knowledge15®
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Catalog 101:

Getting Started with

Request Fulfillment

Steve Ly & Gary Van Roy

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

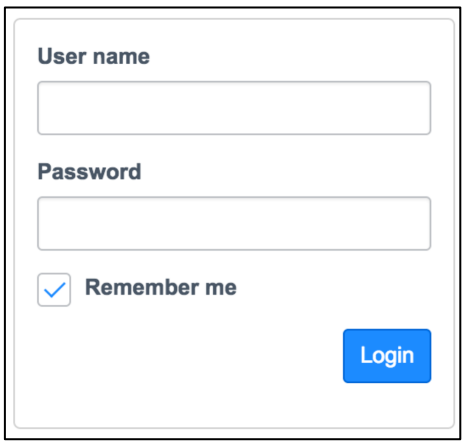
This lab explains how to define catalog details, create content such as categories, and manage the catalog homepage. Subject areas include the following:

- Create a Catalog
- Add a Catalog to the Catalogs Homepage
- Create Categories
- Customize a Catalog Homepage

Lab 1.0 Create a Catalog and Categories

Log on to Your Training Instance

1. Navigate to the unique instance URL provided.



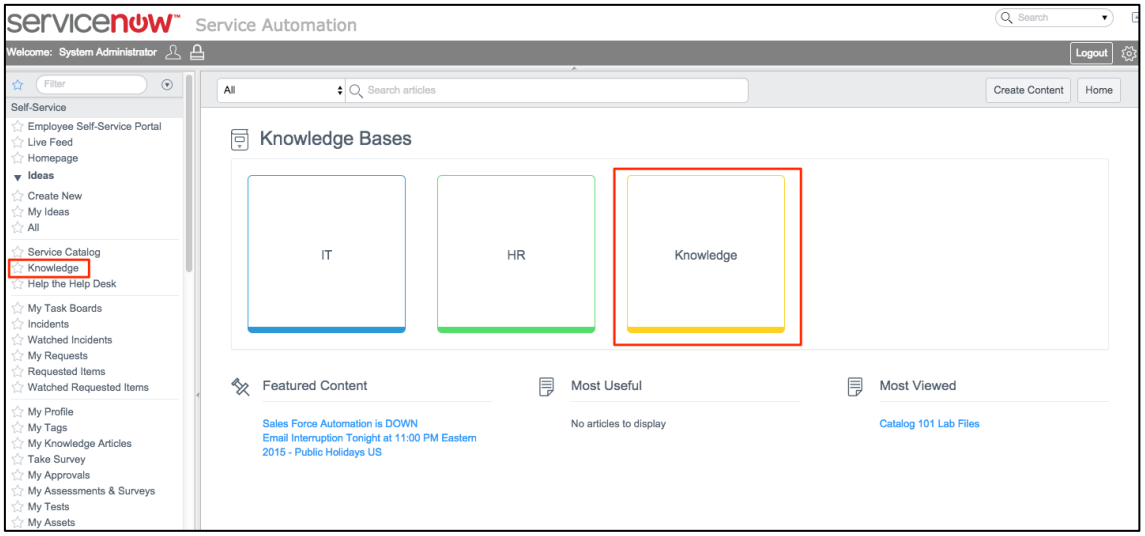
2. Log on with the provided credentials.

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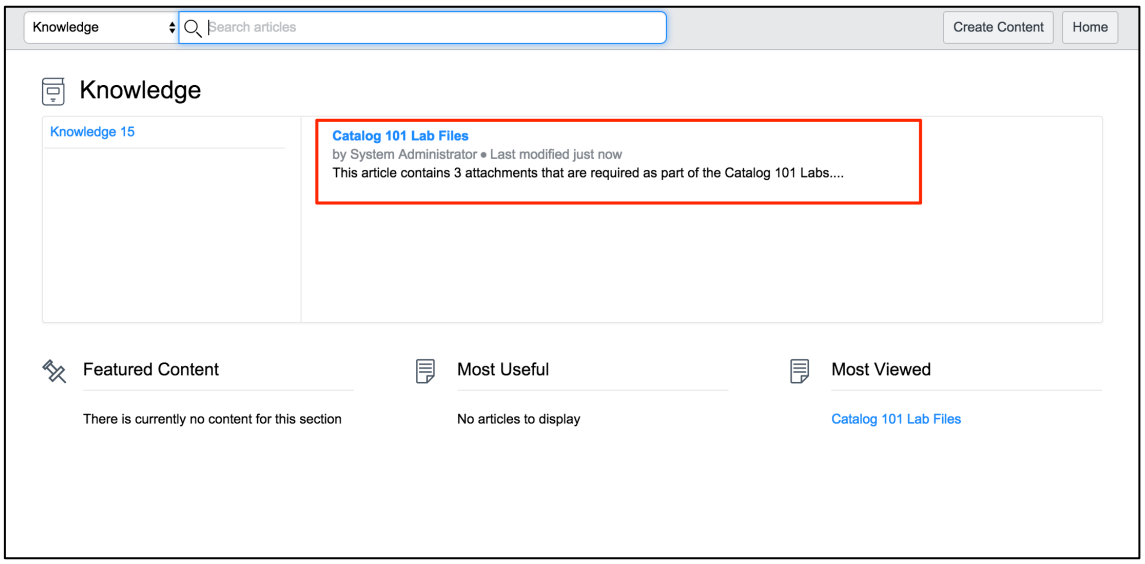
Download Catalog Items and Graphics

Download icons and graphics from the Knowledge Base by following these steps.

1. Navigate to **Self Service > Knowledge.** Click the **Knowledge** category.



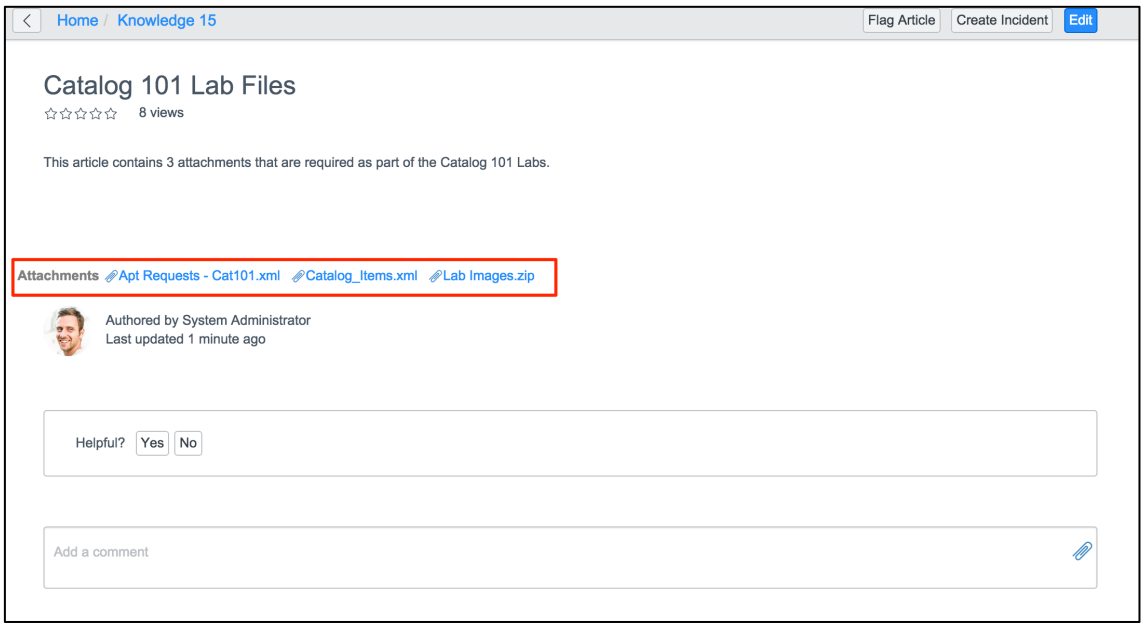
2. Select the knowledge-base article **Catalog 101 Lab Files**.



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3. Select and open **Catalog 101 Lab Files**. Select EACH of the three attachments to download the files needed for this lab. Download both of them.

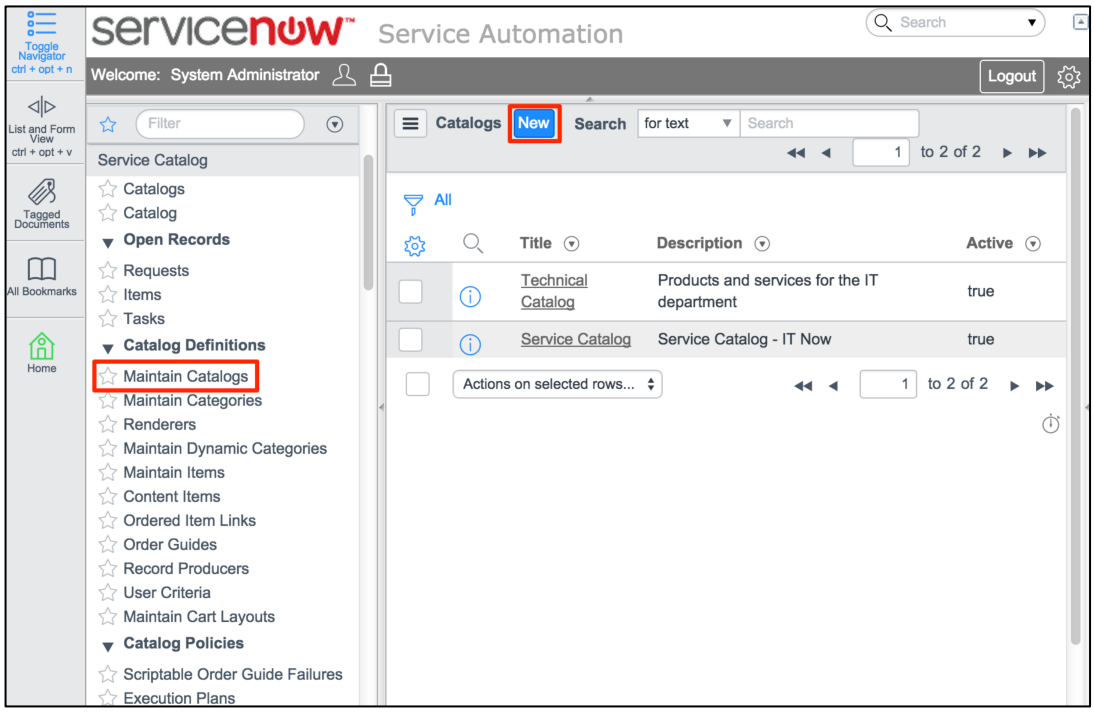
   Note the download location for future reference.



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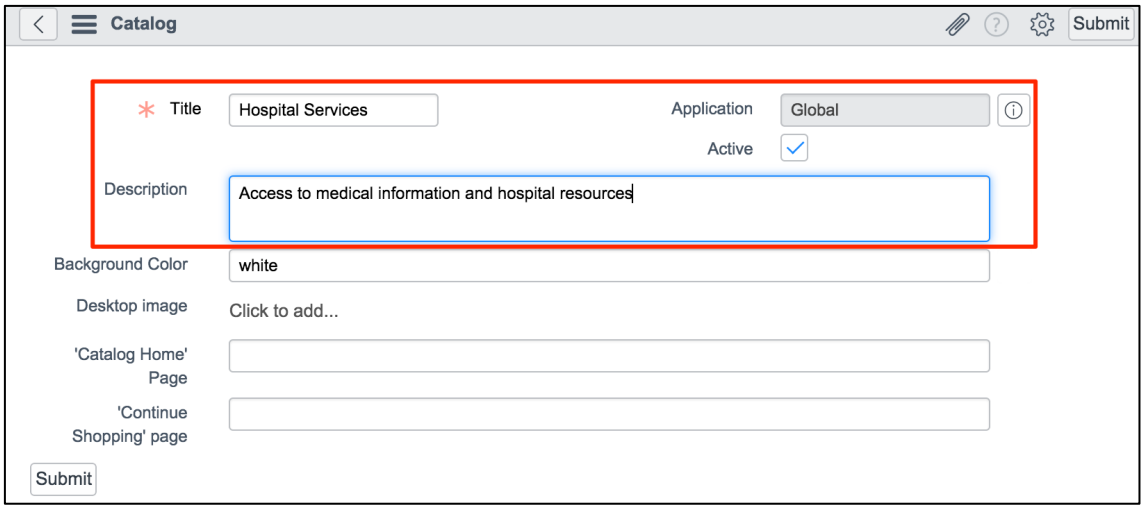
Create a Catalog

1. Navigate to **Service Catalog > Catalog Definition > Maintain Catalogs**. Click the **New** button.



2. Complete the form with the information below.

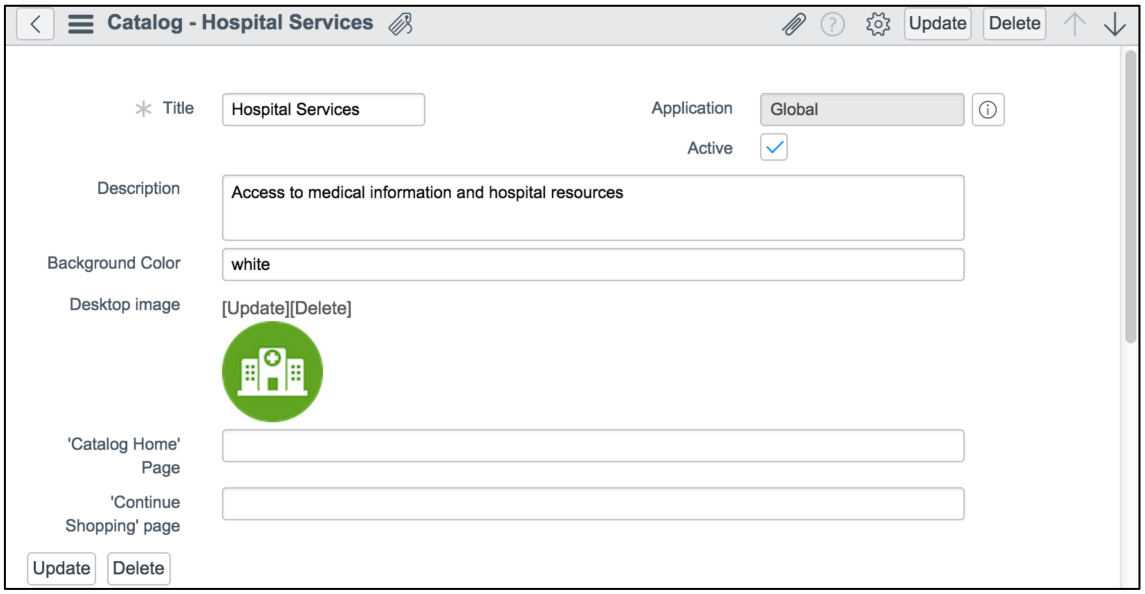
   Title: **Hospital Services**
   Description: **Access to medical information and hospital resources**



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3. Right-click the form header and select **Save**.

