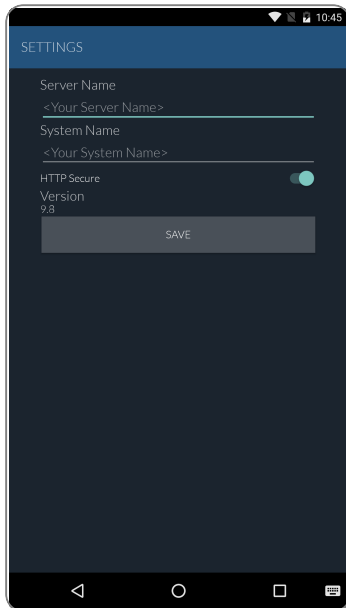
3. Enter the **Server Name** and **System Name** , and select the **HTTP** settings, all of which should be specified by your system administrator.

4. Select **Save** and close the screen.

5. You can now log in to the application. The settings that you have entered will be validated when you log in.

Logging in to the vFire App

In order to access the app, you must log in by supplying a valid login ID and password. This is the same login ID and password that you use to log into other vFire interfaces, such as Nano, Core or vFire Self Service.

> You may have integrated authentication set up for your desktop vFire Core application. This is supported by the vFire app.
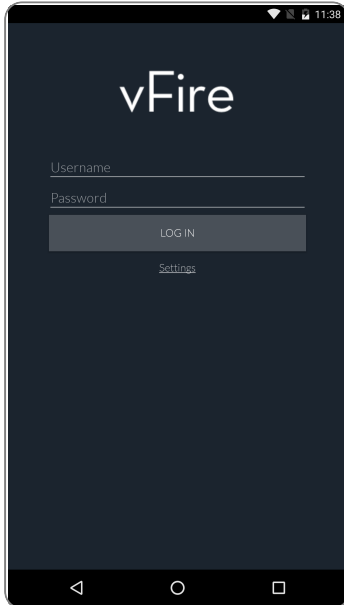
Type in the details and then tap LOG IN.

> The app is locked to the portrait aspect.

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Failed Login Attempts

You must log in with the correct login ID and password, or you will receive an error message and be prevented from logging in.

Exceeding Maximum Login Errors

Your system may be configured by your system administrator to lock users out after a set number of failed attempts. The same number of login attempts apply to the vFire app. If you exceed the maximum number of attempts allowed, the following message will be displayed. (In the example below, the maximum number of attempts is 3.)

You will need to contact your system administrator to reset your password.

Logging out

Once you have logged in, you will stay logged in until one of the following things happen:

- Your mobile device logs you out automatically. This usually happens after the app has been stopped or the device has been reset.

- You manually log out.

- The session expires when the timeout limit set by the system administrator has been reached.

  If you receive an Object Ref error, simply close the app and log in again.

To manually log out of the system, select the menu button -

iOS	Tap on the ☰ button in the bottom left hand corner
Windows	Tap on the ••• button in the bottom right hand corner
Android	Tap on the ⋮ button in the top right corner

and select **Log Out**.

The vFire App Home Screen (User login)

The following home screen is displayed when you log in as a User. It provides a quick overview of items that are currently active in the system. Your access is based on your permissions for vFire Self Service.
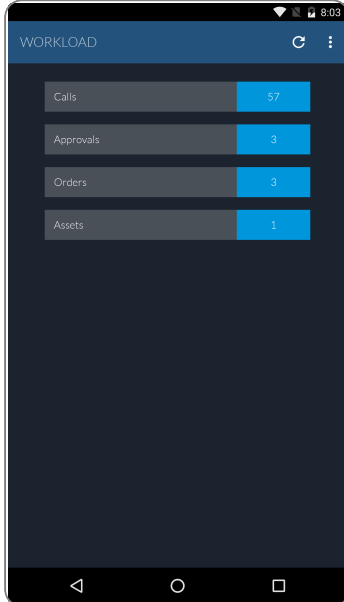
The tiles display the following information.

Calls	The number of open calls that have been created by or for you
Approvals	The number of approvals that have been forwarded to you
Orders	The number of orders that you have submitted that are currently being processed
Assets	The number of assets for which you are recorded as the user

You can only view those calls, approvals, orders and assets that are visible to you as a user in the Self Service portal.

You can access further options by selecting the menu button. This varies depending on the phone type.

iOS	Tap on the ▤ button in the bottom left hand corner
Windows	Tap on the ⋯ button in the bottom right hand corner
Android	Tap on the ⋮ button in the top right corner

Logging Calls in the vFire App (User login)

You can log calls as a user using the vFire app.

> ✋ **Before you start**
>
> You must have permission to log a call in the Options Tab of your **IPK Management security role**.
>
> The app is currently available on Windows 8.1 and 10; iOS version 11; and Android version 6.0.1 phones or higher.

