

# MSP Onboarding

Typically, as a Managed Service Provider (MSP), onboarding your customer for a service integration will take weeks to complete. With the **MSP Onboarding Automation** feature, the integration process is automated, lessening the time to onboard your customers.

See how easy onboarding your customers can be by following the instructions below!

**NOTE:** With the installation of the MSP Onboarding Automation feature, the following two custom tables will be installed:

- u\_psp\_msp\_customer
- u\_psp\_msp\_customer\_endpoint

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## Installation

There are two main update sets used for the MSP Onboarding feature. One is for the MSP instance while the other is installed onto the customer instance.

Instructions for MSP Instance:

1. [Install the Perspectium update sets to your ServiceNow instance](#) **in the following order:**
  - a. Perspectium Core (Iodine 7.0.0 or above)
  - b. Perspectium Common Endpoint
  - c. Any additional Common Document update sets for ITSM process you wish to integrate:
    - Perspectium Common Incident Iodine
    - Perspectium Common Change Iodine
    - Perspectium Common Knowledge Iodine
    - Perspectium Common Problem Iodine
    - Perspectium Common Request Iodine
2. Install the latest **Perspectium for MSP Iodine 7.0.0** update set.
3. Preview and commit all update sets

Instructions for Customer Instance:

1. [Install the Perspectium update sets to your ServiceNow instance](#) **in the following order:**
  - a. Perspectium Core (Iodine 7.0.0 or above)
  - b. Perspectium Common Endpoint
  - c. Any additional Common Document update sets for ITSM process you wish to integrate:
    - Perspectium Common Incident Iodine
    - Perspectium Common Change Iodine
    - Perspectium Common Knowledge Iodine
    - Perspectium Common Problem Iodine
    - Perspectium Common Request Iodine
2. Install the latest **Perspectium for MSP Customer Iodine 7.0.0** update set.
3. Preview and commit all update sets.

If domain separation is required, make sure to install the **Service Catalog - Domain Separation** plugin. For more information, click [here](#).

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# Getting Started

**servicenow**

System Administrator

**perspectium**

### Onboarding

Onboard a customer and set up a service integration.

To get started, select a customer and go through the following:

1. Select a company record that represents your customer in Company. If you do not have an existing Company record, you can create one by clicking the search icon, then click **New**.
2. Set a key identifier for your customer in Customer Key. These values will be used as queue credentials for the new shared and subscribed queues created for this customer.
3. Set a queue username and password for your customer. These values will be used as queue credentials for the new shared and subscribed queues created for this customer.
4. If you have domain separation enabled, a field will appear called Domain under System Properties. Set the domain that your customer belongs to in this field. If you do not have an existing Domain record, you can create one by clicking the search icon, then click **New**. For more information on domain separation, click [here](#).

Once completed, a request will be sent to the Perspectium Support Portal to create the queue credentials based on your input.

#### Company\*

#### Credentials

Customer Key\*

Create Username\*

Create Password\*

Confirm Password\*

Create a password to connect to the Perspectium Integration Mesh. The password must contain the following:

- At least 8 characters
- At least one uppercase letter
- At least one lower case letter
- At least one special character
- No whitespaces

Passwords match

Next

## Setup Provisioned User

Before creating a new customer, you must first set up a provisioning user. A provision user will have the correct credentials and privileges to create new customer shared and subscribe queues. You will only need to do this process once.

The provision user credentials are provided by [Perspectium Support](#).

1. Navigate to **Perspectium > Control and Configuration > Properties**. Click on **MSP Onboarding Settings**.
2. Once on the **MSP Onboarding Settings** page, fill in the provision user's username and password.  
 **NOTE:** The provisioning user's username and password is different from the Perspectium Integration Mesh username and password.
3. Click **Save**.

You will now be able to automatically create a new queue user each time a new customer is onboarding.

## Creating a New Customer

To start onboarding a new customer:

1. Go to **Perspectium MSP > Customers > Onboard New**. You will be directed to a guided wizard that will guide you through the process of setting up a new customer.
2. On the first **Step 1** page, the following fields will appear:

Field	Description
Company	This is a reference to the customer Company record. If you do not have an existing Company record, you can create one from here.
<b>Credentials</b>	
Customer Key	The key identifier for this particular customer. We recommend this field be set to lower case values.

