



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

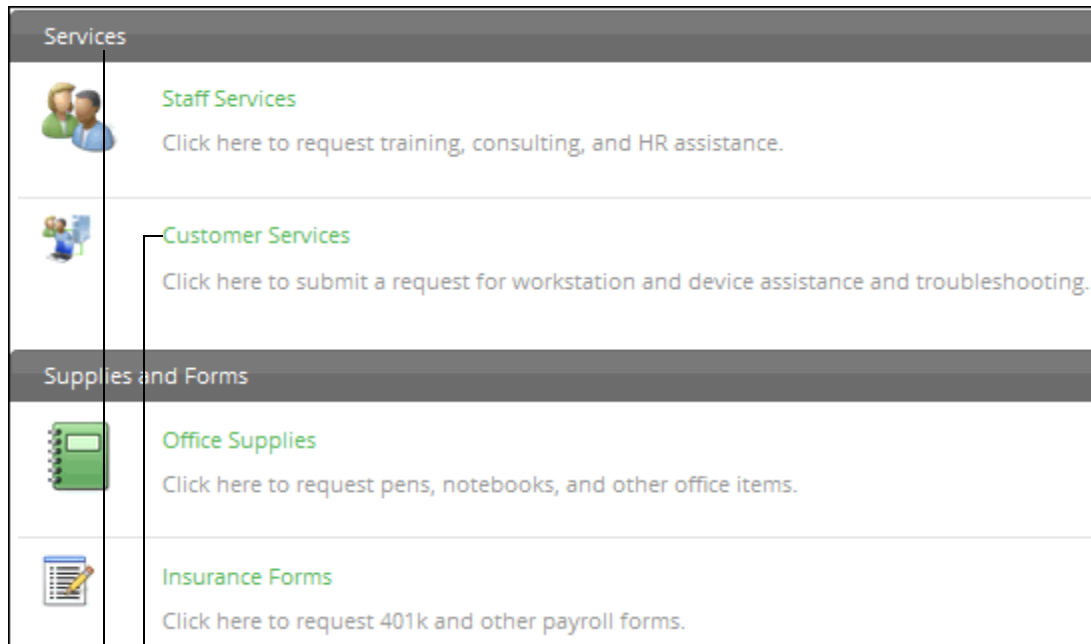
- Go to the Service Catalog tab in Core Settings | Feature Basics to **enable** this functionality.
- Go to Options and Tools | Automate | Templates to create **purchase** and **change templates** to associate with service catalog entries. See the online help for more information.
- Go to Options and Tools | Automate | Service Catalog 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 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

Service Catalog Section	Customer Services	Group Access
Position	Yes	Position
Image:		
Header Title	Click Here for Cost Details	
Header:	<div>Costs will billed automatically to your department.</div>	

Service Catalog Section: Services

Position: 1


Group Access: Add

Image: 

Root Service Request Entry: Custom

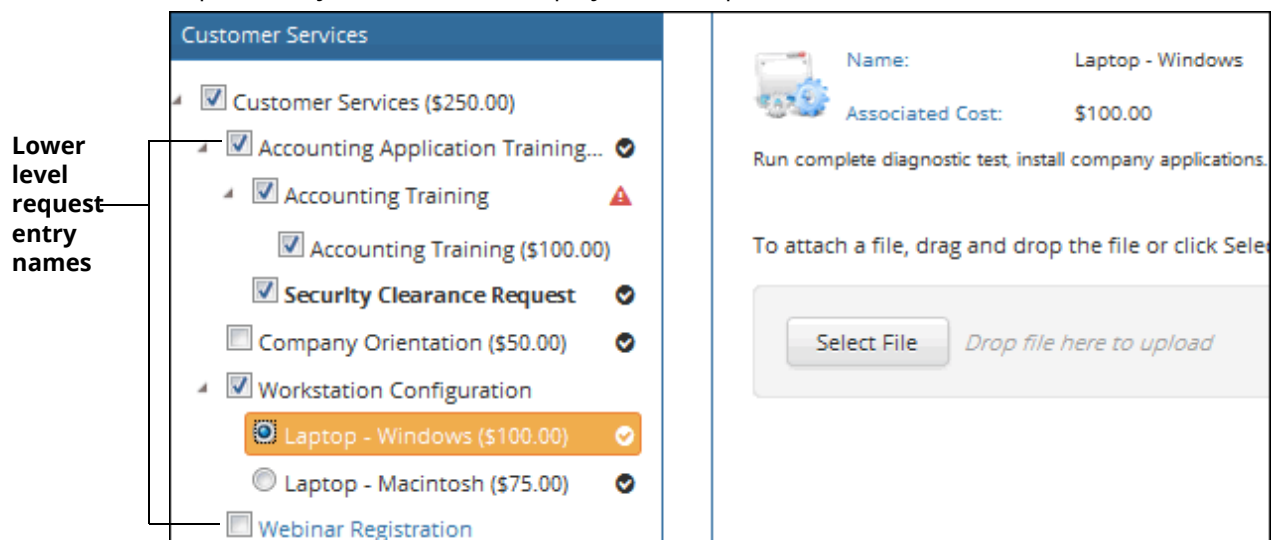
[New Root Service Request](#) | [Expand All](#) | [Collapse All](#)