1. page 10 as a User.

2. From the home screen, select the menu button.

iOS	Tap on the ☰ button in the bottom left hand corner
Windows	Tap on the ⋯ button in the bottom right hand corner
Android	Tap on the ⋮ button in the top right corner
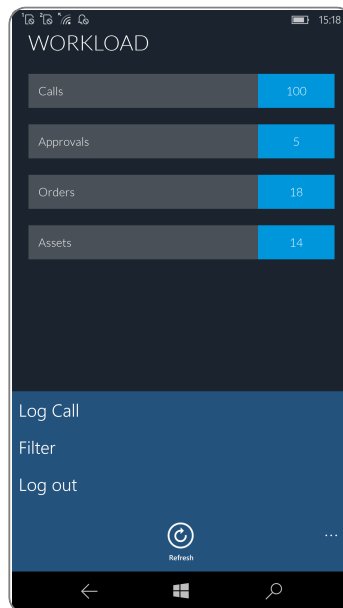
3. Select the **Log Call** option.

4. If you are using an iOS phone, you will see a screen in which you can select the **call template**.
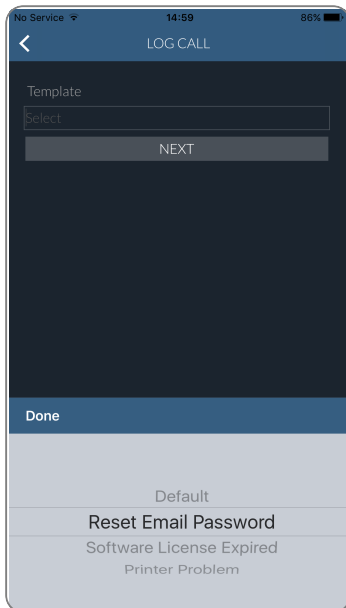
> Call templates are used to make logging calls easier. Different templates are used for different call or problem types, as they often require different information from the user.

5. Select the template you require, and then select **Done**.

> You can only see call templates that you have permission to use to log the call.

> Although the call templates used are taken from vFire Core, the call template does not pre-populate fields with information in the app, as it does in vFire Core.

6. The **Log Call** screen is displayed.
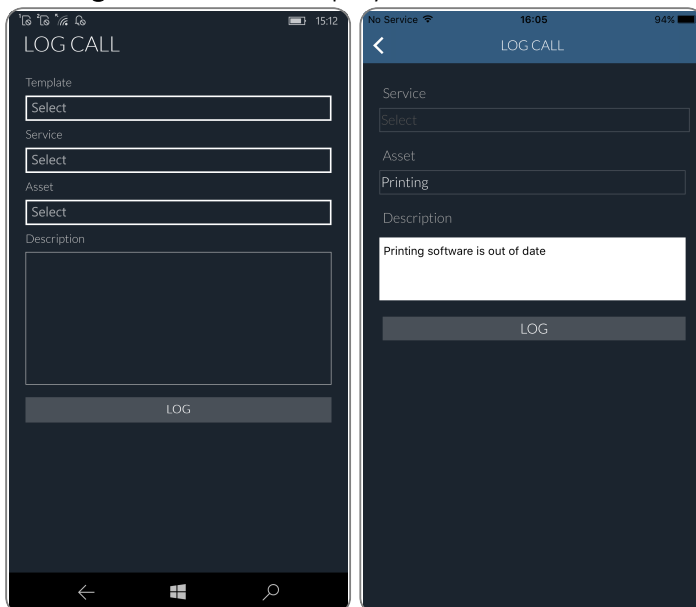
7. Complete the details.

Template	Select the Call Template you want to use. This is a mandatory field. The Call template is used to determine what fields are required/displayed.

> This field is only displayed if there are several templates to choose from. It is not displayed on iOS phones, as this information has already been supplied. You only have access to permitted templates.

> Although the call templates used are taken from vFire Core, the call template does not pre-populate the fields with information in the app, as it does in vFire Core.

Service	Select the service you wish to log the call against. You will only see the services that you have permission to access.
Asset	Specify the asset you wish to log the call against. You can choose from a list of configuration items. You will only see the items that you have permission to access.

> This list does not include services. Assets in the app equate to Resources in vFire Self Service.

Description	Key in a description of the issue. This field is mandatory.

8. When you have completed the details, select **LOG**.

When a call is logged via the app, the logging method will be declared as 'Portal'.

Viewing your Calls in the vFire App (User login)

You can access your calls by tapping the tile on the **Workload** (home) screen.

