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.
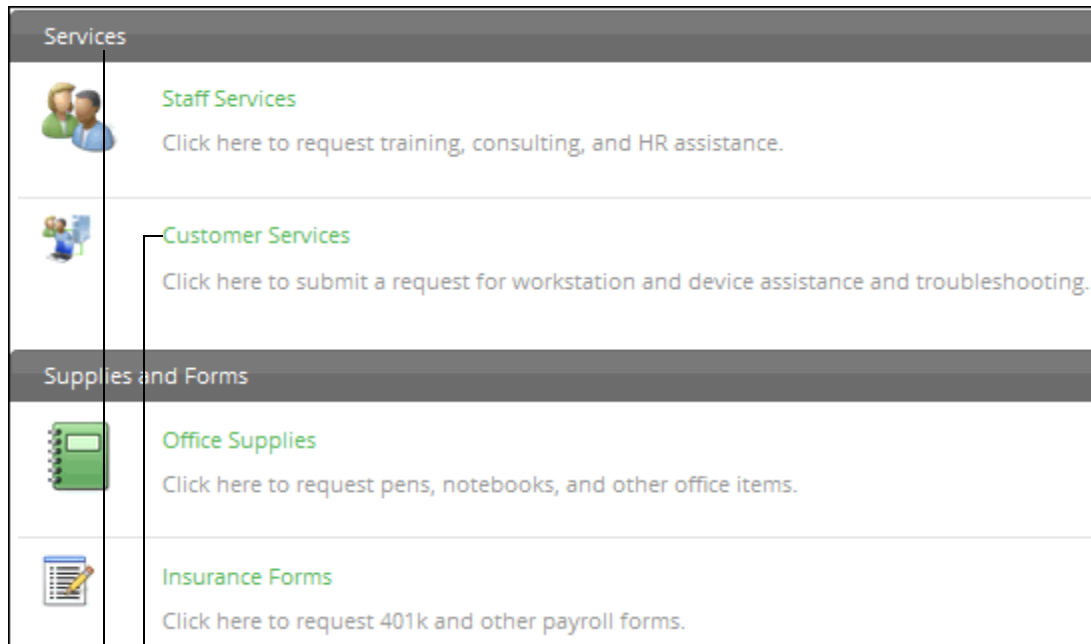
Overview

Basic Configuration

- Go to the Service Catalog tab in Core Settings | Feature Basics to **enable** this functionality.

- Go to Options and Tools l Automate | Templates to create **purchase** and **change templates** to associate with service catalog entries. See the online help for more information.

- Go to Options and Tools l Automate | Service Catalog to create a **section of request entries** for display on the Desktop and mySupport portal. See for more information.

- If displaying a 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.

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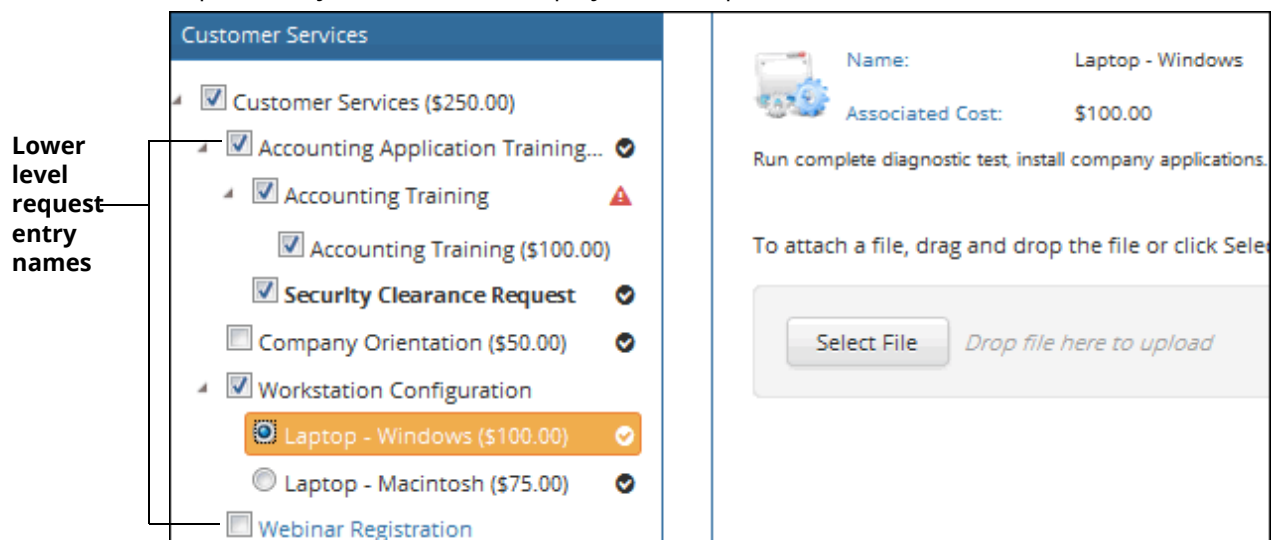
Placeholder - Select Yes to display the entry without a link, custom fields, configuration item, or associated Change or Purchase template.+