[Add](#) | [Edit](#) | [Delete](#)

 Customer Services

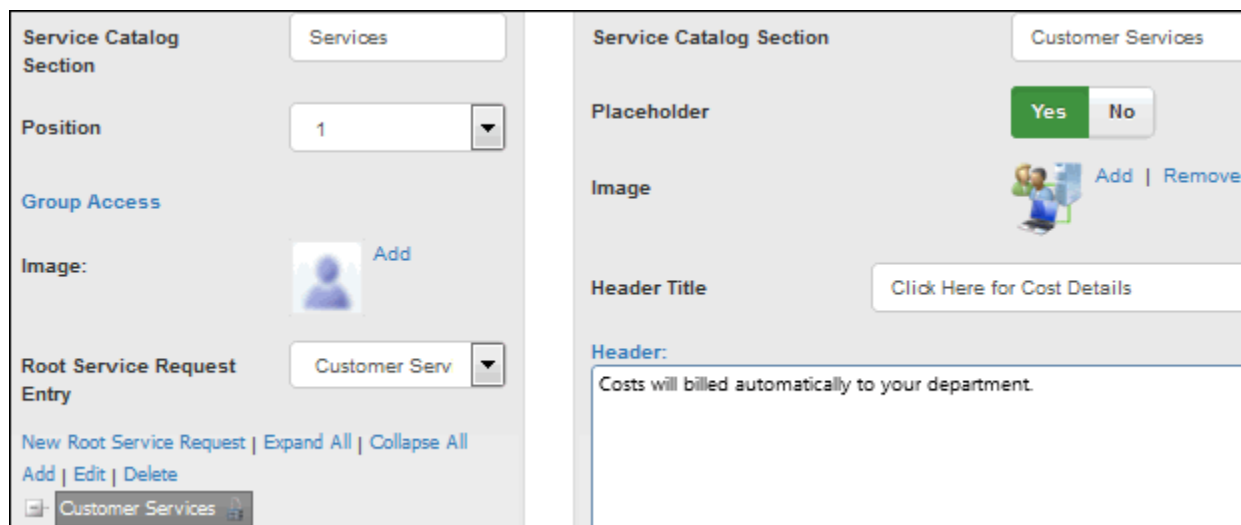
Name - Enter the text to appear for the entry. If it is a root service request entry, the name will display in the catalog section on the Desktop and mySupport portal.

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

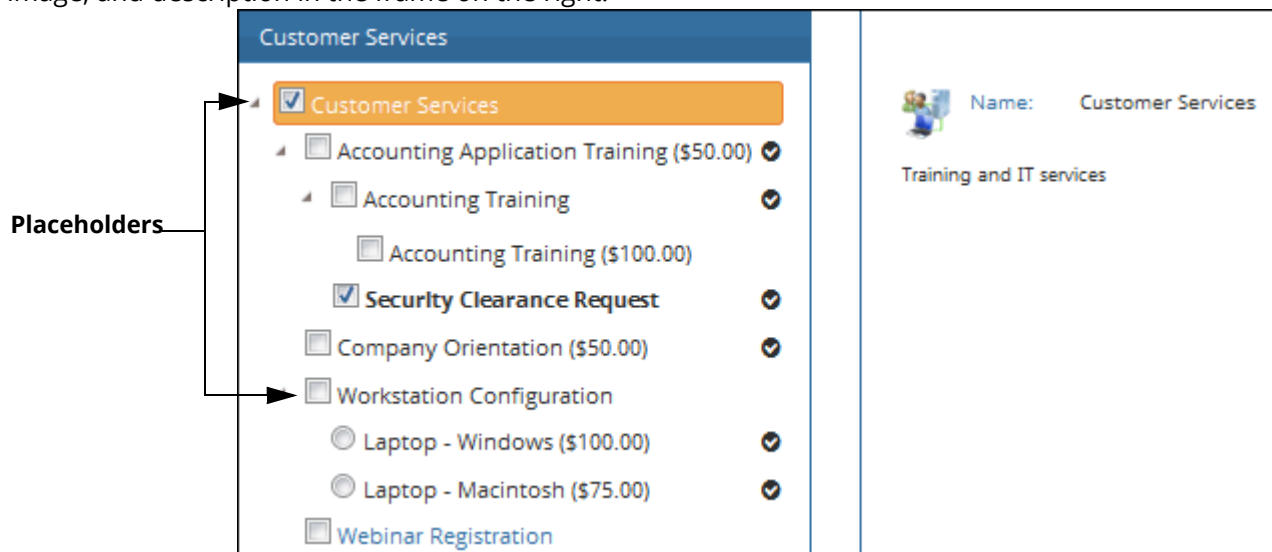


Placeholder - Select Yes to display the entry without a link, custom fields, configuration item, or associated Change or Purchase template.+

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.