Depending on your permissions, you will initially see a list of all open calls that you have logged, have been logged on your behalf, or are logged about your organization.
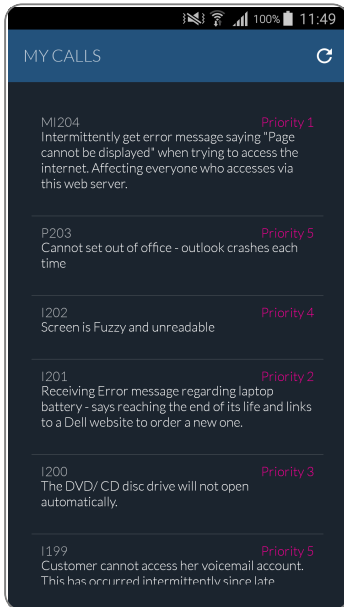
The Call List displays the **IPK status** and **Call Number** as well as the **Priority** and **Short Description** (limited to 200 characters). The list is sorted by Call Number with the most recently raised calls at the top. Swipe to scroll up and down.

Tap a call to view the details.
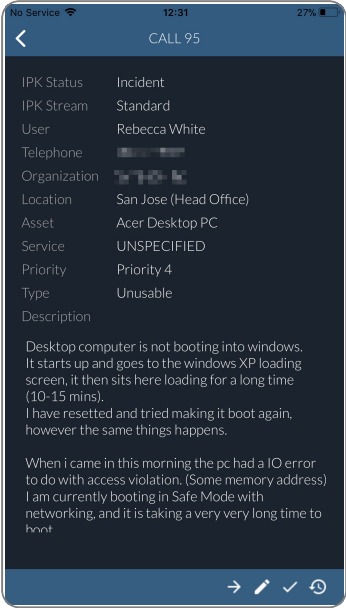
Filtering Calls

Depending on your access permissions, you can filter the calls displayed in the call list, based on whether they were logged by you; on your behalf; or on behalf of your organization.

To filter your call list, select the Menu button. The appearance of the button will differ depending on the device.

iOS	Tap on the ☰ button in the bottom left hand corner
Windows	Tap on the ••• button in the bottom right hand corner, and then **Filter**
Android	Tap on the ⋮ button in the top right corner, and then **Filter**

From the menu, select **Filter Calls**.
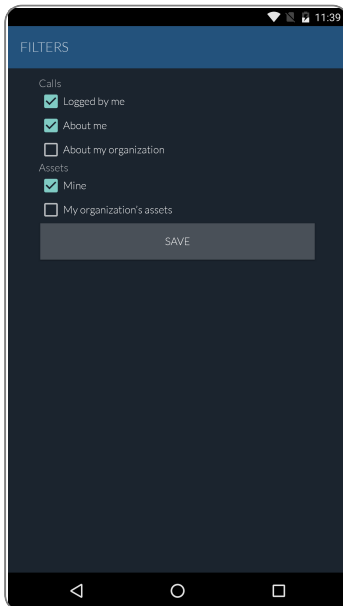
Select the filter you require:

Logged by me	This will display calls which were logged by you, and you are the affected user.

> ✋ You must have **Review Own Calls** selected in the Options Tab of your **Self Service Portal role** to see this checkbox.

About me	This will display calls which were logged by someone else, but you are the affected user.

> ✋ You must have **Review Own Calls** selected in the Options Tab of your **Self Service Portal role** to see this checkbox.

About my organization	This will display calls in which you are not the affected user, but your Organization is the Organization on the call.

> ✋ You must have **Review All Calls** selected in the Options Tab of your **Self Service Portal role** to see this checkbox.

Save the filter settings to return to the **Workload** screen. Then tap the required tile to display a list of items in that category.
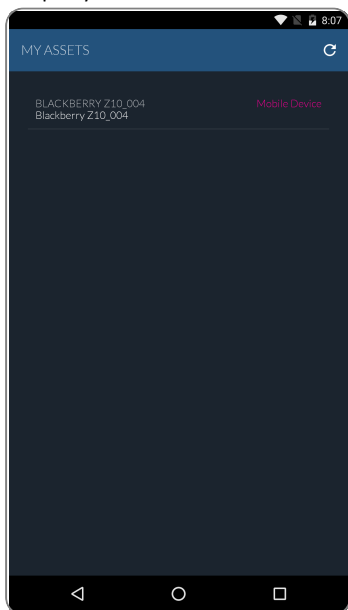
Viewing Call History

To see the history of a call, tap the menu button and then select **Call History** .

This opens a new screen, listing the actions, when they took place, the analyst or user and the type of action that was carried out (for example 'Incident Updated'). The list is sorted by

Action Time. Dates are offset against the time zone set on the phone. You may need to scroll down to see the most recent update.
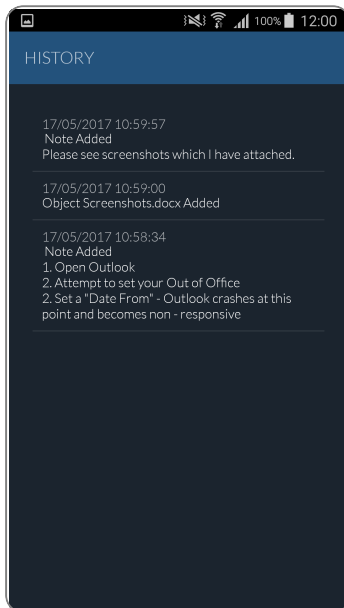
System Actions are not shown.

