



Configuring iSupport[®] Service Catalog Functionality

Service Catalog functionality is available if you have the Service Desk edition; it enables customers to request services, products, policies/procedures, etc. utilizing Change and Purchase templates.

Configuration Overview

Basic Configuration

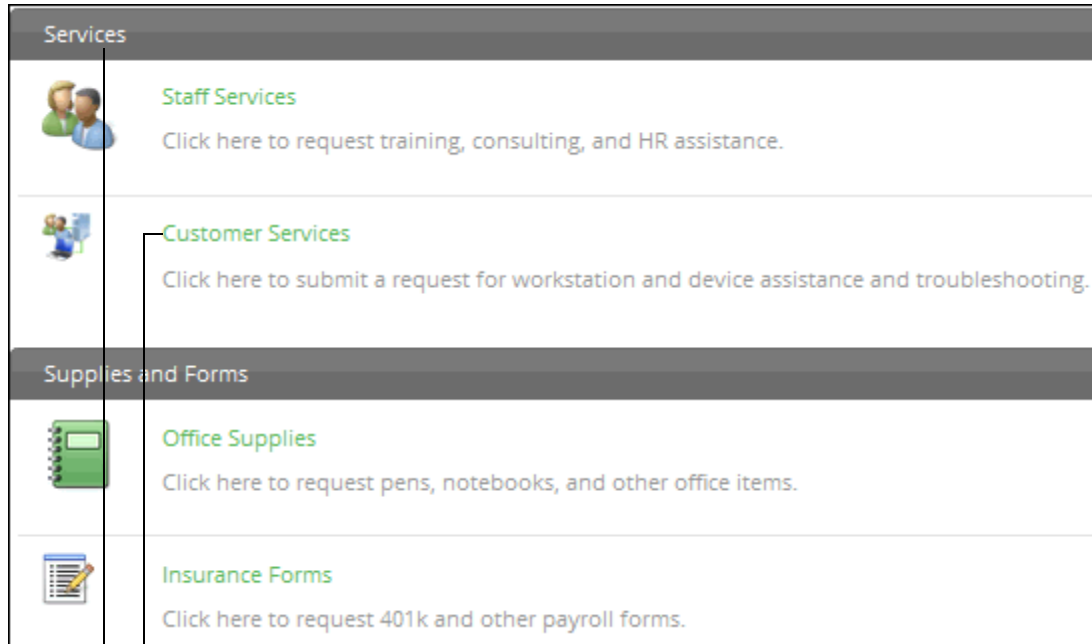
- Enable/disable Service Catalog functionality via the Feature Basics screen.
- If configuring service requests to generate purchase orders and Change records, create purchase templates and change templates to associate with service catalog entries. See the online help for more information.
- Use the Service Catalog Section screen to create a section of request entries for display on the Desktop and mySupport portal. See ["Creating Service Catalog Section Entries" on page 2](#) for more information.
- If displaying a service catalog section or service catalog to customers, use the mySupport | mySupport Navigator screen to add the service catalog as a link on the mySupport portal. See the online help for more information.
- If associating costs with services, control display of those costs to customers via the Can View Service Costs field in the Customer Profile screen (accessed via the Desktop menu) and Customer Profile views on the Desktop. See the online help for more information.