4. Set the **Desktop image** by clicking on the **Click to add…** link and select **Hospital.png**.

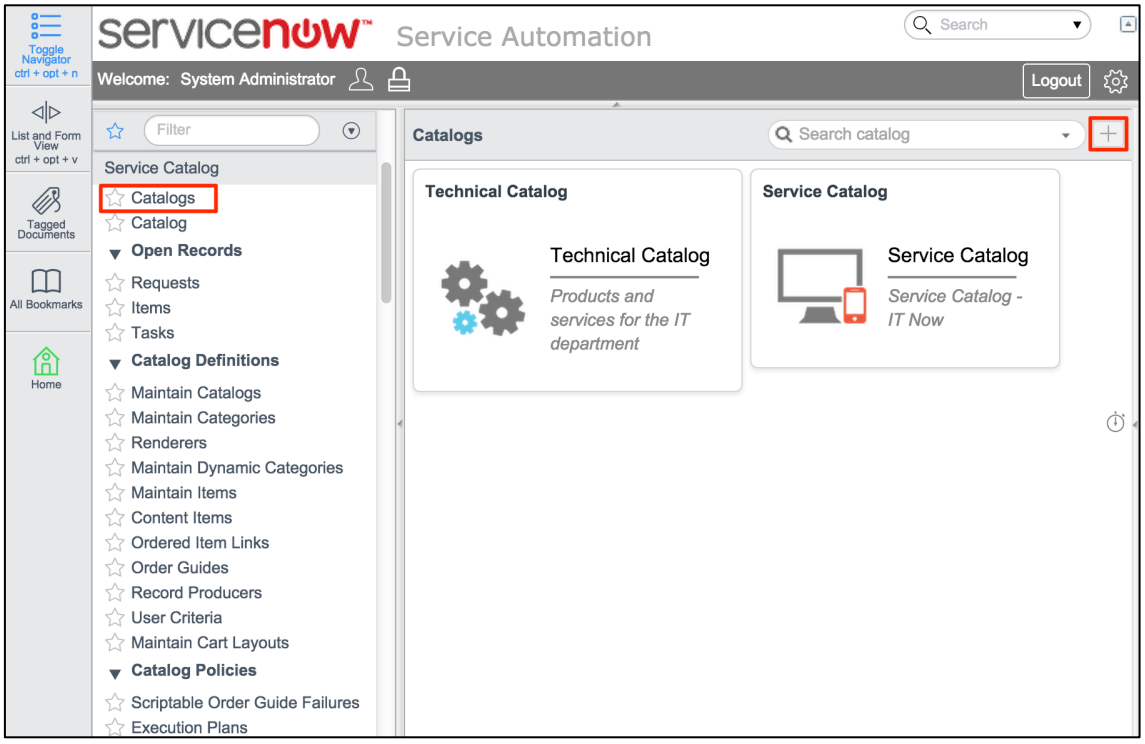


5. Click **Update**.

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Add a Catalog to Catalogs Homepage

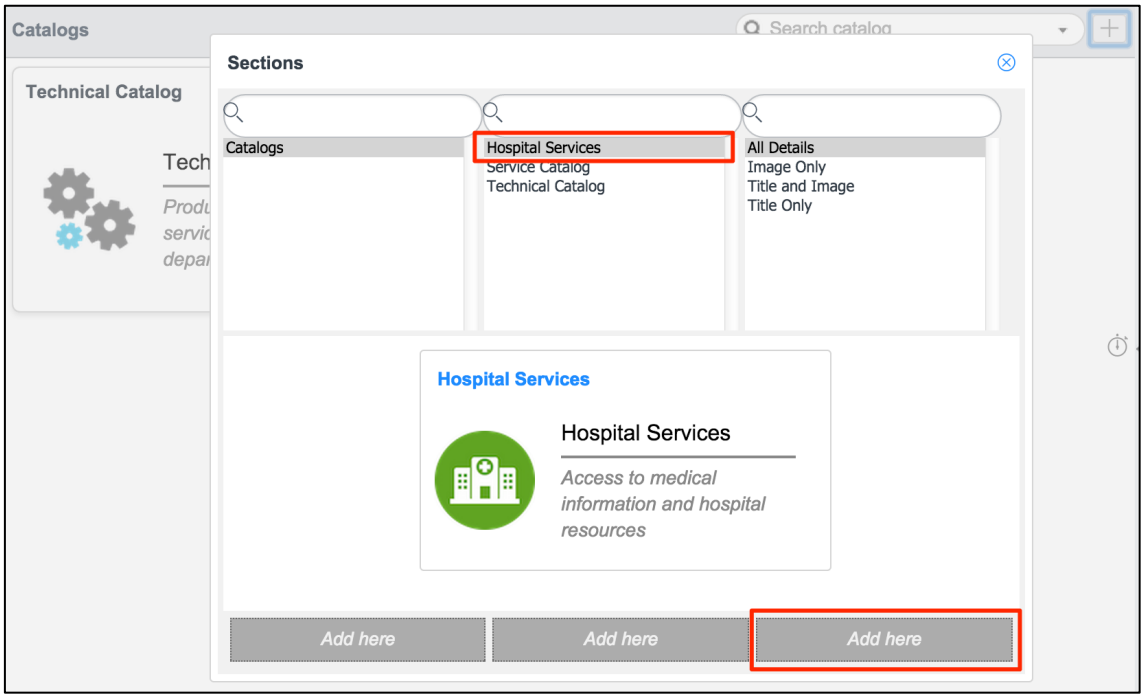
1. Navigate to **Service Catalog > Catalogs**. Click the " **+** " button.



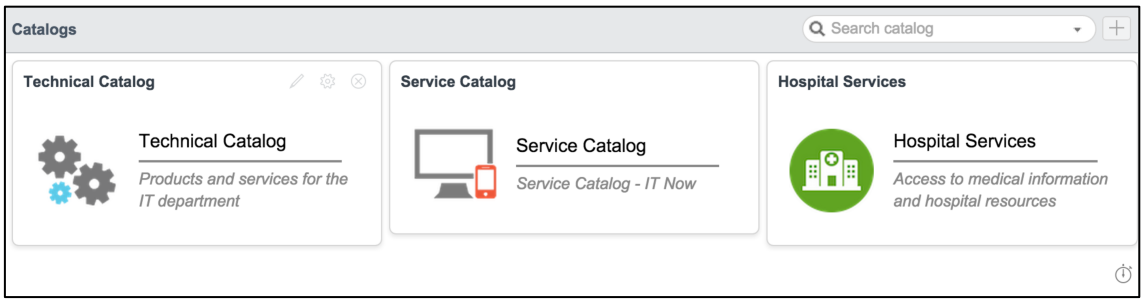
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2. Select the **Hospital Services** catalog in the middle panel of the pop-up screen that appears.

3. Click **Add here** in the location where the catalog should appear on the homepage.



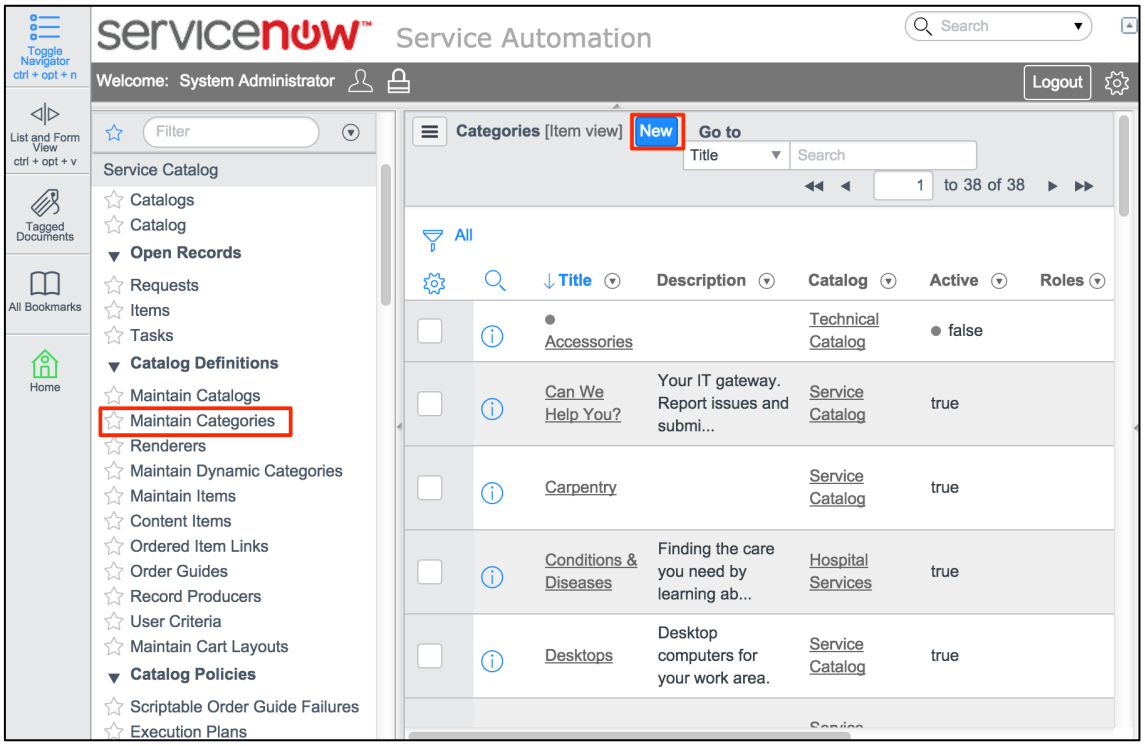
4. Close the pop-up window and view the updated Catalogs homepage.



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Create Categories

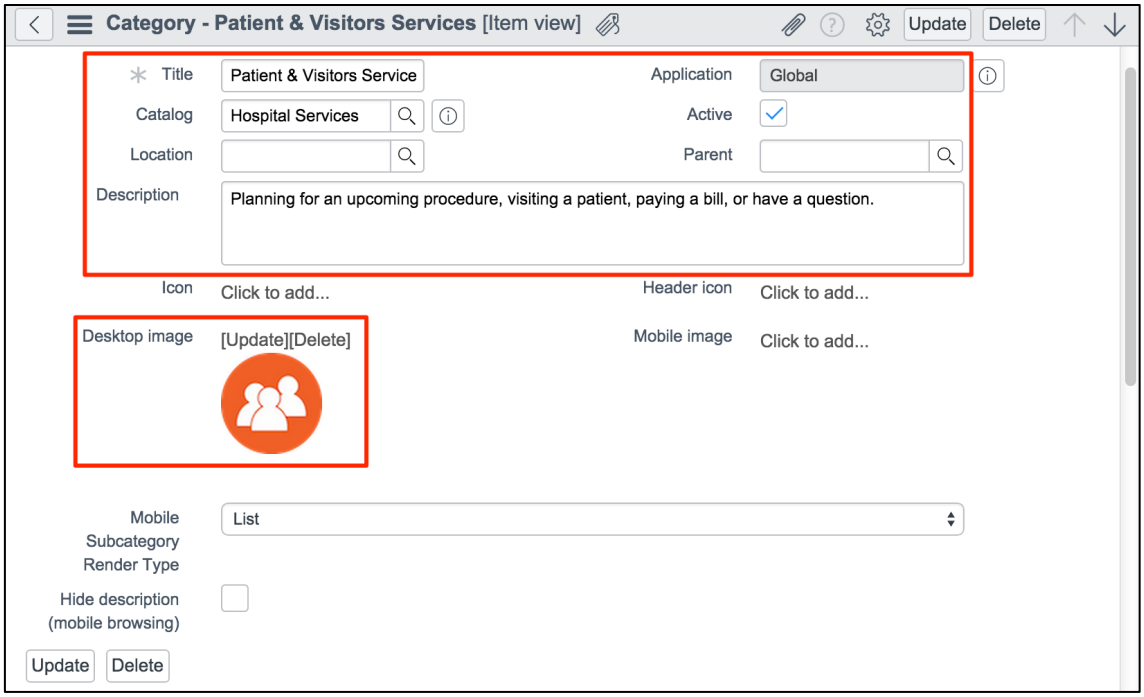
1. Navigate to **Service Catalog > Maintain Categories**. Click the **New** button.