Adding a Note to a Call

1. To add a note to the call, tap the menu button and select **Add Note**.
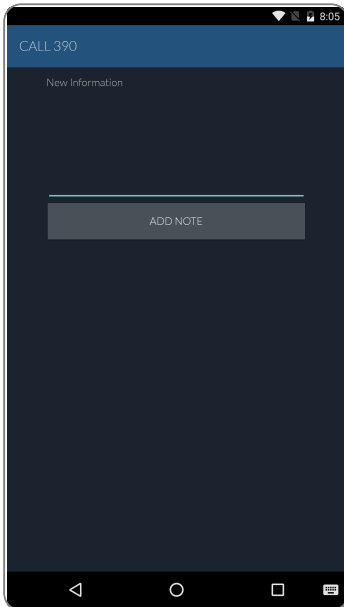
2. The **Add Note** screen is displayed.

3. Complete the details, and then tap the ADD NOTE button. You will receive a message confirming that the note has been added. It will appear in the call history, flagged as being entered in the portal.

Viewing your Approvals in the vFire App (User login)

You can access your approvals by tapping the tile on the **Workload** (home) screen. You will initially see a list of all of your outstanding approvals.
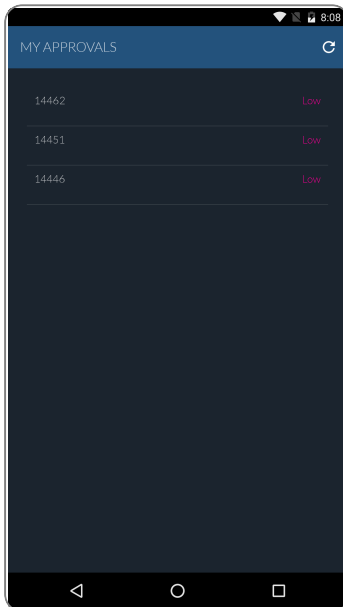
Tap on an approval to see the details.
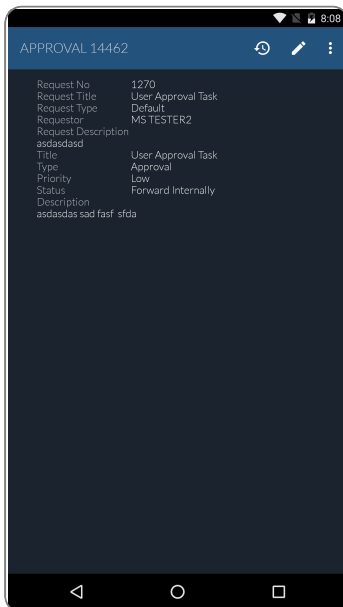
In this version of the app, the fields are static and custom screen designs are not rendered. Only plain text is supported; images and HTML formatting will not be

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displayed.

From here, you can view the history, add a note, approve or reject the approval.

Viewing your Orders in the vFire App (User login)

You can view all of your outstanding orders by tapping the tile on the **Workload** (home) screen. You will initially see a list of all of your orders.
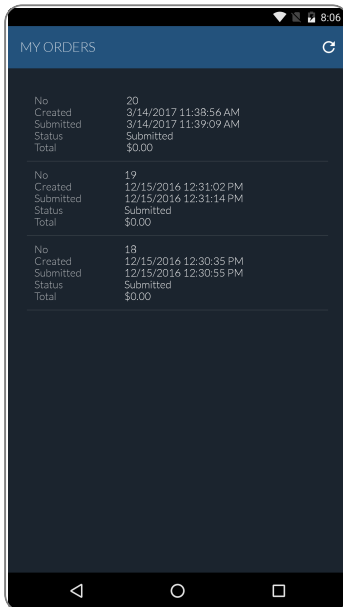
Tap an order to view the details.
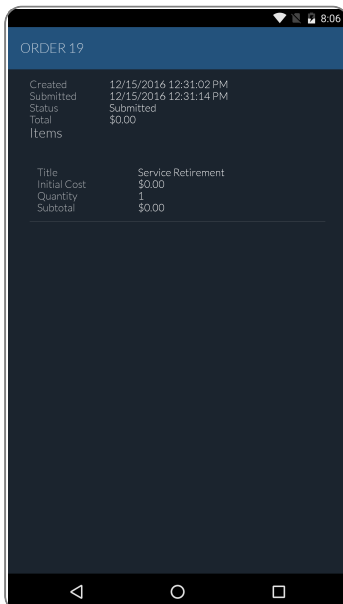
Viewing your Assets in the vFire App (User login)