Creating Service Catalog Section Entries

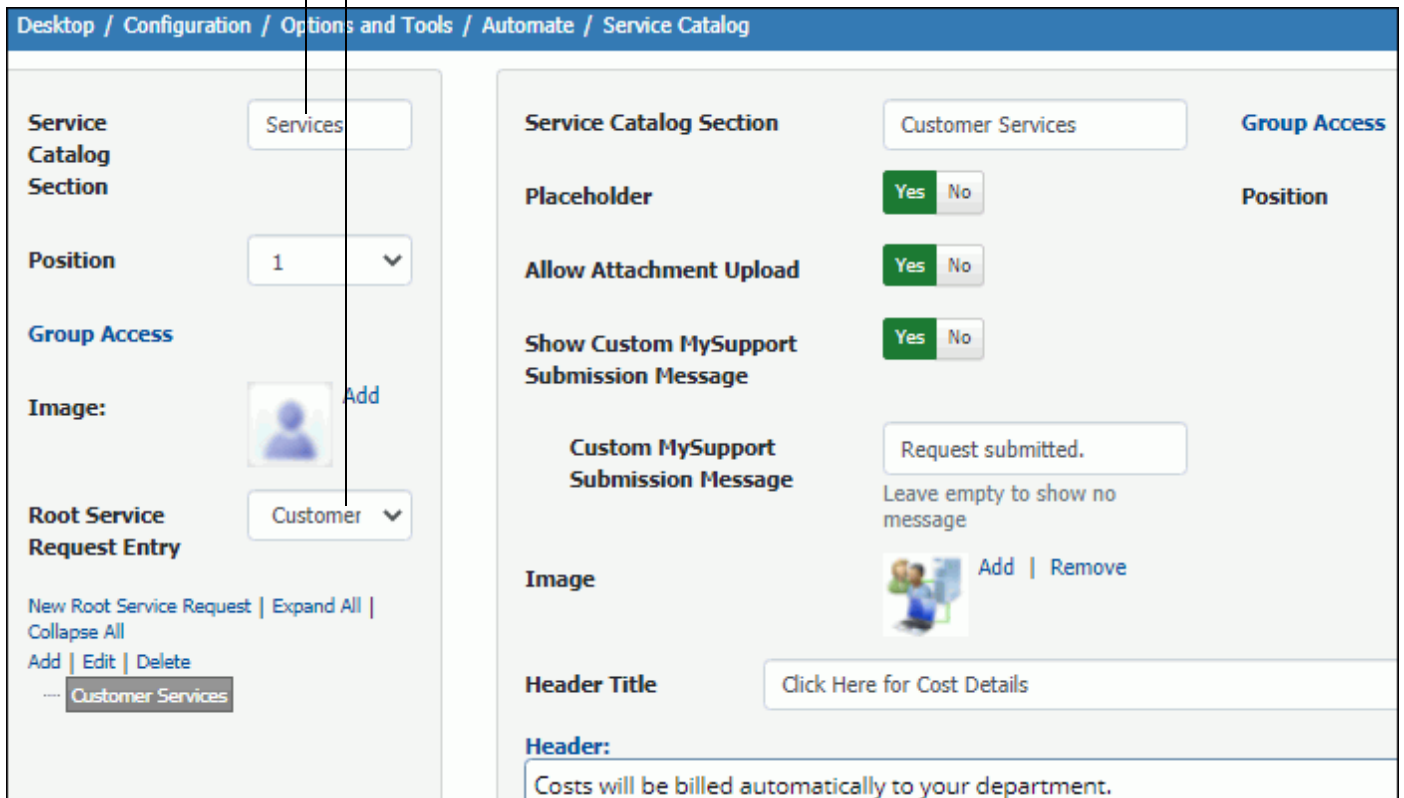
Use the Service Catalog Section screen to create a section of request entries for display on the Desktop and mySupport portal. Enter the section name and then click the Group Access link if you wish to restrict display of the section to selected support representative and customer groups.

Click the New Root Service Request link to create the top level entry; this entry will appear in the catalog screen. Complete the fields that appear on the right and click the Finish Edit button. To create a lower level entry, select an entry and click the Add link.

mySupport Service Catalog



Catalog Section Configuration Screen



Name - Enter the text to appear for the entry. If it is a root service request entry, the name will display in the catalog section on the Desktop and mySupport portal.

If it is a lower level request entry, the name will display in the request screen as shown below.

The screenshot shows a 'Customer Services' section with a list of items. A callout box labeled 'Lower level request entry names' points to the 'Laptop - Windows (\$100.00)' item. To the right, a detailed view of this item shows:

- Name:** Laptop - Windows
- Associated Cost:** \$100.00
- Description: Run complete diagnostic test, install company applications.
- Attachment area: To attach a file, drag and drop the file or click Select File. A 'Select File' button and a 'Drop file here to upload' area are visible.

Placeholder - Select Yes to display the entry without a link, custom fields, configuration item, or associated Change or Purchase template.+