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2. Complete the form with the following information.

   Title: **Patient & Visitors Services**
   Catalog: **Hospital Services**
   Description: **Planning for an upcoming procedure, visiting a patient, paying a bill, or have a question.**
   Desktop Image: Click the **Click to add**… link and select **Patients.png**.



3. Click **Update**.

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4. Repeat Steps 1 - 3 to add additional **Categories**.

   Title: **Medical & Internal Services**
   Catalog: **Hospital Services**
   Description: **Comprehensive medical and surgical services**
   Desktop Image: Click the **Click to add**… link and select **MedicalServices.png**.

   Title: **Programs & Classes**
   Catalog: **Hospital Services**
   Description: **Information about community and corporate wellness programs and events**
   Desktop Image: Click the **Click to add**… link and select **Wellness.png**.

   Title: **Conditions & Diseases**
   Catalog: **Hospital Services**
   Description: **Finding the care you need by learning about the conditions and diseases we treat**
   Desktop Image: Click the **Click to add**… link and select **Diseases.png**.

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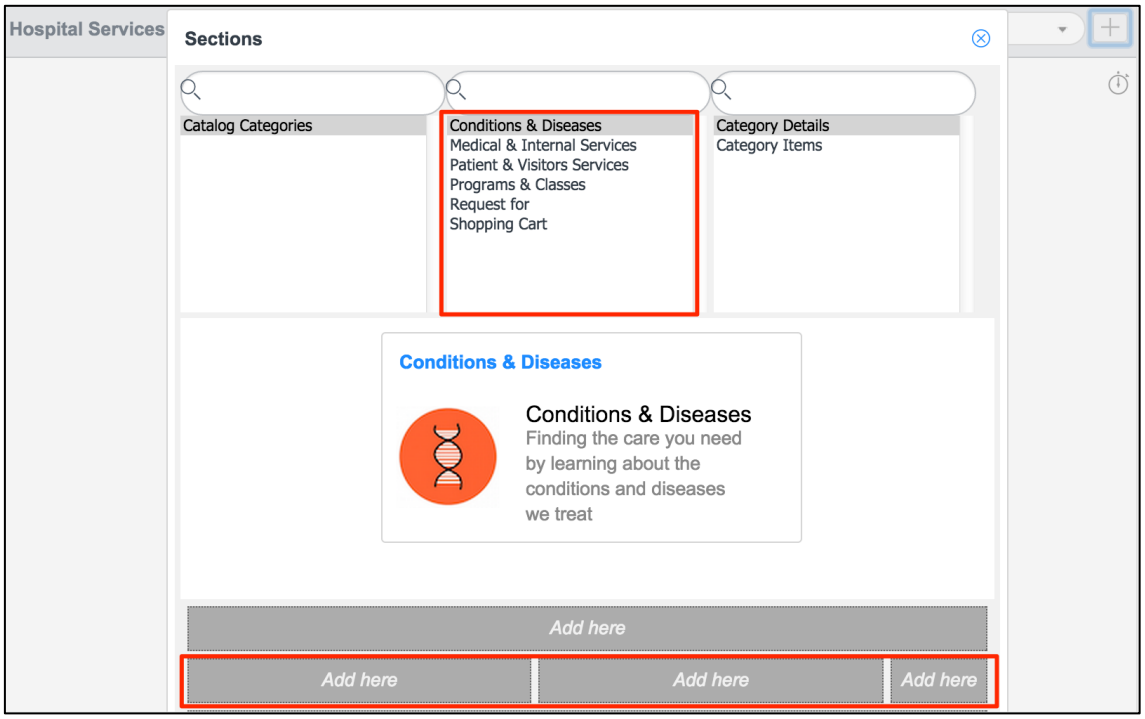
Customize a Catalog Homepage

1. Navigate to **Service Catalog > Catalogs** select the **Hospital Services** catalog.

2. Click " **+** " symbol at the top of the page to add a category.

3. Select the newly created categories from the middle panel of the pop-up screen that appears.

   Left Section: **Patient & Visitors Services, Programs & Classes**
   Middle Section: **Medical & Internal Services, Conditions & Diseases**
   Right Section: **Shopping Cart**

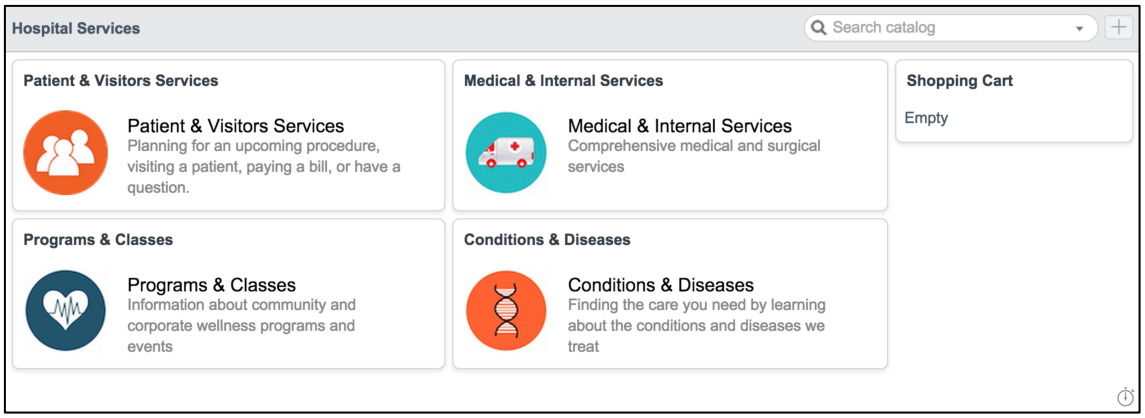


4. Close the pop-up window.

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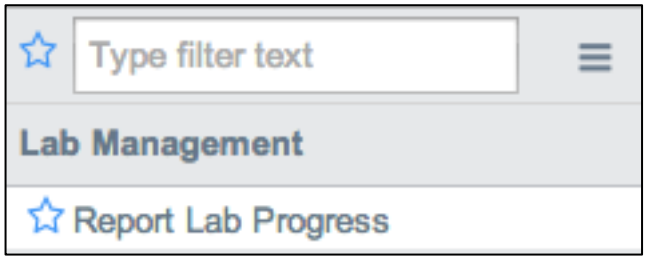
Lab Verification

1. Navigate to **Service Catalog > Catalogs**
2. Select the **Hospital Services** catalog.
3. Verify that the **Hospital Services** homepage looks like the example.

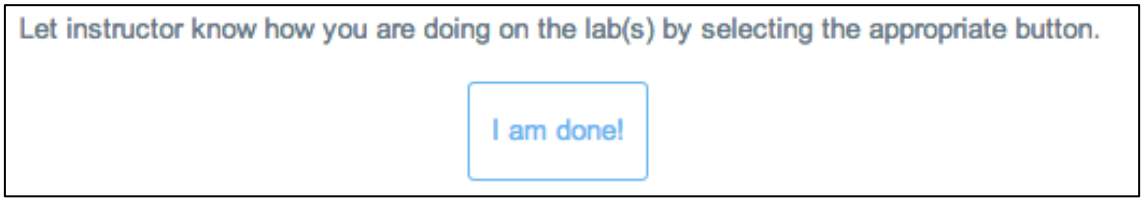


Progress Report

1. Navigate to **Lab Management> Report Lab Progress.**



2. Click **I am done!**



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Lab Goal

This lab explains how to create a catalog item with variables. Subject areas include the following:

- Create a Variable Set
- Create a Catalog Item
- Add Variable Set to Catalog Item
- Create Variables
- Import Additional Catalog Items

Lab 2.0 Create a Catalog Item

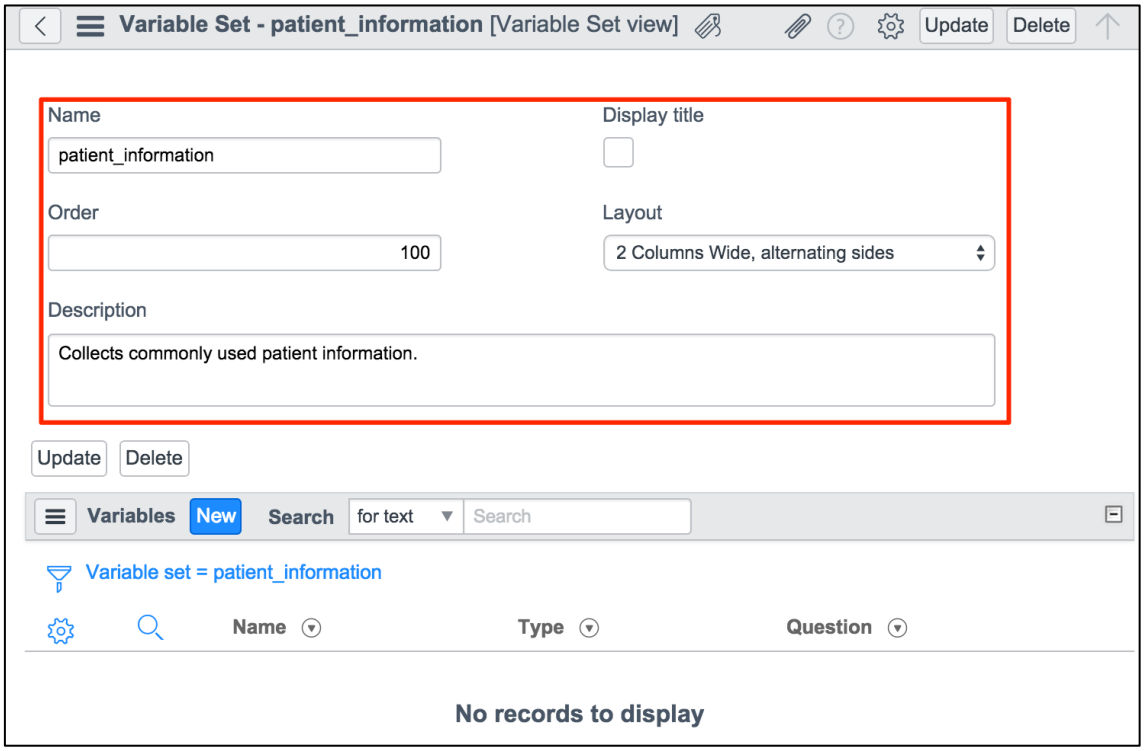
Create a Variable Set

1. Navigate to **Service Catalog > Catalog Variables > Variable Sets**.
2. Click **New**.

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3. Complete the form with the information below:

   Name: **patient_information**
   Order: **100**
   Layout: **2 Columns Wide, alternating sides**
   Description: **Collects commonly used patient information.**

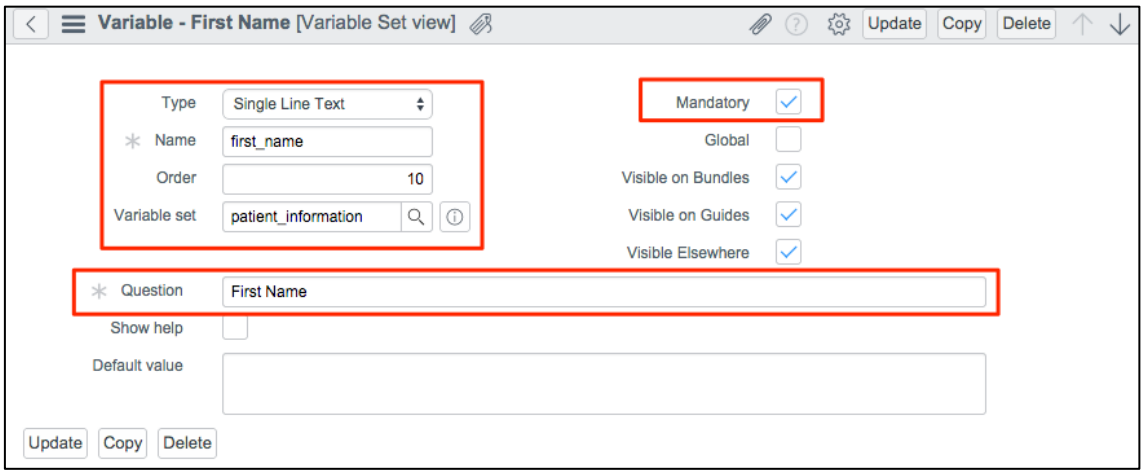


4. Right-click the form header and select **Save**.

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5. Click the **New** button under the **Variables** section and complete the form below as follows:

   Type: **Single Line Text**
   Name: **first_name**
   Order: **10**
   Variable Set: **patient_information**
   Mandatory: **True**
   Question: **First Name**
   Default Value: **<blank>**



6. Click **Submit**.

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7. Repeat Steps 5-6 to create the additional variables:

   Type: **Single Line Text**
   Name: **last_name**
   Order: **15**
   Variable Set: **patient_information**
   Mandatory: **True**
   Question: **Last Name**
   Default Value: **<blank>**

   Type: **Single Line Text**
   Name: **email**
   Order: **20**
   Variable Set: **patient_information**
   Mandatory: **True**
   Question: **E-mail**
   Default Value: **<blank>**