You can access your existing assets by tapping the tile on the home screen.
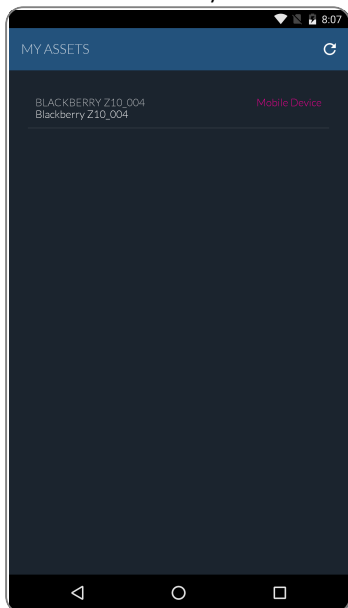
> Only existing configuration items are displayed. Deleted items will not be shown.

Filtering Assets

Depending on your access permissions, you can filter the list of displayed assets to those in which you are the user identified in the Configuration Item details; or your organization is listed on the CI details.

Tap the menu button. The appearance of the button will differ depending on the device.

iOS	Tap on the ▤ button in the bottom left hand corner
Windows	Tap on the ⋯ button in the bottom right hand corner
Android	Tap on the ⋮ button in the top right corner, and then Filter

Select the filter option:

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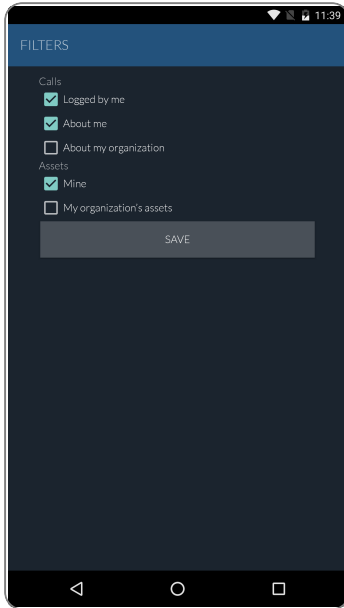
Mine	Calls in which you are the user on the Configuration Item details
	✋ You must have **Review Own CIs** selected in the CMDB Tab of your **Self Service Portal role** to see this checkbox.
My organization's assets	Calls in which you are not the user on the Configuration Item details, but your organization is the Organization listed on the Configuration Item details
	✋ You must have **Review All CIs** selected in the CMDB Tab of your **Self Service Portal role** to see this checkbox.

Select **Save** to save the filter settings and return to the asset list. Tap on an asset to see the details.

vFire App Home Screen (Analyst login)

The home screen is displayed once you have logged in and provides a quick overview of items that require your attention.
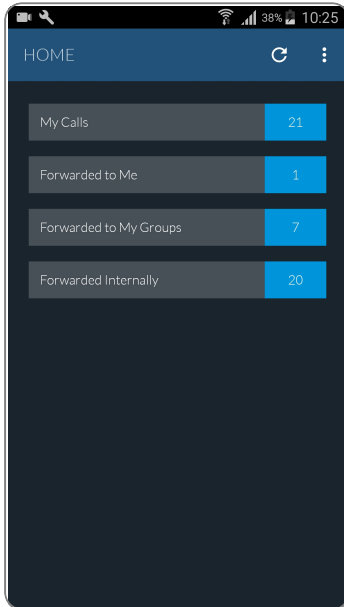
The tiles display the following information.

My Calls	The number of calls that are currently assigned to you, excluding calls that have been forwarded to another analyst or group
Forwarded to Me	The number of calls that have been forwarded to you
Forwarded to My Groups	The total number of calls that have been forwarded to your groups
Forwarded Internally	The number of calls that you have forwarded internally

Tap the required tile to display your **Call List** for that category.

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Refreshing your Screen

To refresh the current call list, select the button . This button is displayed on the **home** and **call lists** screens.

Logging out

To log out of the app, select the menu and then the **Logout** button .

Viewing Call Lists in the vFire App (Analyst login)

✋ Before you start

You must have permission to view calls in the Options Tab of your **IPK Management security role**.

Your session will be linked to the partition that is flagged as your default, but you will be able to see and work on items from all your partitions.

The app is currently available on Windows 8.1 and 10; iOS version 11; and Android version 6.0.1 phones or higher.

1. You can access any of your call lists by tapping any of the tiles on the **Home** screen. Select from **Your Calls**, **Forwarded to You**, **Forwarded to Group** or **Forwarded Internally**.

   📝 The Groups will be those IPK Groups explicitly assigned to you against your Person record, and also IPK Groups linked to your IPK Management Security Role.