Create Username	The customer queue username
Create Password	<p>The customer queue password</p> <p>The password must contain the following:</p> <ul style="list-style-type: none"> <li>• At least 8 characters</li> <li>• At least one uppercase letter</li> <li>• At least one lower case letter</li> <li>• At least one special character</li> <li>• No whitespaces</li> </ul>
Confirm Password	Re-enter the queue password
<b>System Properties</b>	
Domain	<p>The domain this customer belongs to. If you do not have one selected, you can create a new one here.</p> <p><b>NOTE:</b> If your instance does not have domain separation, this option is hidden.</p>

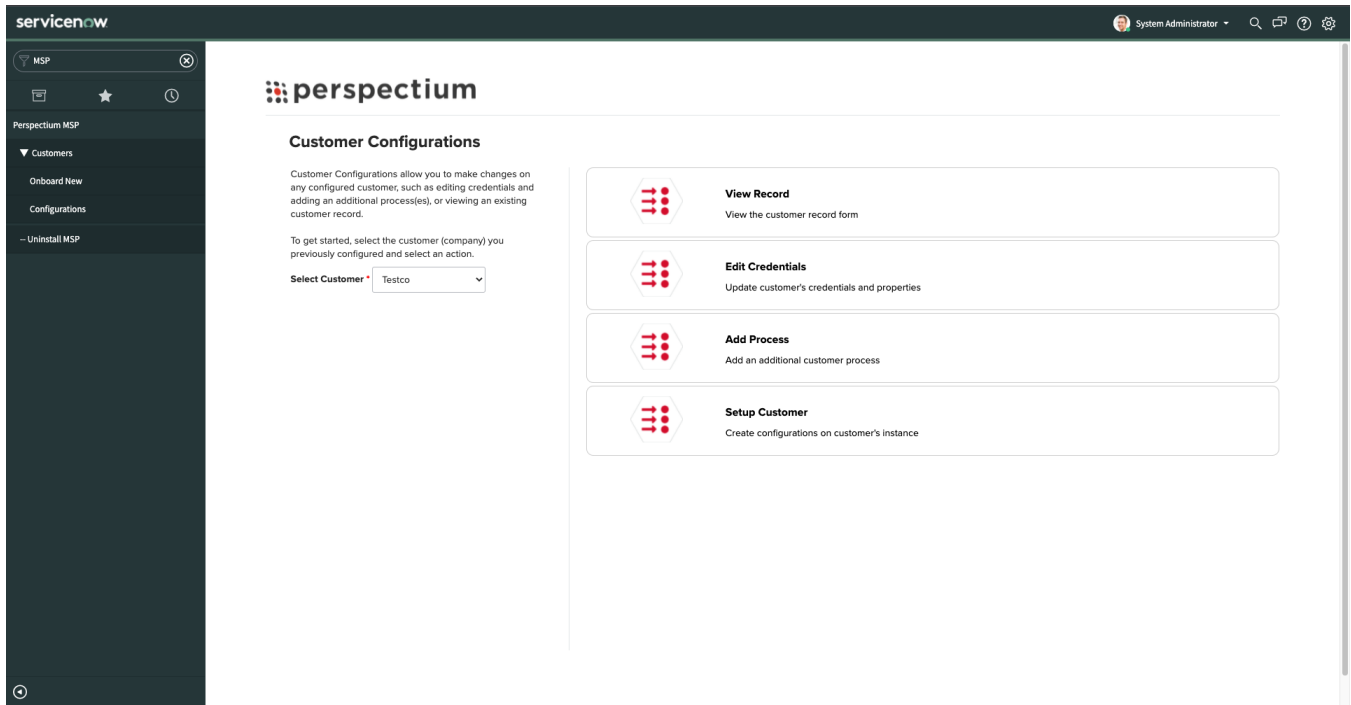
3. On **Step 2**, you will be prompted to set a process and define any table or transform maps:

Field	Description
Process	The initial table process that the customer will include. See the <b>Adding Additional Process</b> section for more details on which tables can be included as a process.
Table Map Template	Select a table map as a template for this customer. The application will make a copy of the selected table map and append the customer name to the end after finalizing.
Transform Map Template (Optional)	<p>Select a transform map as a template for this customer. The application will make a copy of the selected transform map and append the customer name to the end after finalizing. A transform map is not required.</p> <p><b>NOTE:</b> If you do not see your table or transform map listed, you can click the <b>Manage Template</b> link to add it from the pop-up interface.</p>

4. Finally, you will be prompted to review your configuration on Step 3. If you would like to make any changes, click the **Back** button and make the changes accordingly. You can also click on the progress bar steps to go to the desired step.
5. Click **Save**. Allow the application some time to set up all the required changes.