   Type: **Single Line Text**
   Name: **phone**
   Order: **25**
   Variable Set: **patient_information**
   Mandatory: **True**
   Question: **Phone**
   Default Value: **<blank>**

   Type: **Date**
   Name: **birthday**
   Order: **30**
   Variable Set: **patient_information**
   Mandatory: **True**
   Question: **Birthday**
   Default Value: **<blank>**

   Type: **Single Line Text**
   Name: **patient_id**
   Order: **35**
   Variable Set: **patient_information**
   Question: **Patient ID**
   Default Value: **<blank>**

8. Click **Update** to save the changes for the variable set.

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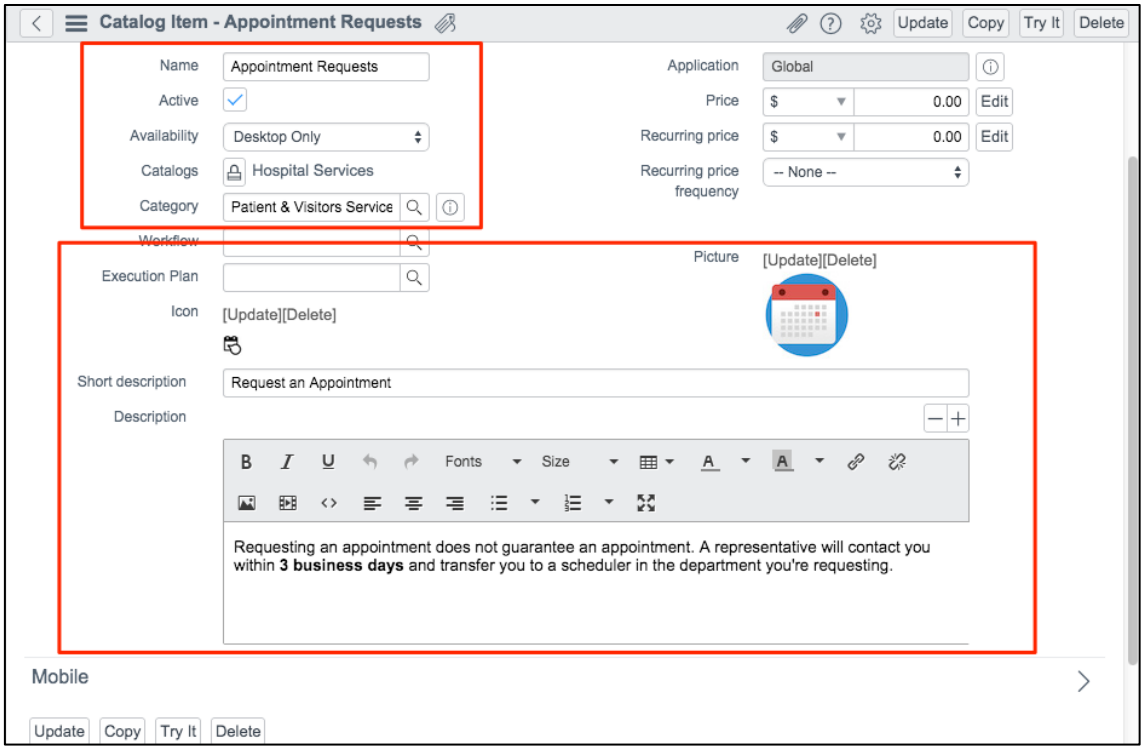
Create a Catalog Item

1. Navigate to **Service Catalog > Maintain Items**.

2. Click **New**.

3. Configure the Item as shown below:

   Name: **Appointment Requests**
   Catalogs: **Hospital Services**
   Category: **Patient & Visitors Services**
   Short Description: **Request an Appointment**
   Description: **Requesting an appointment does not guarantee an appointment. A representative will contact you within 3 business days and transfer you to a scheduler in the department you're requesting.**
   Icon: *Click to add…* **Appointments_icon.png** (downloaded earlier)
   Picture: *Click to add…* **Appointments.png** (downloaded earlier)



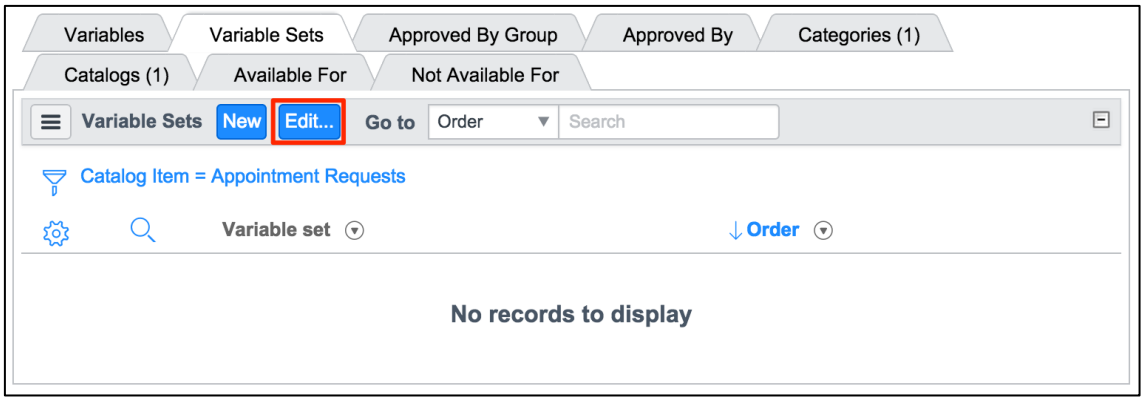
4. Click the **Update** button to create catalog item**.**

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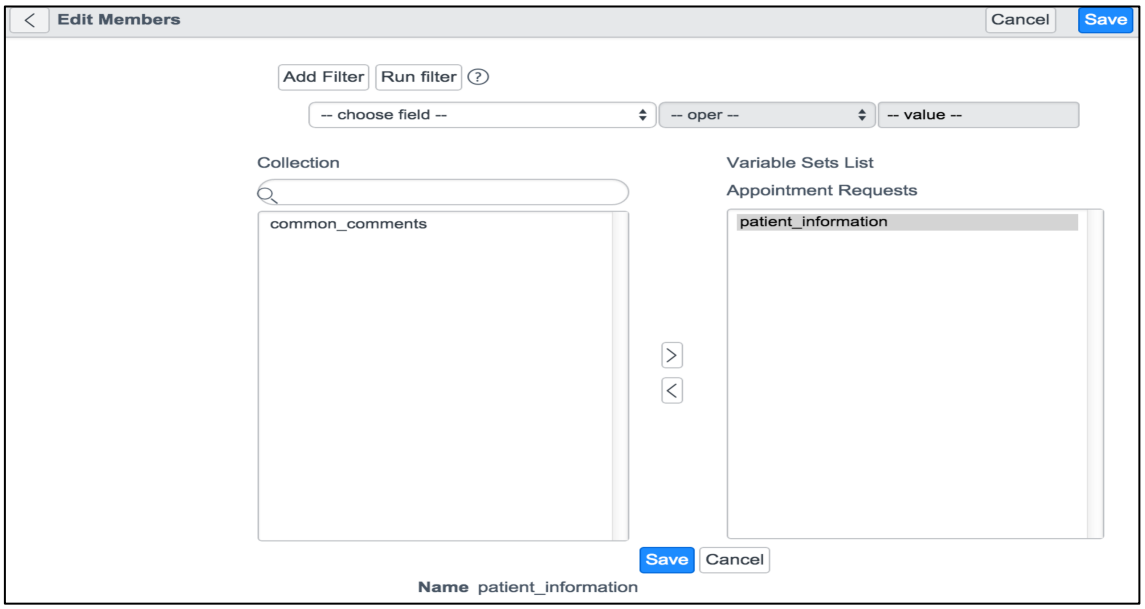
Add Variable Set to Catalog Item

1. Navigate to **Service Catalog > Maintain Items** and open the **Appointment Requests** catalog item.

2. Click the **Variable Set** tab under Related Lists.



3. Click the **Edit** button and select the **patient_information** to the Variable Sets List (right side).

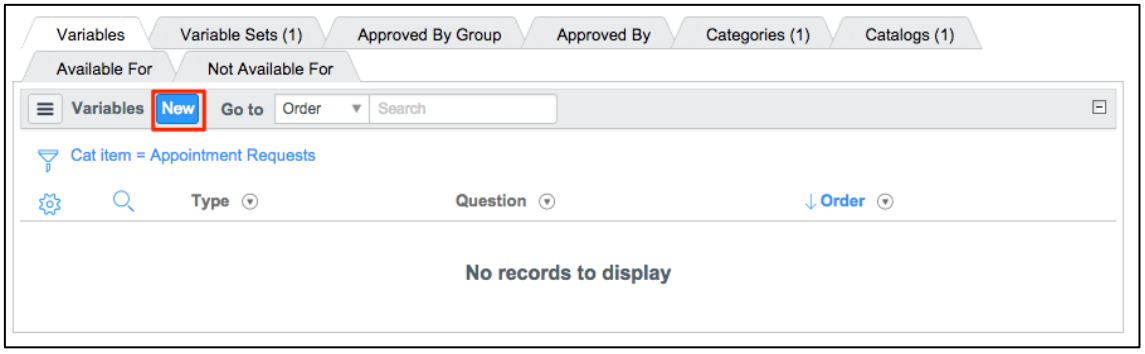


4. Click **Save**.

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Create Variables

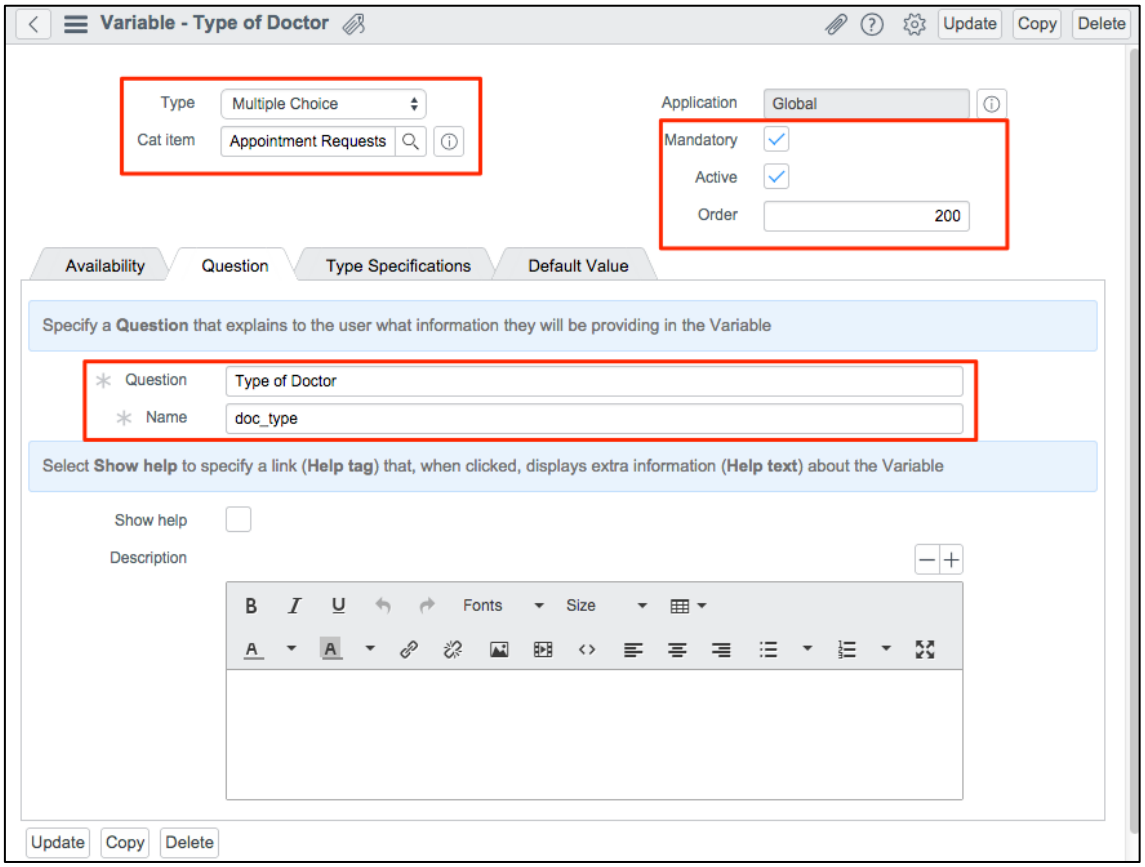
1. Click the **Variables** tab under Related Lists.
2. Click **New**.



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3. Configure the variables as shown below.