Catalog Section Configuration Screen

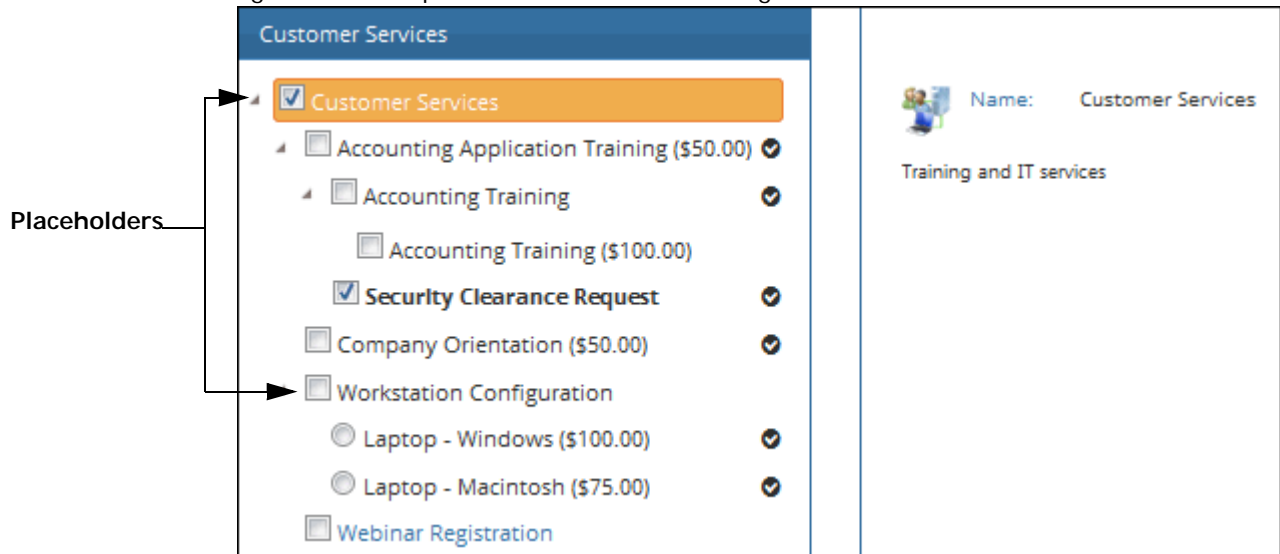
The configuration screen is split into two main panels. The left panel shows:

- Service Catalog Section:** Services
- Position:** 1
- Group Access:** (empty)
- Image:** Add | Remove
- Root Service Request Entry:** Customer Serv
- Buttons: New Root Service Request | Expand All | Collapse All | Add | Edit | Delete
- Tree view: Customer Services, Accounting Application Training

 The right panel shows:

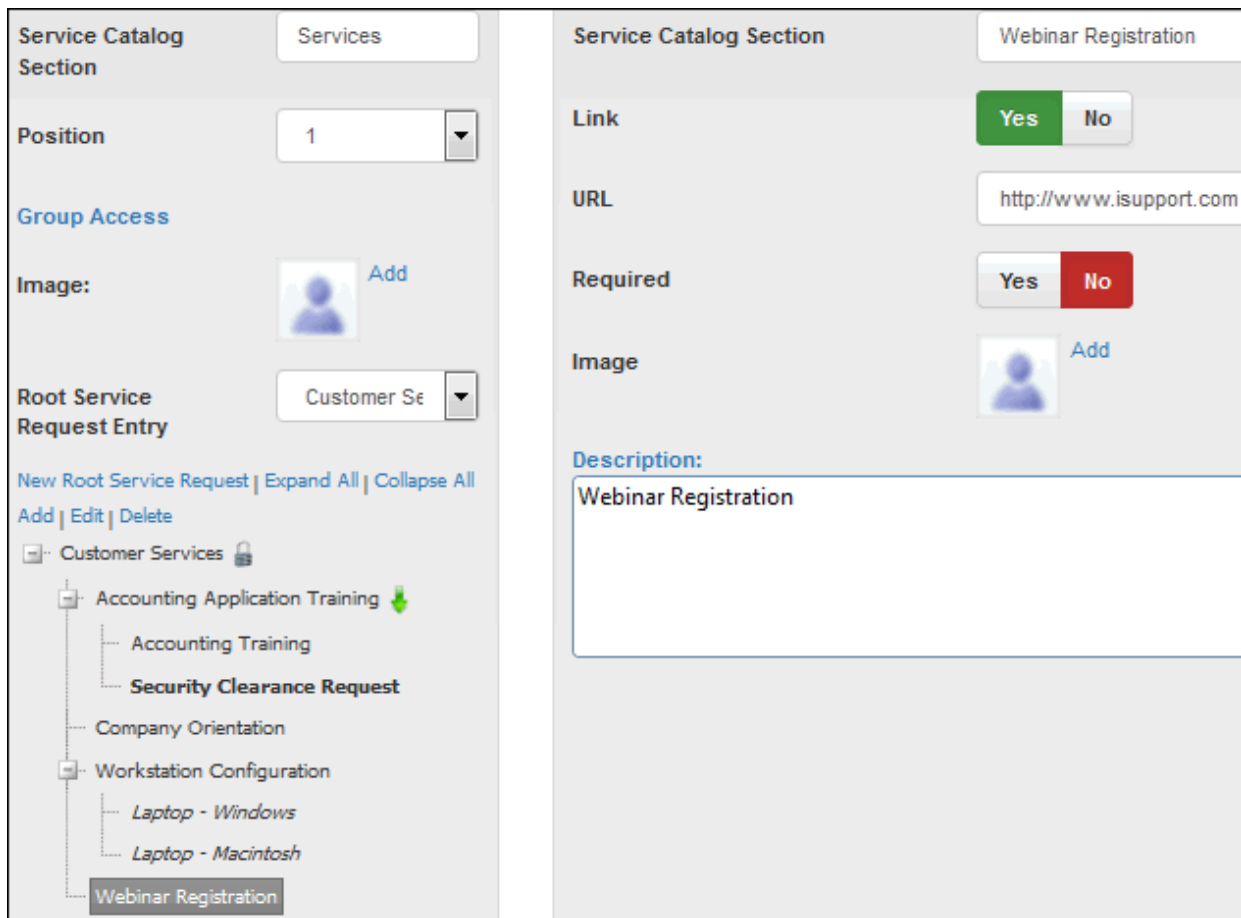
- Service Catalog Section:** Customer Services
- Placeholder:** Yes (selected) | No
- Allow Attachment Upload:** Yes | No
- Show Custom MySupport Submission Message:** Yes | No
- Image:** Add | Remove
- Header Title:** Click Here for Cost Details
- Header:** Costs will be billed automatically to your department.