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## Configure Existing Customers



## View Customer Configuration

This section allows you, the MSP user, to view the configurations of your existing customers.

1. Go to **Perspectium MSP > Customers > Configurations**.
2. In the **Select Customer** dropdown, click on the customer record you would like to view and click **View Record**.  
On the customer record form, you can view the fields associated with the select customer, as well as the process this customer has. Modifications can be made to any reference field from here.

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## Edit Queue Credentials

This section allows you, the MSP user, to edit the configurations of your existing customers.

1. Go to **Perspectium MSP > Customers > Configurations**.
2. In the **Select Customer** dropdown, click on the customer record you would like to edit and click **Edit Credentials**
3. Make any necessary changes on the following fields:

Field	Description
Company	This is a reference to the customer Company record. This cannot be changed here.
<b>Credentials</b>	
Customer Key	The key identifier for this particular customer. We recommend this field be set to lower case values. <b>NOTE:</b> Changing this value will change the queues' name and import set table label if it exists
Queue Username	The customer queue username
<b>System Properties</b>	
Domain	The domain this customer belongs to. If you do not have one selected, you can create a new one here. <b>NOTE:</b> If your instance does not have domain separation, this option is hidden.

4. Click **Save**. Allow the application some time to save the changes.

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## Add an Additional Process

This section allows you, the MSP user, to view existing process(es) for a given customer as well as add additional process(es).

The following tables are supported when adding a new process for a customer:

- Catalog Task
- Change Request
- Incident
- Knowledge
- Problem
- Request
- Requested Item
- Task
- User

1. Go to **Perspectium MSP > Customers > Configurations**.
2. In the **Select Customer** dropdown, click on the customer record you would like to edit and click **Add Process**.
3. Click **Add New Process** to open a new section.
  - a. Select the process type you would like to create.
  - b. Similar to the guided wizard, you will be able to select from a list of existing table and transform maps.
  - c. If you would like to add any additional templates, the **Manage Template** option is available as well.
4. Click **Save**.

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## Setup Customer

This section allows you, the MSP user, to setup a customer to integrate an ITSM process with.


1. Go to **Perspectium MSP > Customers > Configurations**.
2. In the **Select Customer** dropdown, click on the customer record you would like to setup and click **Setup Customer**.
3. Select an ITSM process you want to integrate with your customer with in the **Process Type** field. If you want to share all of the configurations, select **All**.
4. Select shared queue that you would like to use to share out the configurations in the **Shared Queue** field.
5. Click **Submit**.
6. You will see a message saying "Scheduled job to send out configuration messages". In the **Outbound Message** table, messages with topic **config** and type **msp** are being created and sent out.

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## Retrieve Customer Configurations

Once you finished the steps for **Setup Customer**, you can then go on to your customer's instance to set up a subscribed queue to retrieve the configurations.

 Before you begin, make note what queue you used to share out the configurations, as well as the queue username, queue password, and encryption key.

1. Go to **Perspectium > Perspectium Core > Subscribed Queues**.
2. Click on **New** and fill in the **Queue name**, **Queue username**, **Queue password**, and **Encryption key**. This should match the queue you used to share out the configurations.
3. Check the **Active** box.
4. Click **Submit** and the configurations would start being retrieved and created on to the instance.

5. Verify the configurations are created and make any changes necessary for your workflow.

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## Uninstalling

In the case where you no longer wish to have the Perspectium MSP Onboarding installed on your instance here are some steps to completely remove the feature:

1. Navigate to **Perspectium MSP > Uninstall MSP**
2. Click **Confirm**.

**ⓘ NOTE:** Clicking the Confirm button will remove ALL existing customer related records and all configurations related to the customers. This cannot be undone.

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