2. You will see a list of all calls for the category you have chosen.
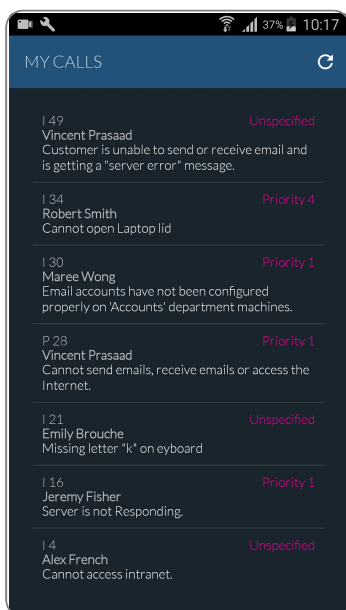
3. The Call List displays the **IPK status** and **Call Number** as well as the **Priority**, **Customer Contact** and **Short Description**. The short description is taken from the main

application, and is limited to 200 characters.

4. The list is sorted by **Call Number** with the most recently raised calls at the top. Swipe to scroll up and down the list.

5. Tap a call to view the details.

Viewing and Updating Calls in the vFire App (Analyst login)

✋ Before you start

You must have permission to view calls in the Options Tab of your **IPK Management security role**.

Your session will be linked to the partition that is flagged as your default, but you will be able to see and work on items from all your partitions.

The app is currently available on Windows 8.1 and 10; iOS version 11; and Android version 6.0.1 phones or higher.

1. You can access any of your call lists by tapping any of the tiles on the **Home** screen. Select from **Your Calls**, **Forwarded to You**, **Forwarded to Group** or **Forwarded Internally**. You will see a list of all calls for the category you have chosen.

2. Tap to open the call that you want to view or work with.

3. Call details are displayed on the screen shown below.
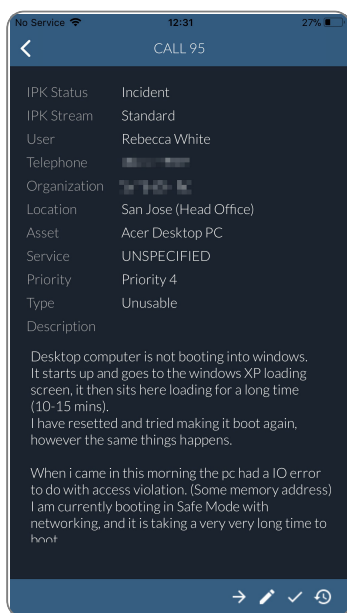
> 📝 In this version of the app, the screen designs are static. Only plain text is supported; images and HTML formatting will not be displayed.

4. You can select options to view call history, forward calls internally, action or close a call using the buttons and menu options on this screen.

> 📝 Locked Calls will display a warning message when they are viewed.

Viewing Call History

To see the history of a call, tap the Call History button ⟲ .

This opens a new screen, listing the actions, when they took place, the analyst and the type of action that was carried out (for example 'Incident Updated'). The list is sorted by Action Time. Dates are offset against the time zone set on the phone. You may need to scroll down to see the most recent update.

> System Actions are not shown.

Forwarding a Call Internally

1. To forward a call internally, tap the **Forward** button → from the **Call Details** screen. This opens a new screen showing options for forwarding to an analyst or a group, including analyst or group name, status, and action and solutions. You are also able to set whether the update is visible to users via vFire Self Service.
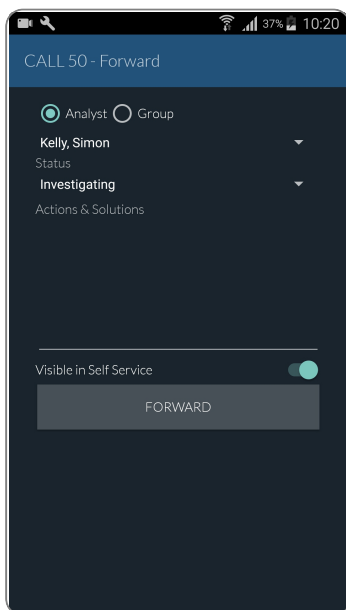
2. Tap **Analyst** or **Group** to determine whether a call should be forwarded to one particular analyst or to a pre-defined group. Analysts will be able to see calls forwarded to them in the **Forwarded to You** and **Forwarded to Your Group** tiles on the **Call List** screen.

3. A text box displays the first analyst or group from the list. Tap this field to see a full list. Tap the required option to select.

4. Select the **status** by tapping the field to select from a list of status types.

5. The **Actions & Solutions** field is a non-mandatory field which you can use to add notes to the forwarded call. This is a plain text field. These will display in the **Call History**.

6. The **Visible in Portal** option enables you to set whether the update is visible in vFire Self Service. This option is set to **Off** by default.

7. Once the correct options have been selected, select **Forward** to forward the calls to your selected group or analyst. A pop-up window notifies you whether the call has been successfully forwarded.