The placeholder will appear as in the following example in the Request screen. The name will appear in the tree on the left and the name, image, and description in the frame on the right.

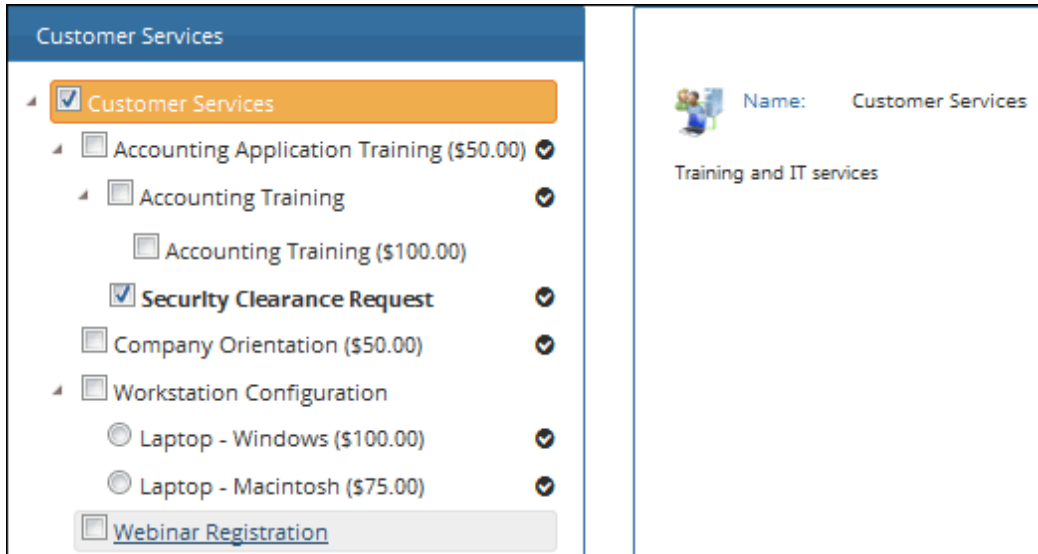


Link/URL - Select Yes to display the entry as a link that will display a web page when clicked. Then enter the URL of the web page to appear.

Catalog Section Configuration Screen



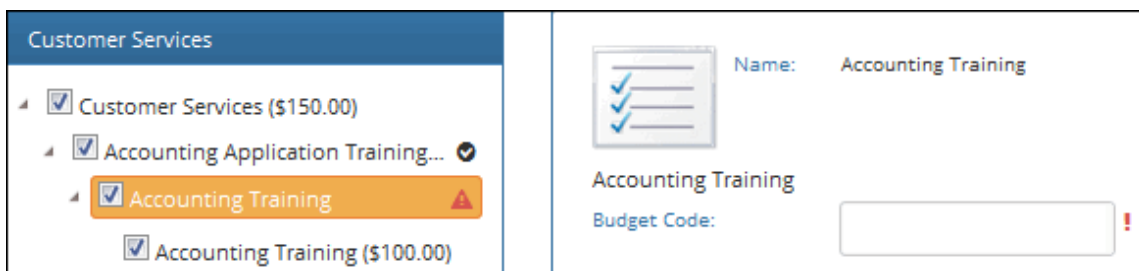
The entry will appear as a link that will display a web page when clicked.



Template Type/Template - If the entry is not a link or placeholder, select the type of template (Change or Purchase Request) that will create a record if the entry is selected. Then select the predefined Change or Purchase Request template. Any configured Change or Purchasing custom fields will display on the service request screen when the entry is selected. An exclamation point icon will appear if the custom fields are required in order to submit the request.