Catalog Section Configuration Screen
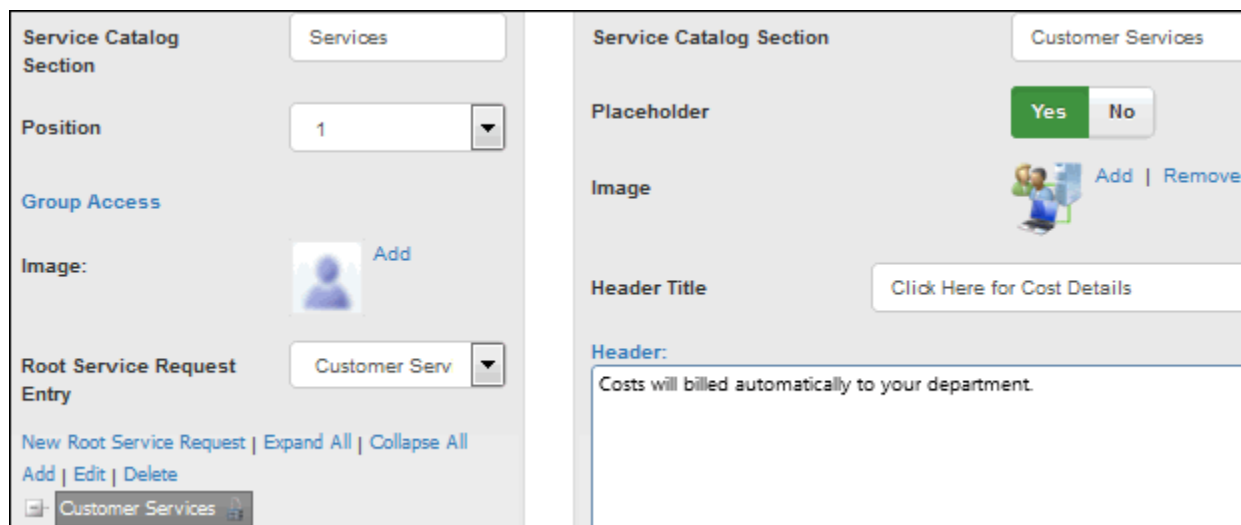
The placeholder will appear as follows in the Request screen. The name will appear in the tree on the left and the name, image, and description in the frame on the right.

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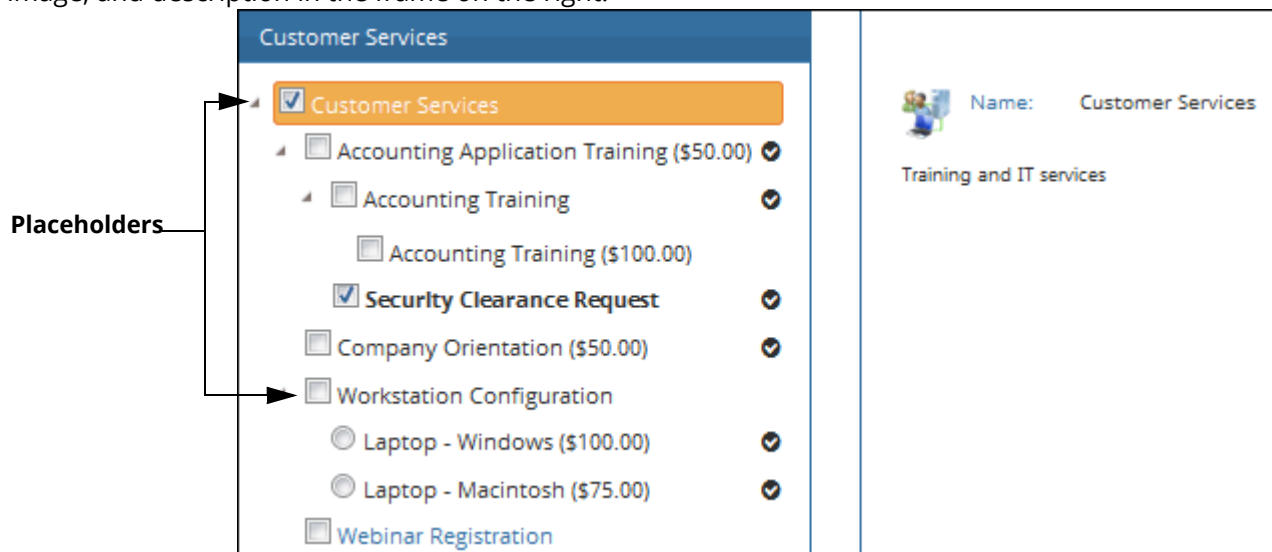
Link/URL - Select Yes to display the entry as a link that will display a web page when clicked. Then enter the URL of the web page to appear.