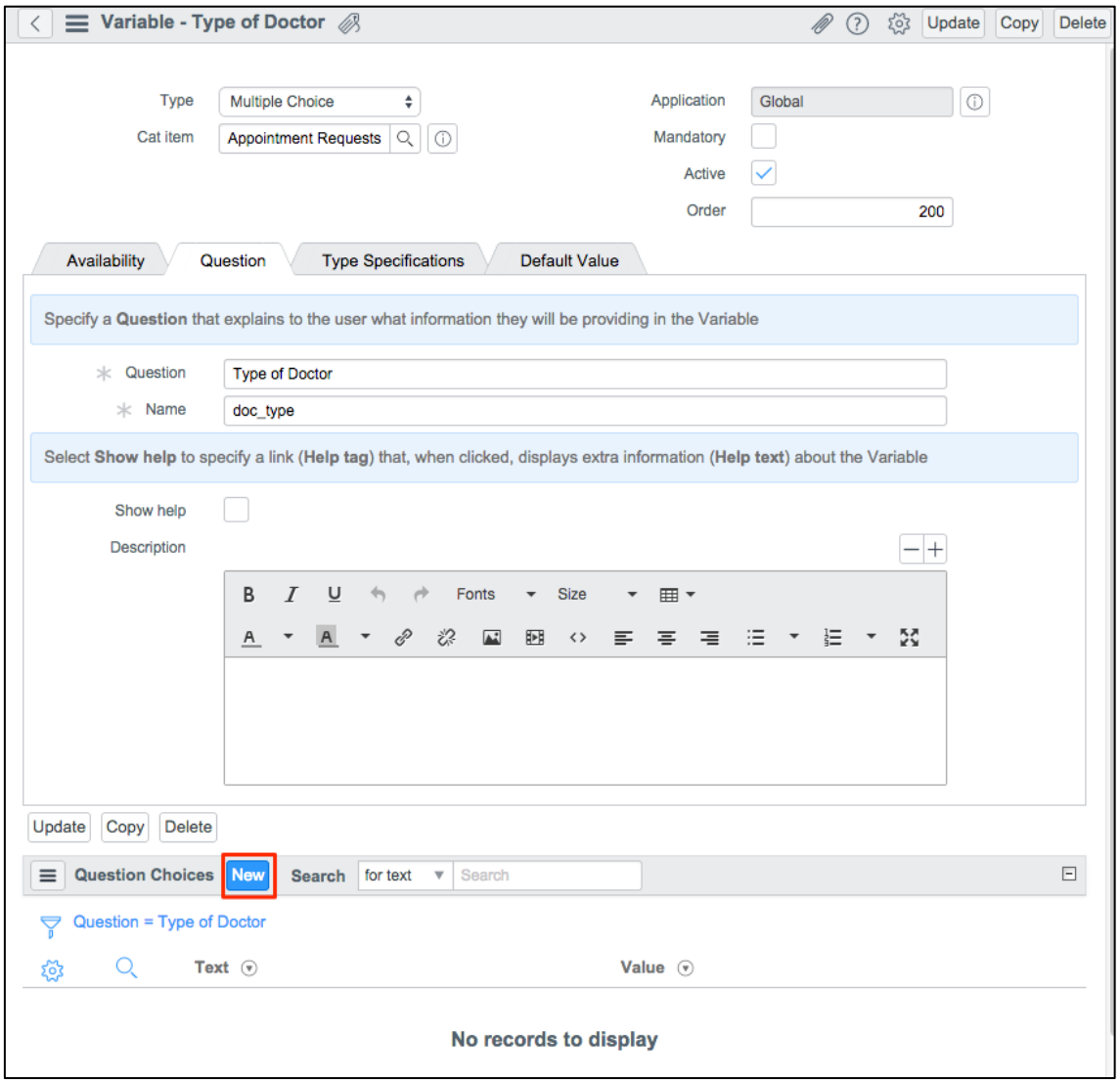
   Type: **Multiple Choice**
   Cat Item: **Appointment Requests**
   Mandatory: **True**
   Order: **200**
   Question: **Type of Doctor**
   Name: **doc_type**
   Type Specifications > Do Not Select the First Choice: **True**
   Default Value: **false**



4. Right-click the form header and select **Save**.

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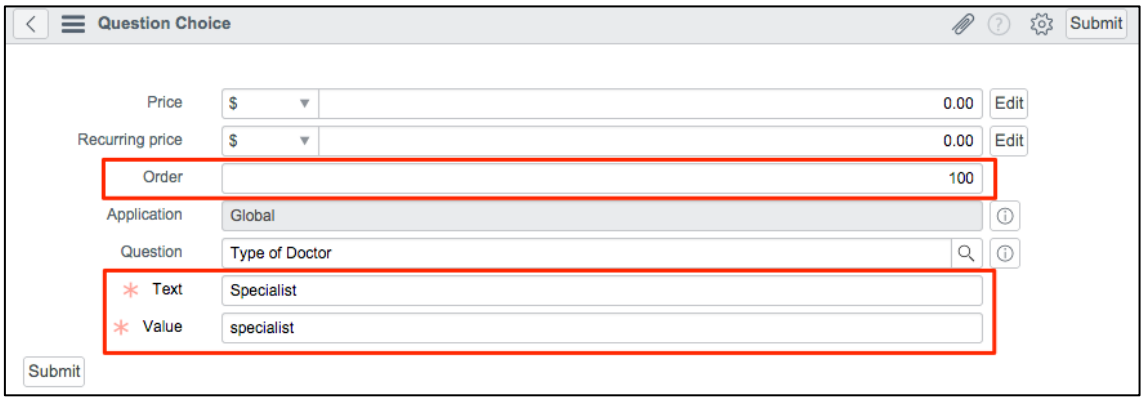
5. Click the **New** button under the **Question Choices** section.



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6. Configure the form as shown below.

   Order: **100**
   Text: **Specialist**
   Value: **specialist**



7. Click **Submit** to save choice.

8. Repeat Steps 5-7 for the below choices.

   Order: **200**
   Text: **Pediatrician**
   Value: **pediatrician**

   Order: **300**
   Text: **Primary Care Physician**
   Value: **primary care physician**

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9. Repeat steps 2-8 for the below variables.

Type: **Select Box**
Cat Item: **Appointment Requests**
Order: **300**
Question: **Specialty**
Name: **specialty**
Type Specifications > Include None: **True**
Default Value: **<blank>**
Question Choices:
Order: **100**
Text: **Audiology**
Value: **audiology**
Order: **200**
Text: **Cardiology**
Value: **cardiology**

Order: **300**
Text: **Dermatology**
Value: **dermatology**

Order: **400**
Text: **Neurology**
Value: **neurology**

Type: **Select Box**
Cat Item: **Appointment Requests**
Mandatory: **True**
Order: **400**
Question: **Type of Visit**
Name: **visit_type**
Type Specifications > Include None: **True**
Default Value: **<blank>**
Question Choices:
Order: **100**
Text: **New Visit**
Value: **new visit**

Order: **200**
Text: **Follow-up Existing Patient**
Value: **follow-up existing patient**

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Order: **300**
Text: **Follow-up for ER Visit**
Value: **follow-up for er visit**

Order: **400**
Text: **Second Opinion**
Value: **second opinion**

Type: **Container Start**
Cat Item: **Appointment Requests**
Order: **500**
Question: **<blank>**
Name: **apt_cs**
Type Sepecifications > Layout: **2 Columns Wide, Alternating Sides**
Default Value: **<blank>**

Type: **Multiple Choice**
Cat Item: **Appointment Requests**
Mandatory: **True**
Order: **600**
Question: **Preferred Appointment Time**
Name: **preferred_apt_time**
Type Specifications > Choice Direction: **Across**
Type Specifications > Do Not Select the First Choice: **True**
Default Value: **false**
Question Choices:

Order: **100**
Text: **AM**
Value: **am**

Order: **200**
Text: **PM**
Value: **pm**

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Type: **Multiple Choice**
Cat Item: **Appointment Requests**
Mandatory: **True**
Order: **700**
Question: **Preferred Appointment Date**
Name: **preferred_apt_date**
Type Specifications > Choice Direction: **Across**
Type Specifications > Do Not Select the First Choice: **True**
Default Value: **false**
Question Choices:

Order: **100**
Text: **Mon**
Value: **mon**

Order: **200**
Text: **Tue**
Value: **tue**

Order: **300**
Text: **Wed**
Value: **wed**

Order: **400**
Text: **Thur**
Value: **thur**

Order: **500**
Text: **Fri**
Value: **fri**

Type: **Container End**
Cat Item: **Appointment Requests**
Order: **800**

Type: **Single Line Text**
Cat Item: **Appointment Requests**
Mandatory: **True**
Order: **900**
Question: **Physician's Name**
Name: **physicians_name**

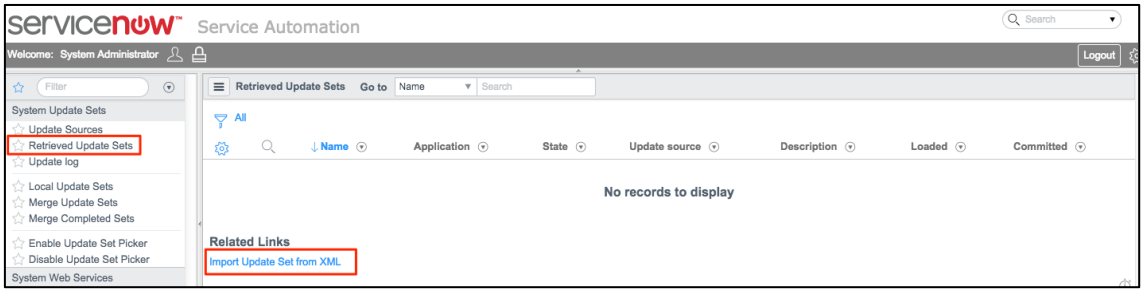
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10. Click **Update** to save catalog item changes.

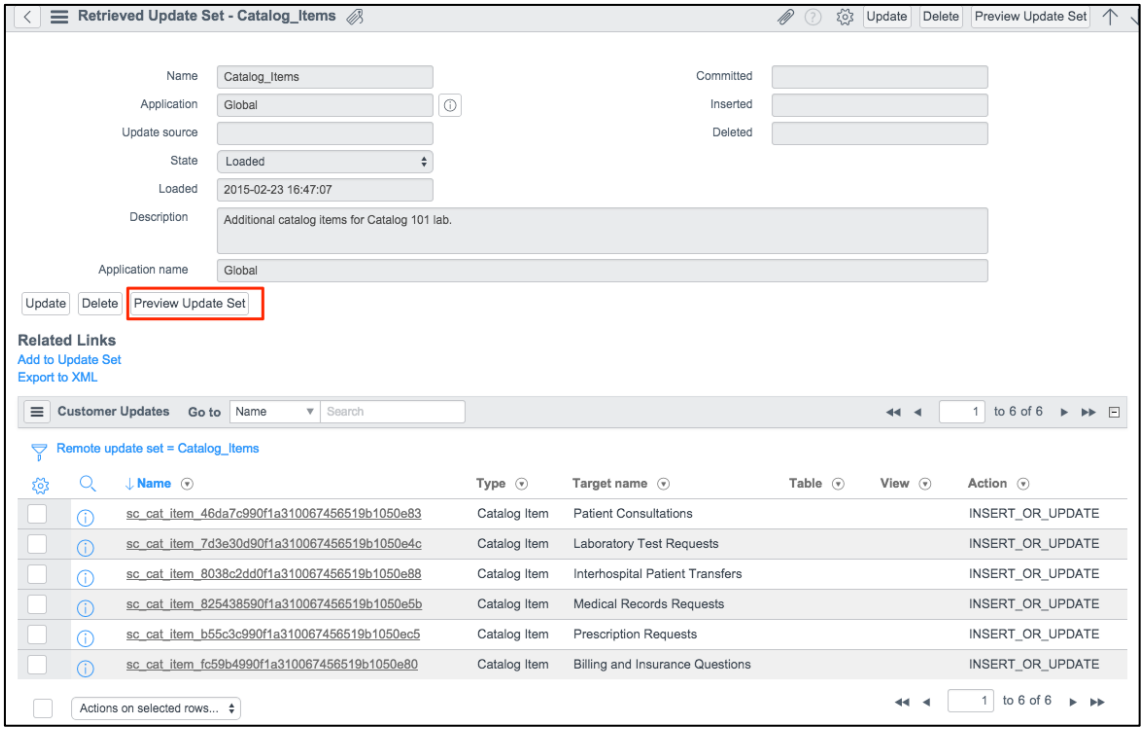
Import Additional Catalog Items

1. Navigate to **System Update Sets > Retrieved Update Sets**.

2. Click the **Import Update Set from XML** link under Related Links and upload the **Catalog_Items.xml** file.

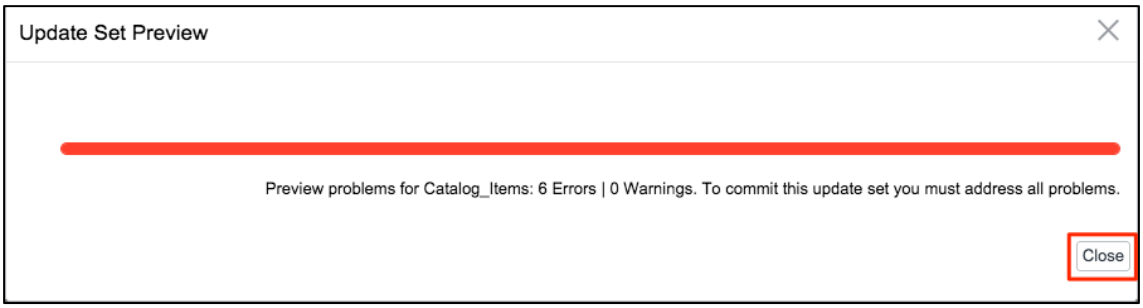


3. **Preview Update Set** and commit the update set.