Service Request

Purchase Custom Field

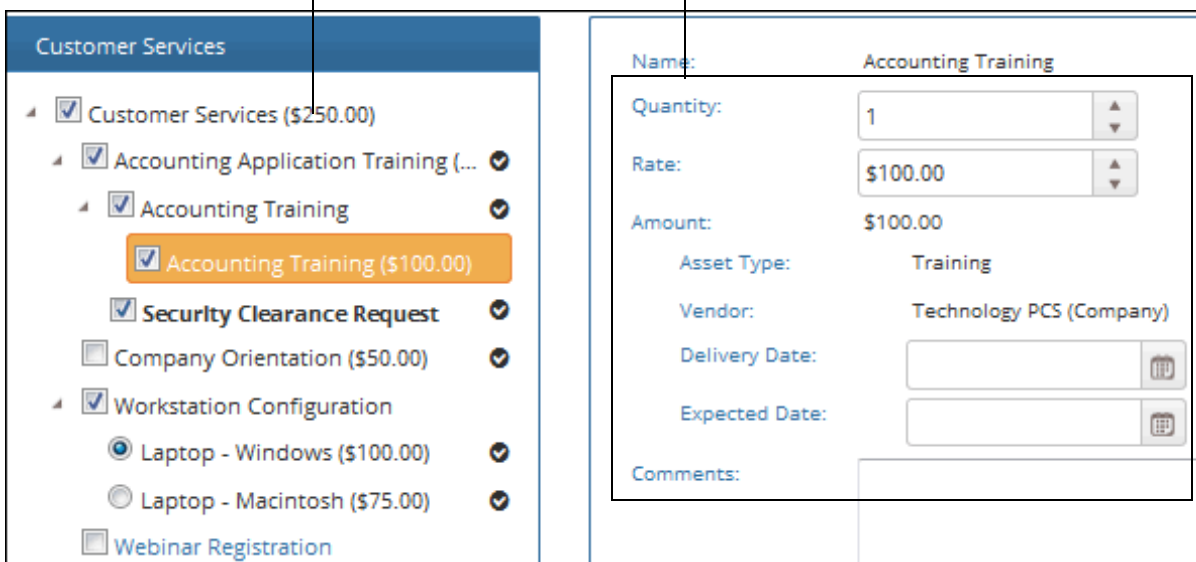


If you select a purchase request template, the line items in the template will appear on a separate line to the user. The Total Cost amount will include the dollar amount of selected line items.

Service Request

Total Cost includes line item amounts

Line item from Purchase template



Required - Select Yes to require the entry to be selected before the request can be submitted. Required entries are displayed in bold.

Service Request

Required entry

Customer Services

- Customer Services**
- Accounting Application Training (\$50.00)
- Accounting Training
 - Accounting Training (\$100.00)
- Security Clearance Request***

Name: Customer Services

Training and IT services

Radio Button - This field appears if the entry is not a root service request entry. Entries appear with checkboxes by default; select Yes to display the entry as a radio button. If you designate an entry as a radio button option as shown in the example below, all entries at the same level must be radio button entries. Radio button entries appear in italics in the tree on the left in the Service Catalog Section Configuration screen.

Catalog Section Configuration

Service Catalog Section: Services

Position: 1

Group Access: Add

Image: Add

Root Service Request Entry: Customer

New Root Service Request | Expand All | Collapse All

Add | Edit | Delete

- Customer Services
 - Accounting Application Training
 - Accounting Training
 - Security Clearance Request***
 - Company Orientation
 - Workstation Configuration
 - Laptop - Windows***
 - Laptop - Macintosh*
 - Webinar Registration