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

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

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

Service Request

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.
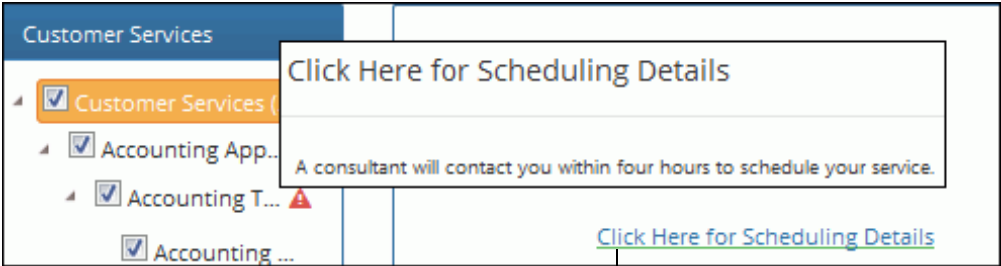
Footer in Service Request Screen

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
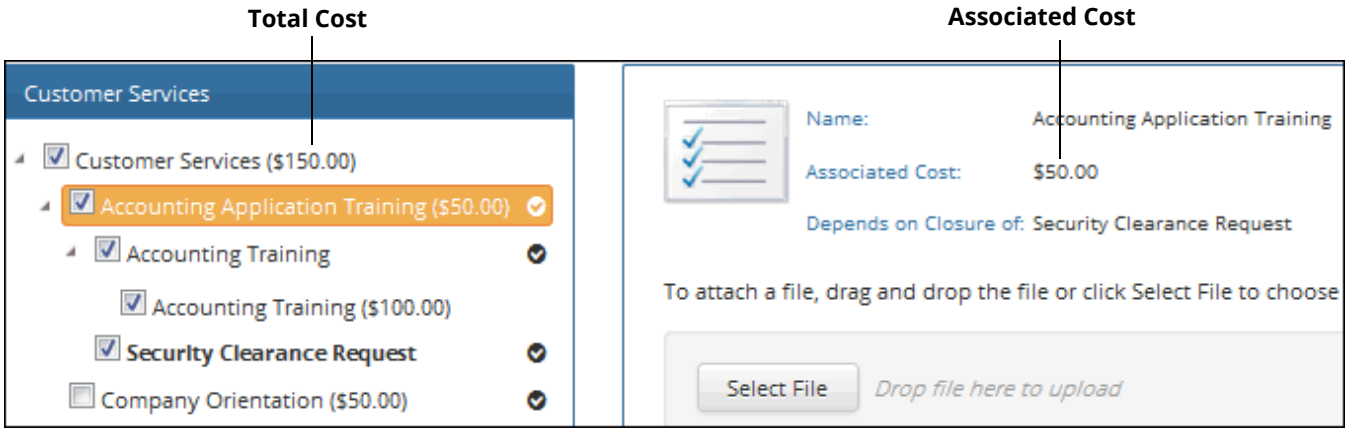
The entry would appear as follows to a customer with the Can View Service Cost field disabled:
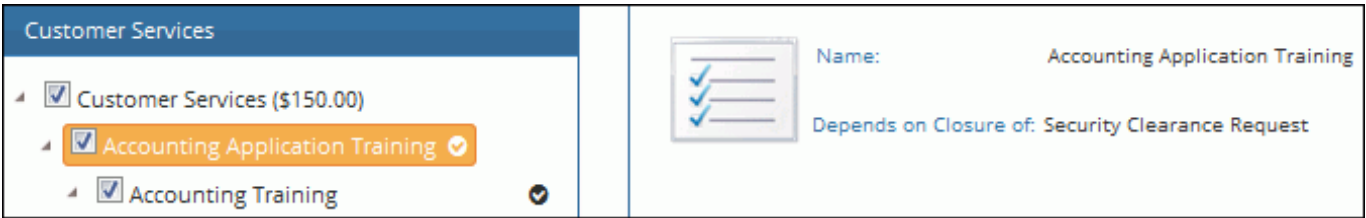
Group Access - Click this link to restrict display of the entry to members of support representative and customer groups. In the Group Access dialog that appears, click the Add link to display a dialog for selecting the groups. *After you add one or more groups and save, the entry will display only to members of the selected groups.*

After adding the group, it will appear in the Group Access field as shown below. A lock 🔒 icon 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

Entry with group access   **Entry will display only to selected groups**

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

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

<p align="center">Service Request Screen</p>

<p align="center">This change must be closed in order for the Accounting
Application Training purchase request to be created</p>

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