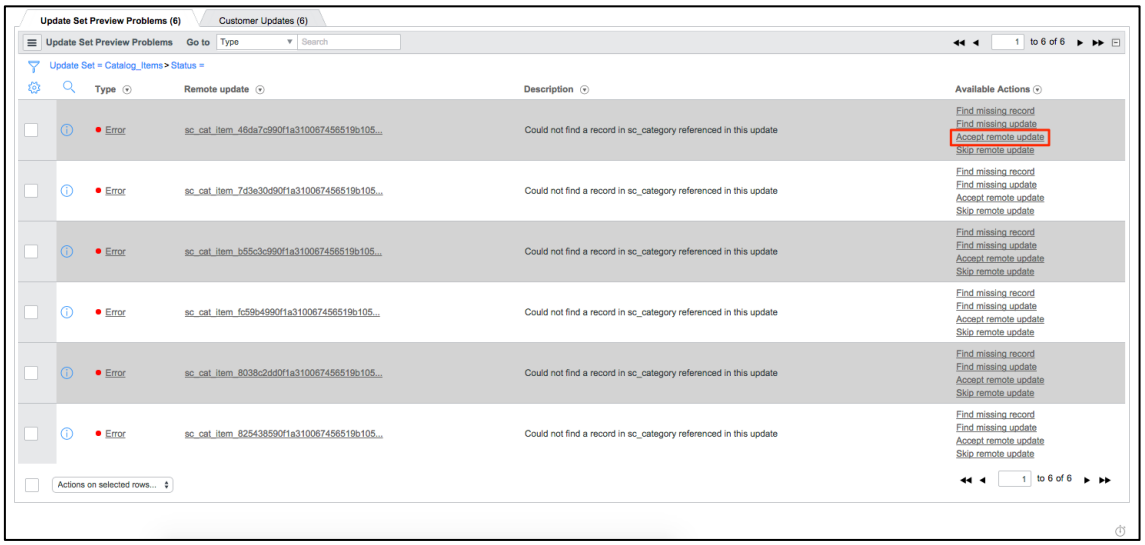
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4. When the update set preview is complete, there will be 6 errors.



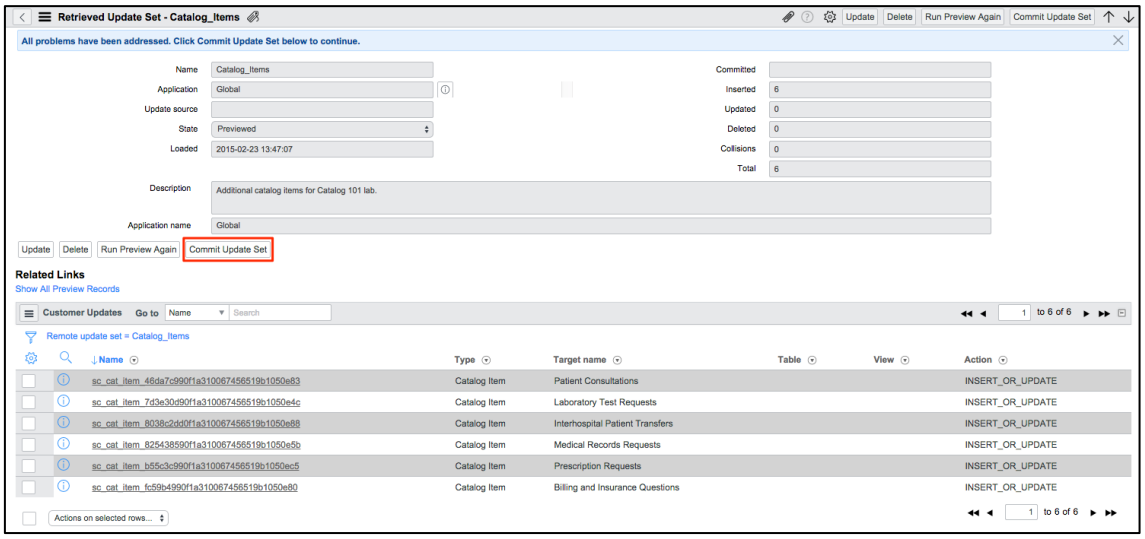
5. Click **Close** to return to the update set record.

6. Scroll down to the **Update Set Preview Problems** related list and click **Accept remote update** for all 6 errors.



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7. Once all the problems have been addressed, click **Commit Update Set**.

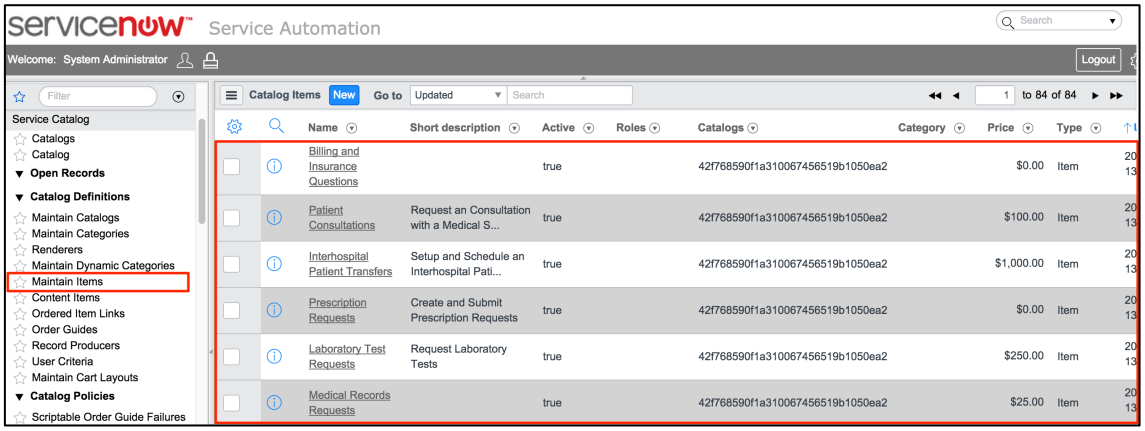


8. Click Close to confirm that the update set was commit successfully.



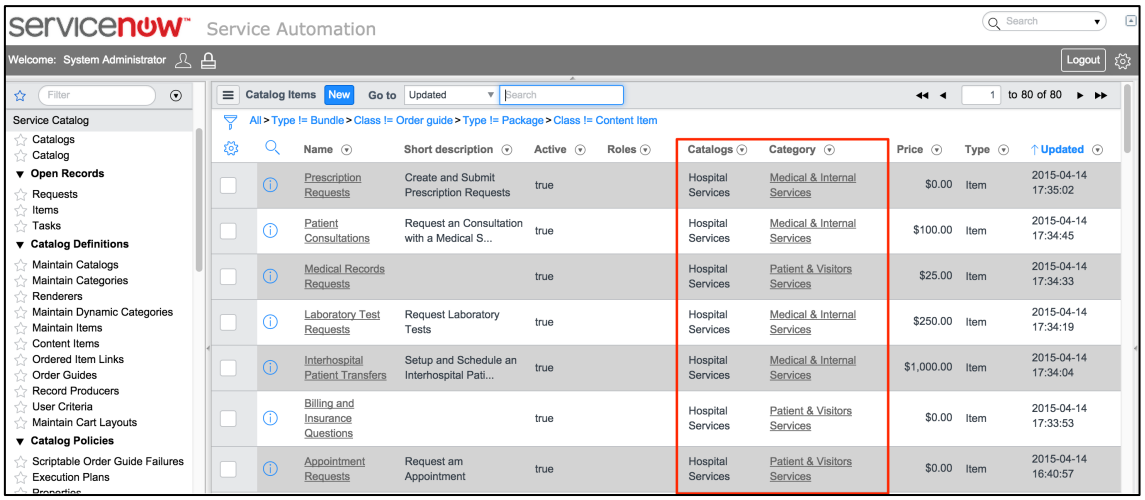
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9. Navigate to **Service Catalog > Catalog Definitions > Maintain Items** and verify that the **6** additional catalogs items have been added.



10. Update the **Catalogs** and **Category** values for the 6 items based on the below information.

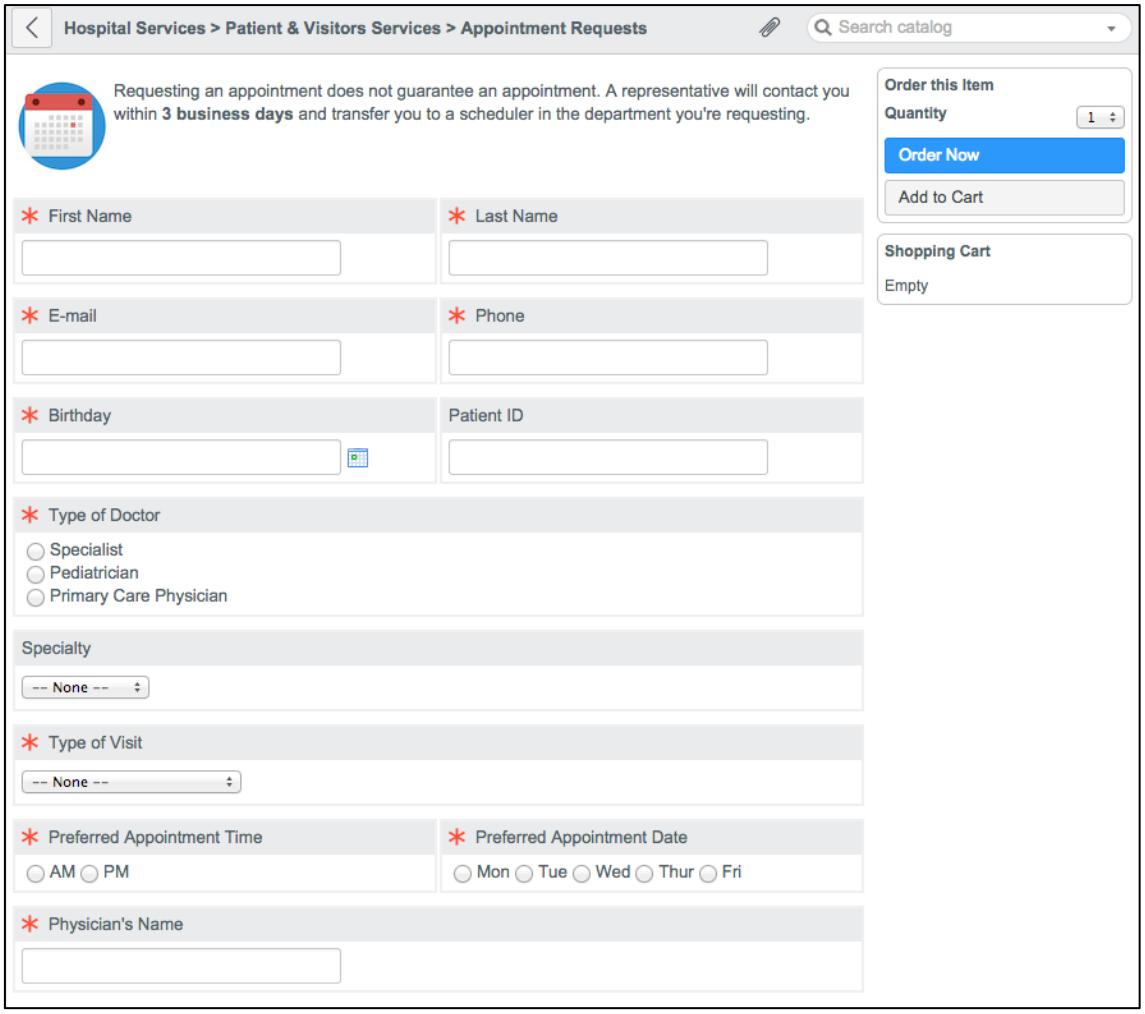
Catalog Item(s)	Catalogs	Category
Appointment Requests	Hospital Services	Patient & Visitor Services
Billing and Insurance Questions	Hospital Services	Patient & Visitor Services
Interhospital Patient Transfers	Hospital Services	Medical & Internal Services
Laboratory Test Requests	Hospital Services	Medical & Internal Services
Patient Consultations	Hospital Services	Medical & Internal Services
Prescription Requests	Hospital Services	Medical & Internal Services



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Lab Verification

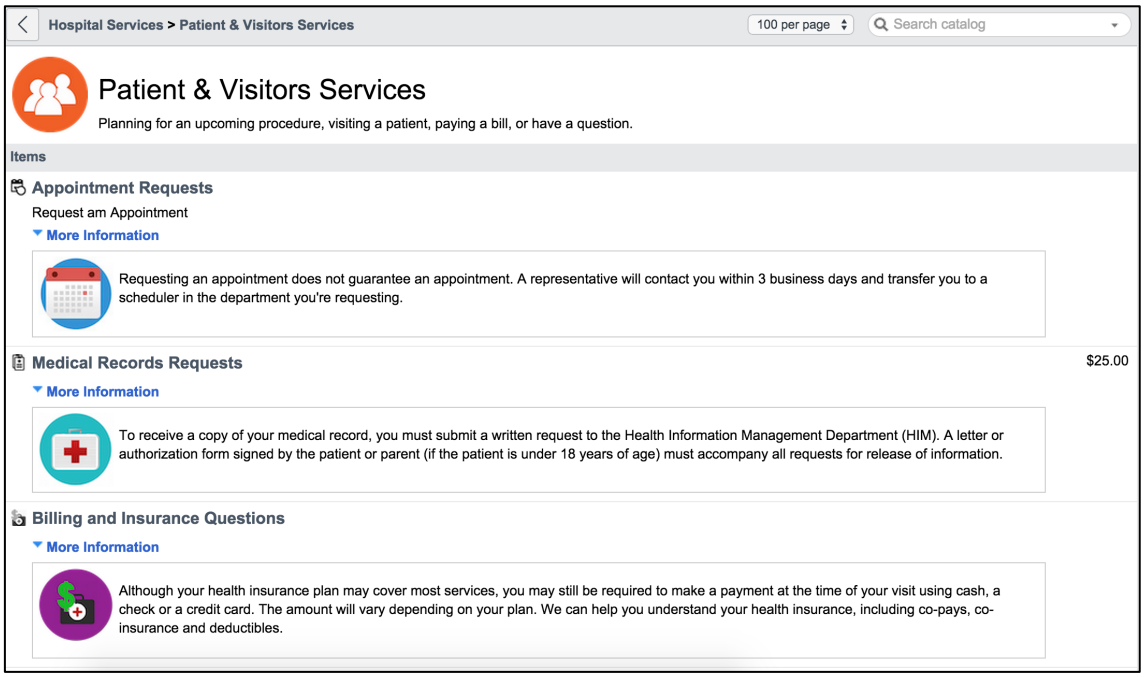
1. Navigate to **Service Catalog > Catalog Definitions > Maintain Items.**
2. Open the catalog item **Appointment Requests**.
3. Click **Try It** in the header to preview the catalog item.
4. Verify that the **Appointment Requests** catalog looks like the example.