Service Catalog Section: Laptop - Windows

Placeholder: Yes No

Link: Yes No

Template Type: Change Purchase

Template: Configur + Edit

Required: Yes No

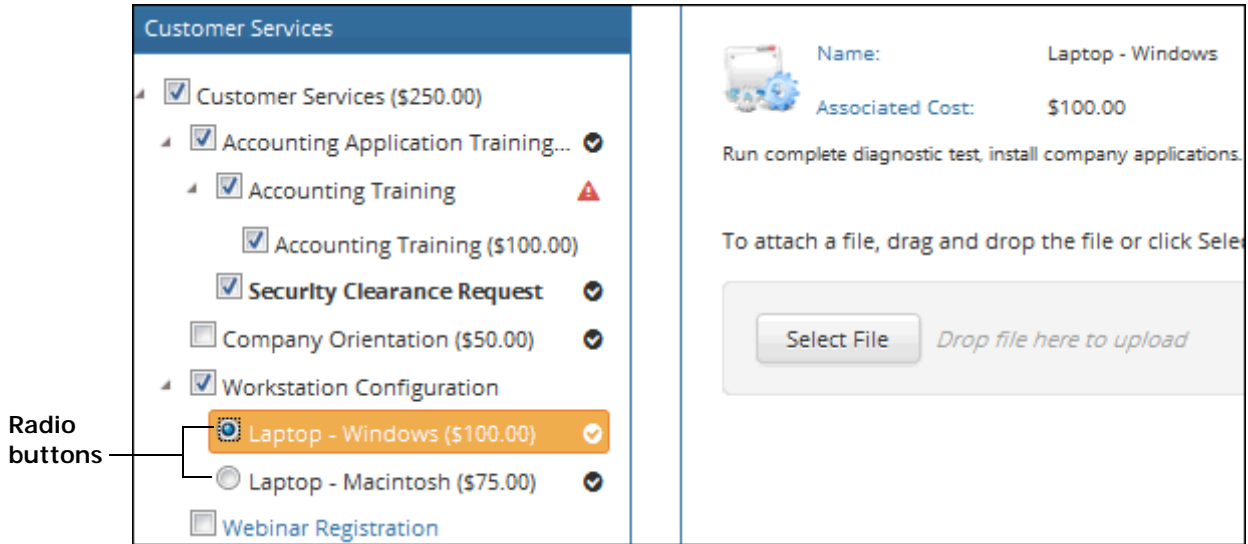
Radio Button: Yes No

Image: Add Remove

Description: Run complete diagnostic test, install company applications.

The radio button will appear as follows in the Service Request Screen:

Service Request



Allow Attachment Upload - Select Yes to display a field to attach a file to a request. If No is set in the Allow Attachment Upload field, the field would only display if the configured template had file(s) attached.

Show Custom mySupport Submission Message - Select Yes to display custom text that will appear after a request has been submitted via a mySupport portal.

Image - Click the Add link to select an image to appear when the request is selected.

Catalog Section Configuration Screen

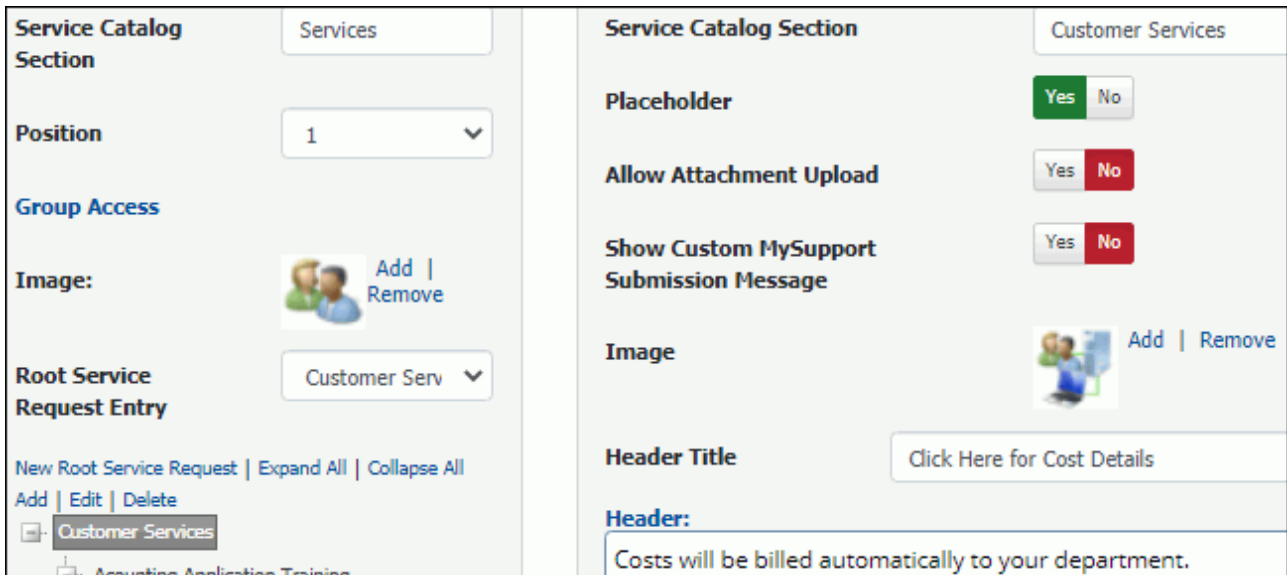
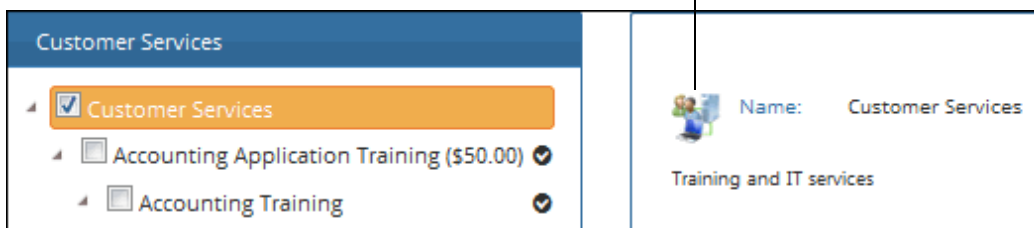
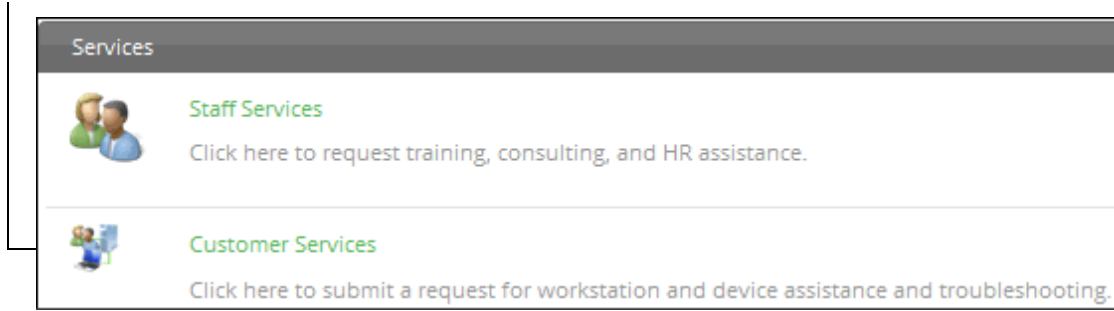