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

Service Catalog Section	Services
Position	1
Group Access	
Image:	 Add
Root Service Request Entry	Customer Se
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	Webinar Registration
Link	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
URL	http://www.isupport.com
Required	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Image	 Add
Description: Webinar Registration	

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

Customer Services	
<input checked="" type="checkbox"/> Customer Services	 Name: Customer Services
<input type="checkbox"/> Accounting Application Training (\$50.00)	Training and IT services
<input type="checkbox"/> Accounting Training	
<input type="checkbox"/> Accounting Training (\$100.00)	
<input checked="" type="checkbox"/> Security Clearance Request	
<input type="checkbox"/> Company Orientation (\$50.00)	
<input type="checkbox"/> Workstation Configuration	
<input type="radio"/> Laptop - Windows (\$100.00)	
<input type="radio"/> Laptop - Macintosh (\$75.00)	
<input type="checkbox"/> Webinar Registration	

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

Customer Services

☒ Customer Services (\$150.00)

☒ Accounting Application Training...

☒ Accounting Training

☒ Accounting Training (\$100.00)

Name: Accounting Training

Accounting Training

Budget Code:

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

Customer Services

☒ Customer Services (\$250.00)

☒ Accounting Application Training (...)

☒ Accounting Training

☒ Accounting Training (\$100.00)

☒ Security Clearance Request

☐ Company Orientation (\$50.00)

☒ Workstation Configuration

☒ Laptop - Windows (\$100.00)

☒ Laptop - Macintosh (\$75.00)

☐ Webinar Registration

Name: Accounting Training

Quantity: 1

Rate: \$100.00

Amount: \$100.00

Asset Type: Training

Vendor: Technology PCS (Company)

Delivery Date:

Expected Date:

Comments:

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

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: Configurator + 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

Customer Services

- ☒ Customer Services (\$250.00)
 - ☒ Accounting Application Training...
 - ☒ Accounting Training
 - ☒ Accounting Training (\$100.00)
 - ☒ **Security Clearance Request**
 - ☐ Company Orientation (\$50.00)
 - ☒ Workstation Configuration
 - ☒ **Laptop - Windows (\$100.00)**
 - ☐ Laptop - Macintosh (\$75.00)
 - ☐ Webinar Registration

Radio buttons points to the 'Laptop - Windows' entry.

Name: Laptop - Windows

Associated Cost: \$100.00

Run complete diagnostic test, install company applications.

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

Select File Drop file here to upload

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

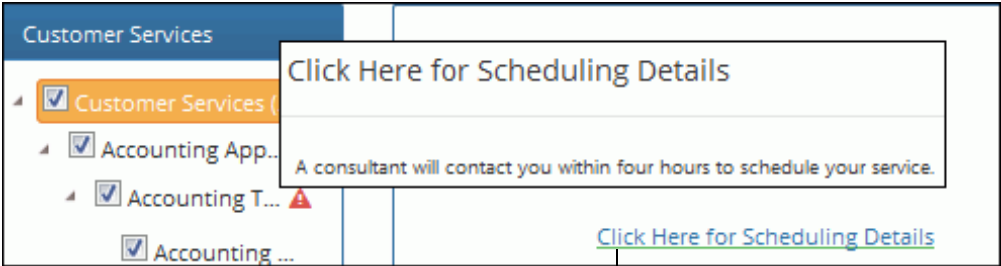
If it is a root service entry, this image will appear next to the entry as shown in the example below.

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.