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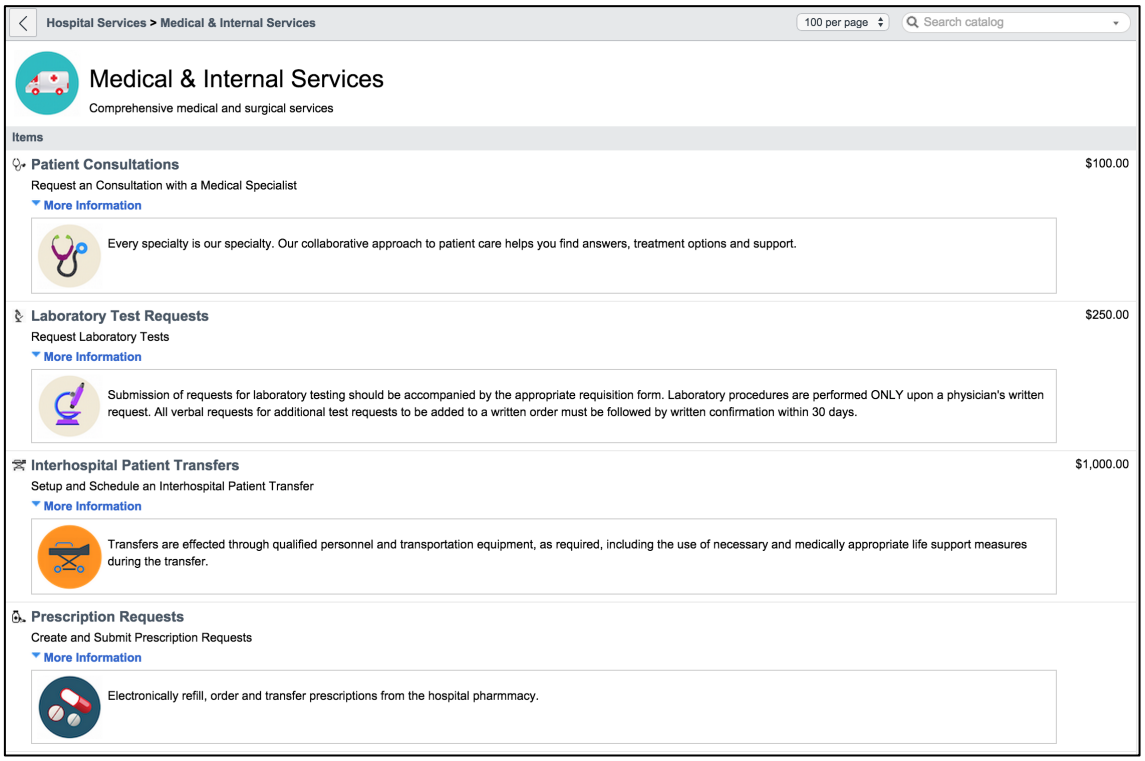
Verify Additional Catalog Items

1. Navigate to **Service Catalog > Catalogs > Hospital Services > Patient & Visitors Services**
2. Verify that the **Patient & Visitors Services** category contains the below catalog items.



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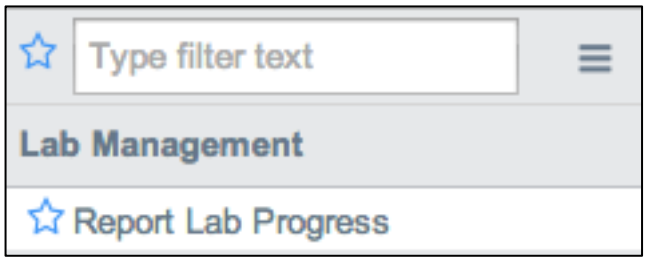
3. Verify that the **Medical & Internal Services** category contains the below catalog items.



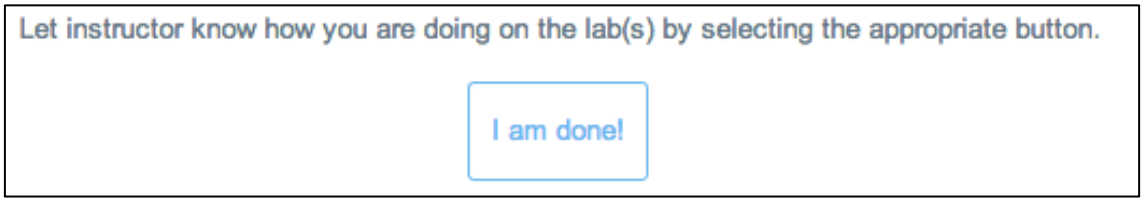
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Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am done!**



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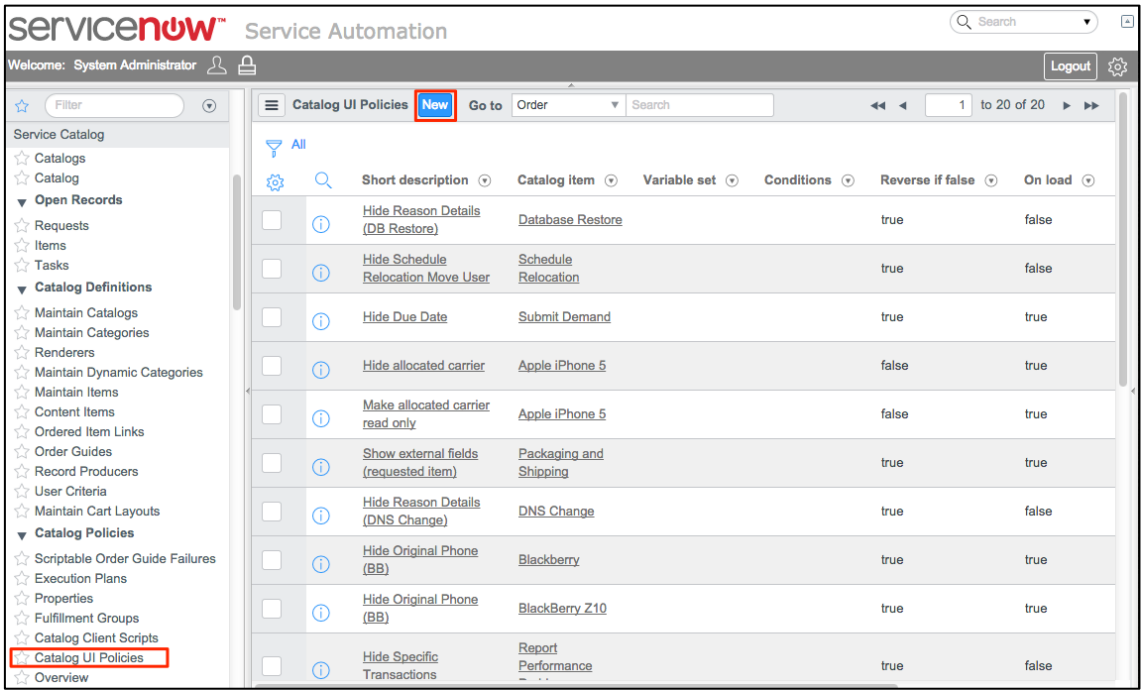
Lab Goal

This lab explains how to create UI Policies and associate them with variables.

Lab 3.0
Setting Up UI Policies (optional)

Create a Catalog UI Policy

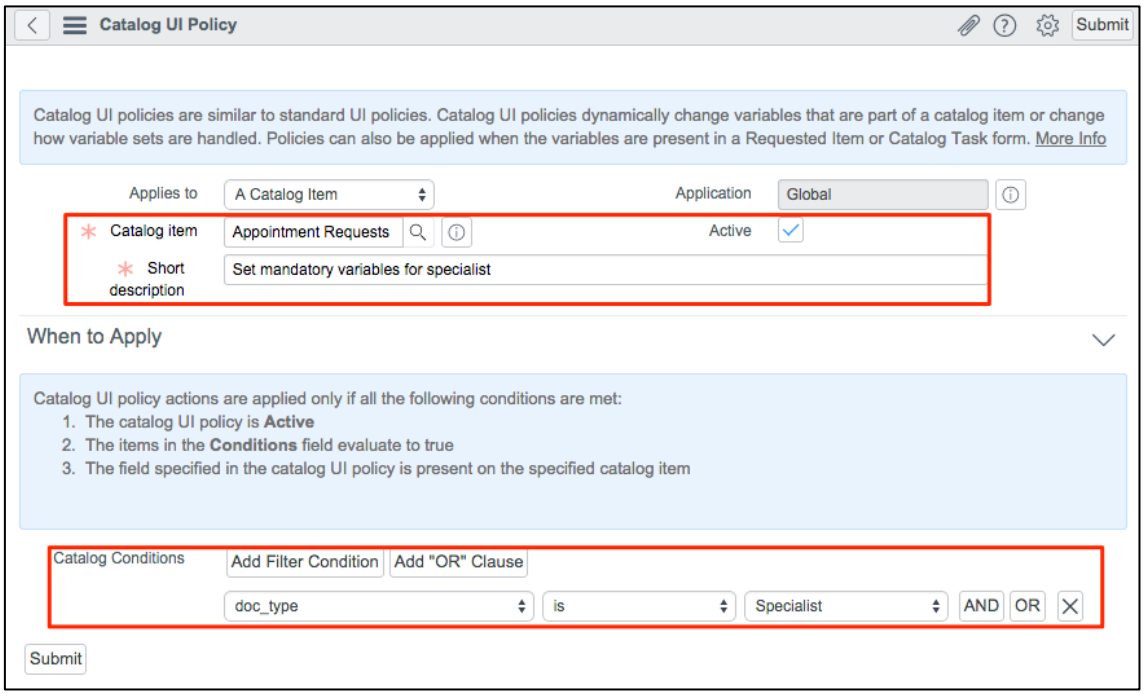
1. Navigate to **Service Catalog > Catalog Policies > Catalog UI Policies**.
2. Click **New**.



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3. Complete the Catalog UI Policy form as shown below.

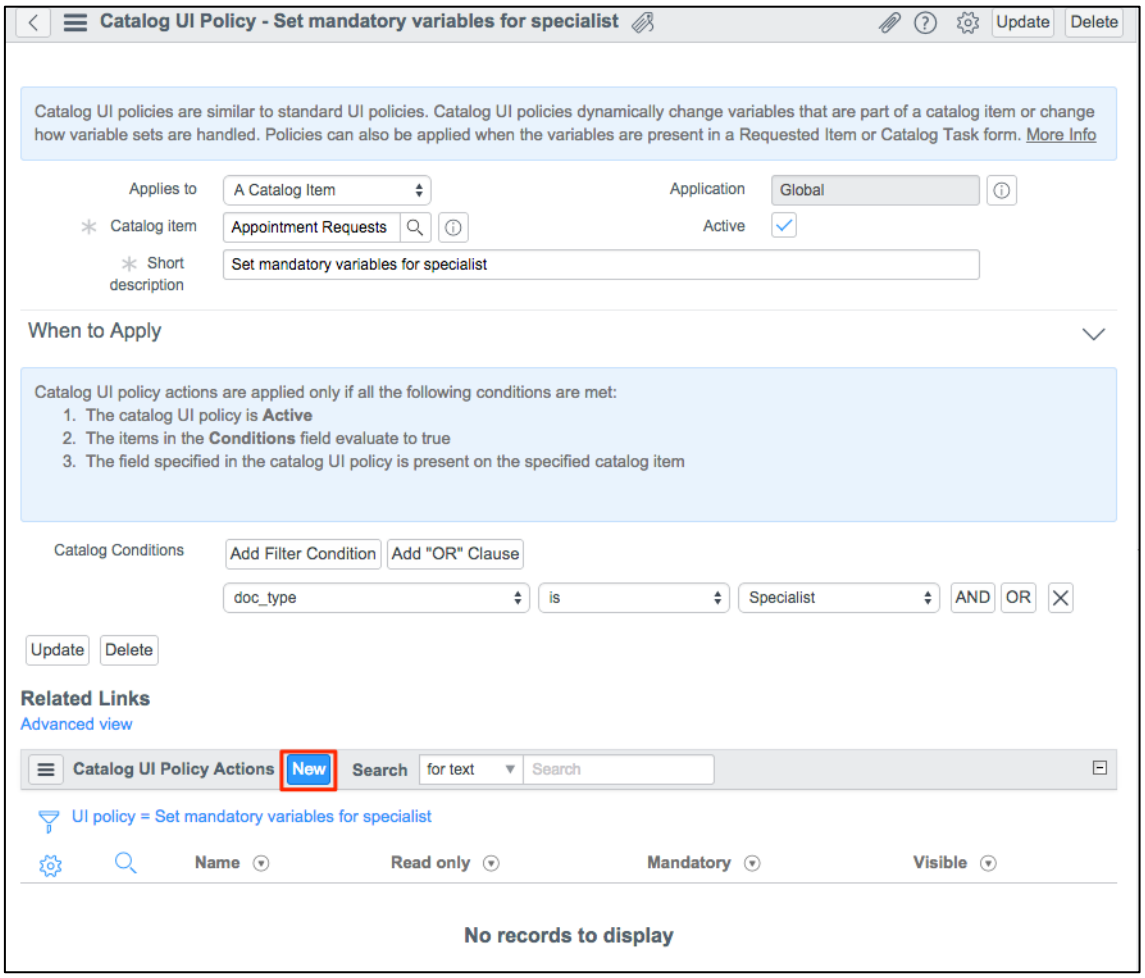
   Catalog Item: **Appointment Requests**
   Short Description: **Set mandatory variables for specialist**
   Catalog Conditions: **doc_type is Specialist**