Image in Service Request Screen



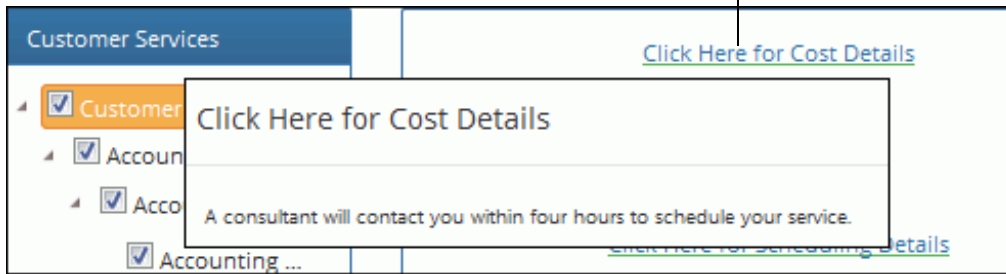
If it is a root service entry, this image will appear next to the entry as shown in the example below.

Image in Catalog Screen

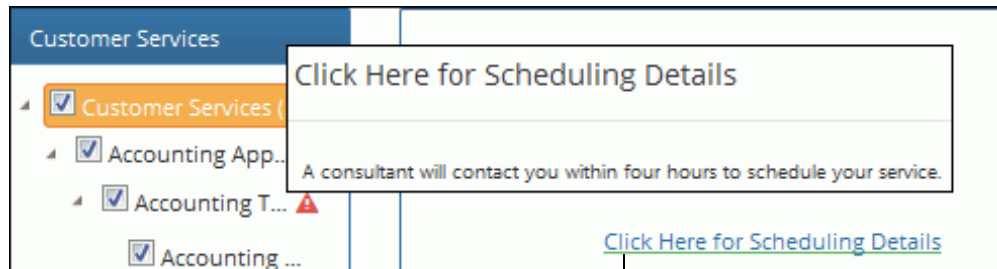


Header Title/Header - These fields appear if the entry is a root service request entry. In the Header Title field, enter the text to appear as a link above the line detail. In the Header field, enter the text to be included in the dialog.

Header in Service Request Screen



Footer Title/Footer - These fields appear if the entry is a root service request entry. In the Footer Title field, enter the text to appear as a link at the bottom of the service request screen. The link will display a dialog as shown in the example below. In the Footer field, enter the text to be included in the dialog.



Footer in Service Request Screen

Configuration Item - Select the configuration item to associate with the Change or Purchase Request record that is created when the request is submitted.

Associated Cost - Enter a dollar amount to appear next to the entry when the entry is clicked if the Can View Service Cost field in the customer's Profile record is enabled. The Total Cost amount includes the cost of all selections (including line items from purchase templates).