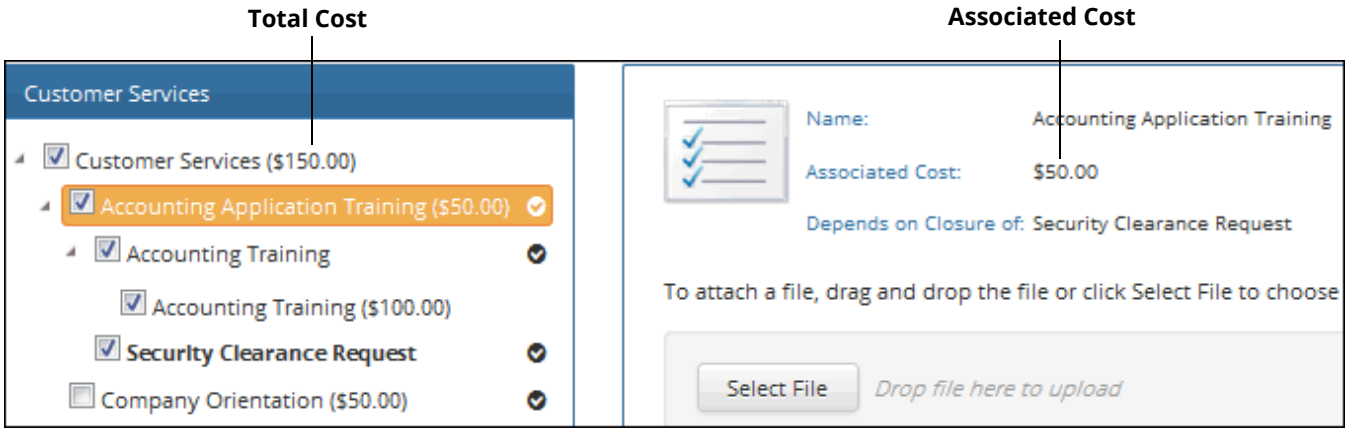


Footer in Service Request Screen

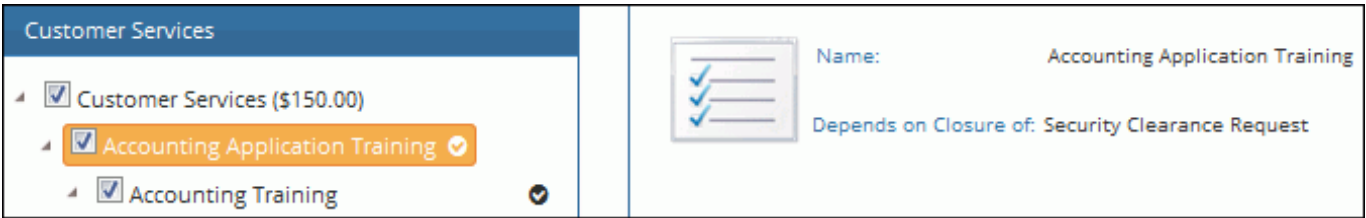
Configuration Item - Select the configuration item to associate with the Change or Purchase Request record that is created when the request is submitted.

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.**

Group Access


Select Support Rep Groups

Select Customer Groups

<input type="checkbox"/>	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

Add

Cancel

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

Service Catalog Section

Position

Group Access

Image:

Root Service Request Entry

New Root Service Request | Expand All | Collapse All | Add | Edit | Delete

Customer Services

Services

1

Add

Custc

Service Catalog Section

Customer Services

Group Access

Platinum Support (Customers)


Placeholder

Yes

Position

2

Image



Header Title

Click Here for Scheduling Details

Header:

Costs will billed automatically to your department.

Footer Title

Click Here for Scheduling Details

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

<div>Customer Services</div> <div><div><input checked="" type="checkbox"/> Customer Services</div><div><input type="checkbox"/> Accounting Application Training (\$50.00)</div><div><input type="checkbox"/> Accounting Training</div></div>	<div> Name: Customer Services</div> <div>Training and IT services</div>
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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

<div>Service Catalog Section</div> <div>Services</div> <div>Position: 1</div> <div>Group Access</div> <div>Image: Add</div> <div>Root Service Request Entry: Custom</div> <div>New Root Service Request Expand All Collapse All Add Edit Delete</div> <div><div>Customer Services</div><div><div>Accounting Application Training</div><div>Accounting Training</div><div>Security Clearance Request</div></div></div>	<div>Service Catalog Section: Accounting Application 1</div> <div>Placeholder: Yes No</div> <div>Link: Yes No</div> <div>Template Type: Change Purchase</div> <div>Template: Accoui +</div> <div>Required: Yes No</div> <div>Radio Button: Yes No</div> <div>Image: Add</div> <div>Description:</div>	<div>Configuration Item</div> <div>Associated Cost: \$ 50</div> <div>Group Access</div> <div>Dependencies: Security Clearance Request</div>
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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

Customer Services	
<input checked="" type="checkbox"/> Customer Services (\$150.00)	 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
<input checked="" type="checkbox"/> Accounting Application Training (\$50.00) ✓	
<input checked="" type="checkbox"/> Accounting Training ✓	
<input checked="" type="checkbox"/> Accounting Training (\$100.00)	
<input checked="" type="checkbox"/> Security Clearance Request ✓	

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