> If the call is locked by another analyst, a message is displayed.
>
> An email is automatically sent to the receiving analyst or group email address notifying them that the call has been forwarded.
>
> If you are not the current analyst for this call, selecting **Forward** will update the ownership of the call to you before it is forwarded on.

Actioning a Call

1. To update a call, tap the menu button on the **Call Details** screen, if necessary, and then select the **Action** button . This opens a new screen showing options for updating the call with any text entered in the **Actions & Solutions** field but will otherwise leave the assignment of the call unchanged.

> **Action** functions in the same way as the **Defer** option in vFire Core.
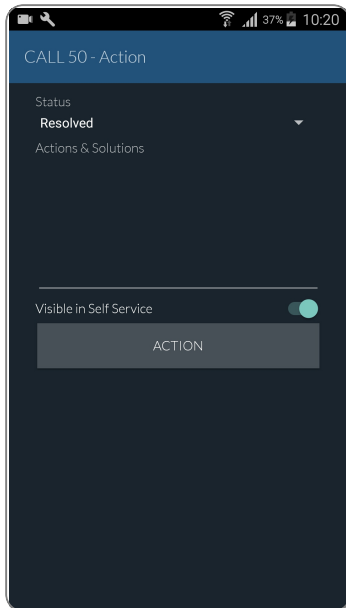
2. Select a **status** by tapping the field to select from a list of pre-defined status types. These are subject to partitioning.

3. The **Actions & Solutions** field is a plain text field, in which you can type the action details if you wish. These will be saved in the **Call History**.

4. The **Visible in Portal** option enables you to set whether the update will be visible in vFire Self Service. This option is set to **Off** by default.

5. Once the correct options have been chosen, select **Action** to add the update to the call. A pop-up window notifies you whether the call has been successfully actioned or updated.

6. Tap **OK** to complete the action and return to the **Call List** screen.

> If you are not the current analyst for this call, selecting **Action** will update the ownership of the call to you. Your partition will not be applied to any updated records. The partition on those records will remain unchanged.
>
> Actioning a call does not close the first callback.

Updating the Call Notes

1. To add or update a note on a call, tap the menu button in the **Call Details** screen, if necessary, and select **Add Note**.
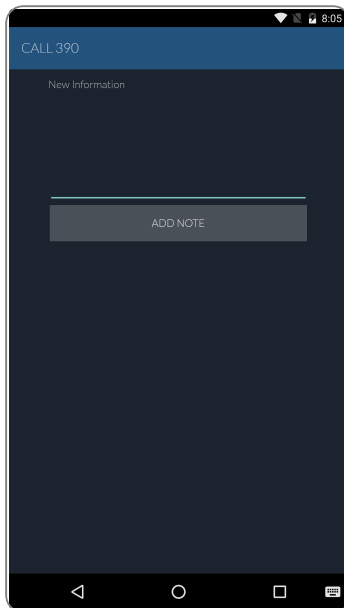
2. The **Add Note** screen is displayed.

3. Complete the details, and then tap the **ADD NOTE** button. You will receive a message confirming that the note has been added. It will appear in the call history, flagged as being entered in the portal.

Closing a call

1. To close a call, tap the menu button on the **Call Details** screen, and then select **Close**.

> If you are not the current analyst for this call, selecting **Close** will update the ownership of the call to you.

2. This opens a new screen which enables you to close the call and enter call closure details.
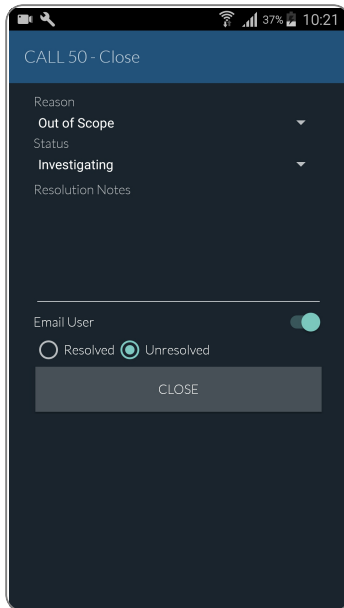
3. Complete the details.Reason (list) - .

Reason

Tap the field to select a reason for call closure from the list of pre-defined reasons. This field is blank by default. It is a mandatory field and you must select one of the options in order to close the call.

> If closure reasons are partitioned, only the reasons for the analyst's login partition are shown.
>
> Available reasons may be determined by **Closure Reason Linking** in the IPK Settings (Partitioned) window. If the setting in this window is **Reason to Type**, this applies to the Type on *Call*, not on the Closure screen in Core.

Status

Tap the field to select a call status from the predefined list.The available statuses are subject to partitioning.

Resolution Notes

Enter notes relating to the call closure. This is a plain text field. Notes will be saved in the Call History. This field is not mandatory.