Service Request Screen

Total Cost

Customer Services

- Customer Services (\$150.00)
 - Accounting Application Training (\$50.00)
 - Accounting Training
 - Accounting Training (\$100.00)
 - Security Clearance Request
 - Company Orientation (\$50.00)

Associated Cost

Name: Accounting Application Training
 Associated Cost: \$50.00
 Depends on Closure of: Security Clearance Request

To attach a file, drag and drop the file or click Select File to choose

Select File *Drop file here to upload*

The entry would appear as follows to a customer with the Can View Service Cost field disabled:

Customer Services

- Customer Services (\$150.00)
 - Accounting Application Training
 - Accounting Training


Name: Accounting Application Training
 Depends on Closure of: Security Clearance Request

Group Access - Click this link to restrict display of the entry to members of support representative and customer groups. In the Group Access dialog that appears, click the Add link to display a dialog for selecting the groups. **After you add one or more groups and save, the entry will display only to members of the selected groups.**




Group Access

Select Support Rep Groups Select Customer Groups

| | Name ▲ | Description |
|-------------------------------------|--------------------|--|
| <input type="checkbox"/> | Accounting | Members in the Accounting department |
| <input type="checkbox"/> | Administrators | Members of the Administration team |
| <input checked="" type="checkbox"/> | Platinum Support | Customers with Platinum Support agreements |
| <input type="checkbox"/> | Production Control | Production staff |

After adding the group, it will appear in the Group Access field as shown below. A  lock will appear next to the entry in the tree on the left. **After you add one or more groups and save, the entry and its lower level entries will display only to members of the selected groups.**


Catalog Section Configuration Screen

| | |
|---|---|
| <p>Entry with group access</p> <p>Service Catalog Section: Services</p> <p>Position: 1</p> <p>Group Access:  Platinum Support (Customers)</p> <p>Image:  Add Remove</p> <p>Root Service Request Entry: Custom</p> <p>New Root Service Request Expand All Collapse All Add Edit Delete</p> <ul style="list-style-type: none"> Customer Services <ul style="list-style-type: none"> Accounting Application Training Accounting Training Security Clearance Request Company Orientation | <p>Entry will display only to selected groups</p> <p>Service Catalog Section: Customer Services</p> <p>Group Access: Platinum Support (Customers)</p> <p>Placeholder: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Position: 2</p> <p>Allow Attachment Upload: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Show Custom MySupport Submission Message: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Image:  Add Remove</p> <p>Header Title: Click Here for Cost Details</p> <p>Header: Costs will be billed automatically to your department.</p> <p>Footer Title: Click Here for Scheduling Details</p> |
|---|---|

Position - Select the number for the position of the entry in the tree for the root service request. The first position is at the top of the tree.

Description - Enter the text to appear as shown below when the entry is selected.

Description in Service Request Screen

| | |
|--|--|
| <p>Customer Services</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Customer Services <input type="checkbox"/> Accounting Application Training (\$50.00) ✓ <input type="checkbox"/> Accounting Training ✓ | <p> Name: Customer Services</p> <p>Training and IT services</p> |
|--|--|

Adding Dependencies to Request Entries

After saving a section with a lower level entry, a Dependencies link will appear for you to create a dependency between two entries; use this field to select a lower level entry that must be selected in order to select the current entry in the Service Request screen. The record created from the selected lower level dependency entry must be

closed in order for the record to be created from the upper level entry. A green down arrow icon will appear on the entry in the tree to the left in the Catalog Section Configuration screen.

This purchase request will not be created until the Change record created from its lower level dependency (Security Clearance Request) is closed

Lower level dependency

The screenshot shows the configuration interface for a service catalog section. On the left, a tree view under 'Customer Services' shows 'Accounting Application Training' with a green down arrow icon. The main configuration area includes fields for 'Service Catalog Section' (Accounting Application 1), 'Placeholder' (Yes/No), 'Link' (Yes/No), 'Template Type' (Change/Purchase), 'Template' (Accounting Application Training), 'Required' (Yes/No), 'Radio Button' (Yes/No), and 'Image'. The 'Dependencies' field is set to 'Security Clearance Request'. The 'Associated Cost' is \$50.00.

The dependency will appear as shown below in the Service Request screen:

Service Request Screen

This change must be closed in order for the Accounting Application Training purchase request to be created

The screenshot shows the 'Service Request Screen'. On the left, a list of services is displayed under 'Customer Services'. 'Accounting Application Training' (\$50.00) is highlighted in orange and has a checkmark icon. Below it are 'Accounting Training' (\$100.00) and 'Security Clearance Request'. On the right, the details for 'Accounting Application Training' are shown: Name: Accounting Application Training, Associated Cost: \$50.00, and a dependency: 'Depends on Closure of: Security Clearance Request'. There is a file upload area below the details.