Email User	This checkbox enables you to send an email to the user recorded on the call. This shows **Off** by default.
Resolved/Unresolved.	This toggle enables you to record the resolution status of the call. This shows **Resolved** by default.

4. When you have finished, select ☑ to close the call. A pop-up window notifies you whether the call has been successfully closed. You will be returned to the **Call List** screen.

> If the call being closed is linked to other calls as a parent, the child calls will also be closed unless they are currently in use by another user.
>
> Your partition will not be applied to any updated records. The partition on those records will remain unchanged.

vFire App System Administrator Notes

The vFire app is designed to be an easy way for end users to access their calls, approvals, orders and asset lists. They can add notes and view the history of the call, action approvals, and view orders and assets, and, from 9.9.1, log calls.

First, check that your system meets the required prerequisites. Then ensure that your users have the access permissions required to allow them to log calls, and access appropriate call templates, services and assets.

vFire App Prerequisites

The vFire app is designed for users to log calls, and view their calls, approvals, order and assets. Before users can install the app on their mobile devices, you need to ensure that your system meets the following prerequisites, and configure your environment.

- The app uses the **Alemba API**, which is installed by default when you install/upgrade to 9.7 or above. The Alemba API and the Alemba.web services must be running on the relevant server.

- You must be using **vFire Core 9.10.1** or above (server version). If you are running a lower version of vFire Core, users may experience issues.

- The mobile device must be able to navigate to the **vFire HTML pages** delivered via IIS web services. This may require you to configure your firewall.

- Ensure that your authentication is correctly configured for the app. See the documentation on **Authentication** in the online help for more details.

- Users must have a **valid vFire login** account, and be flagged as a User and/or Analyst.

- Users must know their **system name and URL** to configure the settings when they first use the app, or change device.

- The app is currently available on Windows 8.1 and 10; iOS version 11; and Android version 6.0.1 phones or higher.

Tested Platforms

The app has been tested on the following devices. (Other devices are also supported.)

- HP Elite X3 running Windows 10 Mobile
- iPhone 6+ running iOS 11.2.6
- Samsung Galaxy S5 running Android version 6.0.1

Compatibility Statement

Currently, the app is only available in English, and for the mobile phone types and platforms specified. We do not support other tablets or devices in this release. If in doubt, please assume that the prerequisites outlined above are accurate.

vFire App and Authentication

When users first attempt to log in to the app, they are prompted for the following information:

Server Name	The server ip address or server name
System Name	The system name, as defined in the server console, under Virtual Directory
HTTP Secure	Choose whether you want to use this setting

They should be informed of the appropriate entries for these settings.

They must also exist as Users in vFire Core, with a valid login id and password. If they are not already established users of vFire, you should also inform them of these details.

> From 9.9.1, the app supports windows authentication. For more details on using authentication, see the **Authentication** topic in the online help.

vFire App and Partitioning

The vFire app uses the same partitioning rules as the vFire Self Service portal.

Access Permissions

The app uses the security role and other permissions set for the user or analyst in vFire Core.

User App Permissions

If the login is as a user, they can **log calls**, and view their **calls**, **approvals**, **orders** and **assets**. App user permissions are determined by the settings in the **Options Tab** in the user's **Self Service Portal role**.

To log calls, users must have **Log Calls** selected in the **Options Tab** of your **Self Service Portal** role.

Access to call templates when logging calls is determined by the permissions in the **Call Templates** tab of the user's **Self Service Portal** role, and, if used, by the **stream** and **status** of the call.

> When a call is logged via the app, the logging method will be declared as 'Portal'.

To see a service, the user must:

- Have a stakeholder role, and **Review Own Services** selected in the **CMDB** tab of their **Self Service Portal** role to see their own services.

- Have **Review All Services** selected in the **CMDB** tab of their **Self Service Portal** role to see all or their organization's services.

- Be the user specified in the **User** field on the **Service Details** window.

To see an asset, the user must:

- Have a stakeholder role, and **Review Own CIs** selected in the **CMDB** tab of their **Self Service Portal** role to see their own assets.

- Have **Review All CIs** selected in the **CMDB** tab of their **Self Service Portal** role to see all or their organization's assets.

- Be the user specified in the **User** field on the **CI Details** window.

Analyst App Permissions

If the login is as an analyst, they can view their page 32, and details of page 34assigned or forwarded to them. They can page 35 to another analyst or group, page 37, review page 35, change the status or page 38.

Their security permissions are taken from the settings in their

Further Information

Product Information and Online Support

For information about Alemba products, licensing and services, visit **www.alemba.com**.

For release notes and software updates, go to **www.alemba.help**.

Up-to-date product documentation, training materials and videos can be found at **www.alemba.help/help**.

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

Technical Support

For technical support, please visit: **www.alemba.com** and select the **vfire 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.