4. Right-click the form header and select **Save**.

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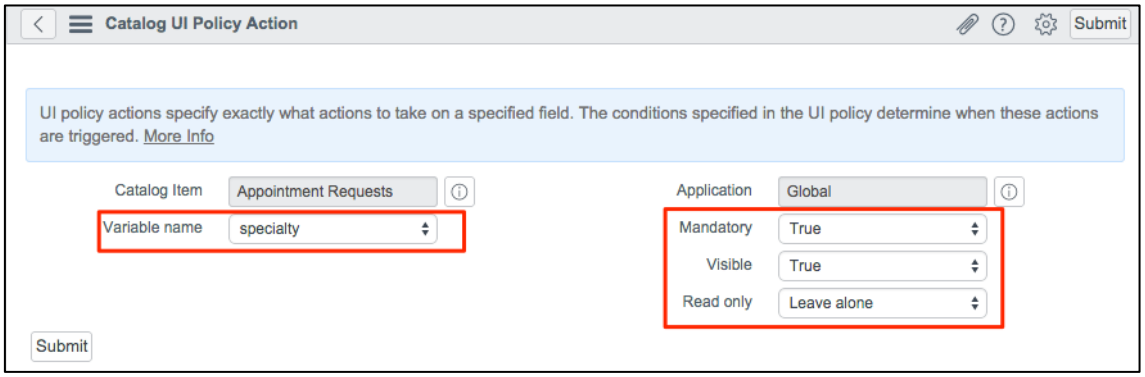
5. Click the **New** button under the **Catalog UI Policy Actions** section.



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6. Complete the Catalog UI Policy Action form as shown below.

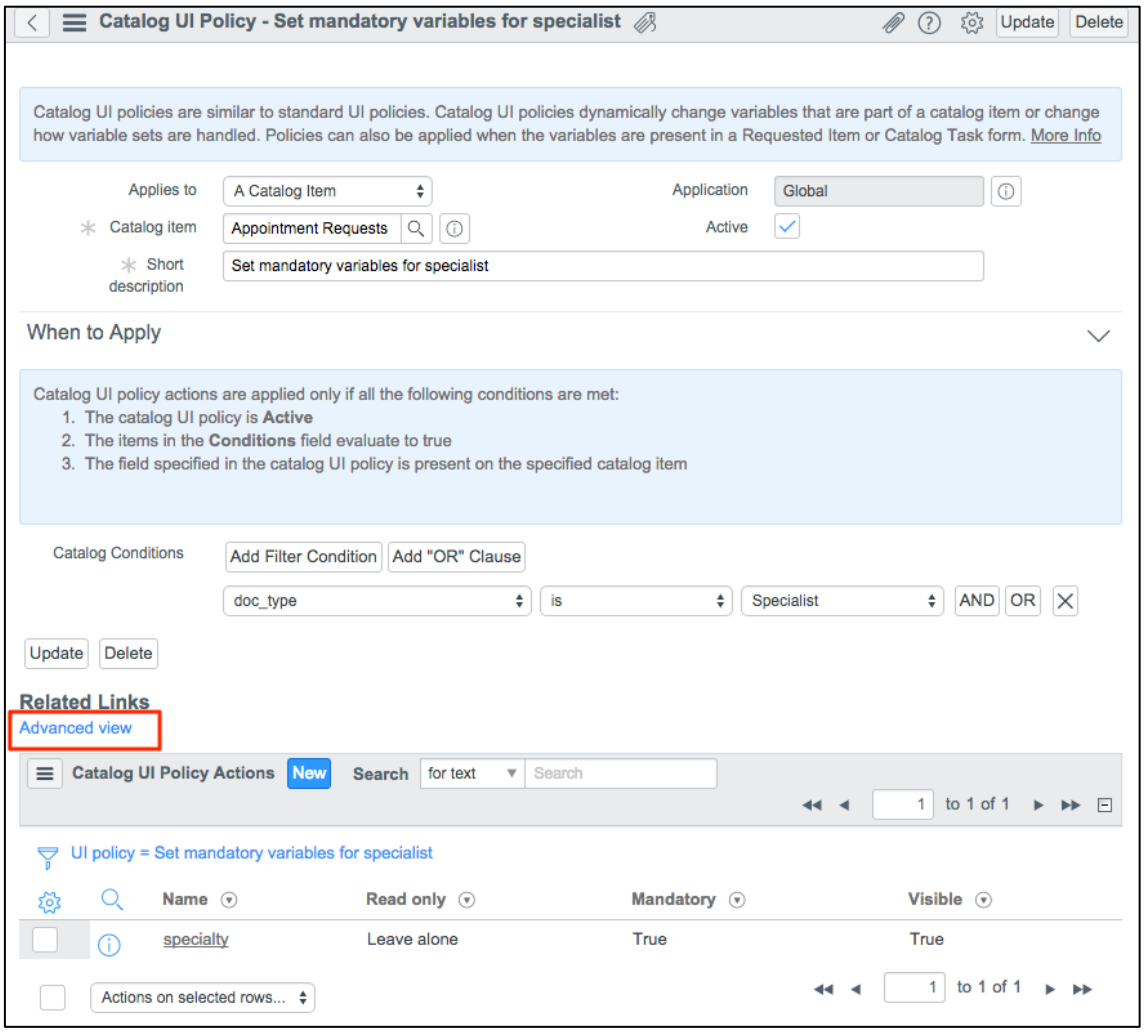
   Variable: **specialty**
   Mandatory: **True**
   Visible: **True**
   Read Only: **Leave Alone**



7. Click **Submit** to save the Catalog UI Policy Action.

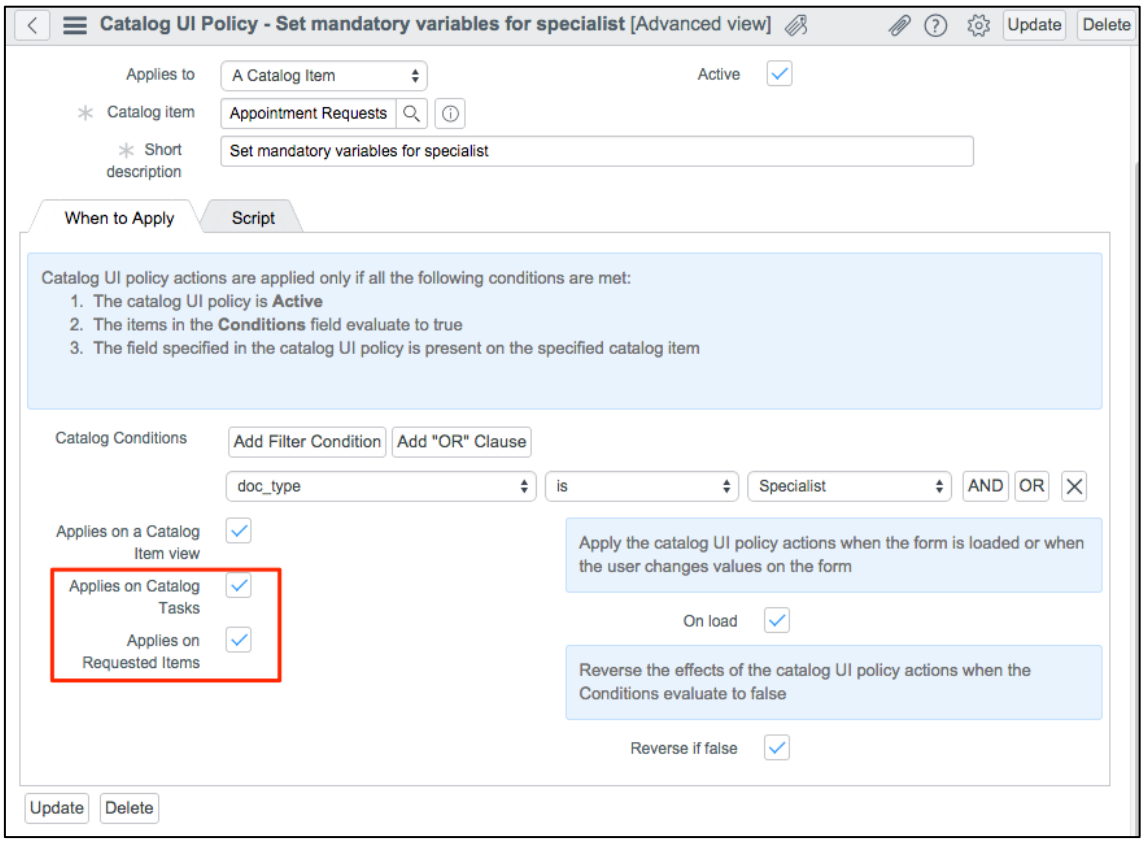
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8. Click **Advanced View** under the **Related Links**.



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9. Set **Applies on Catalog Tasks** and **Applies on Requested Items** to **True**.

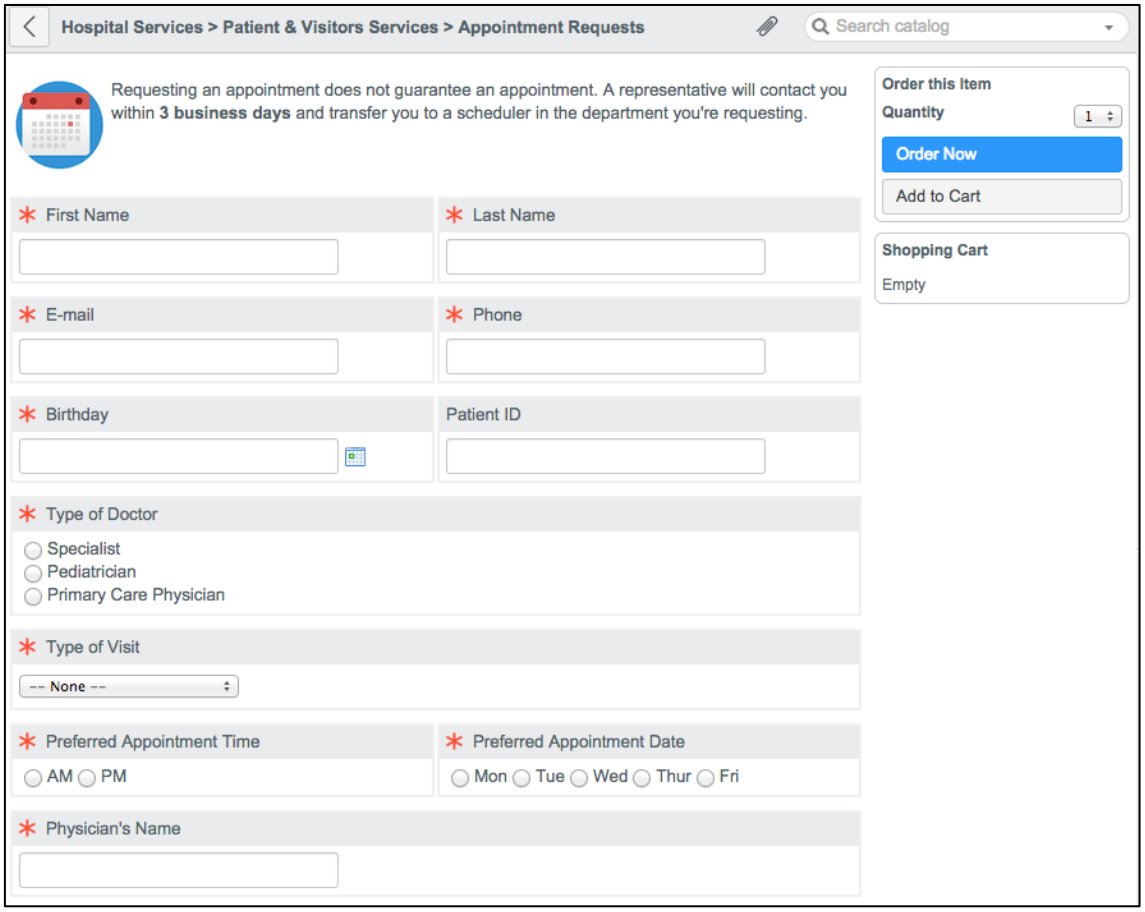


10. Click **Update** to save changes to Catalog UI Policy.

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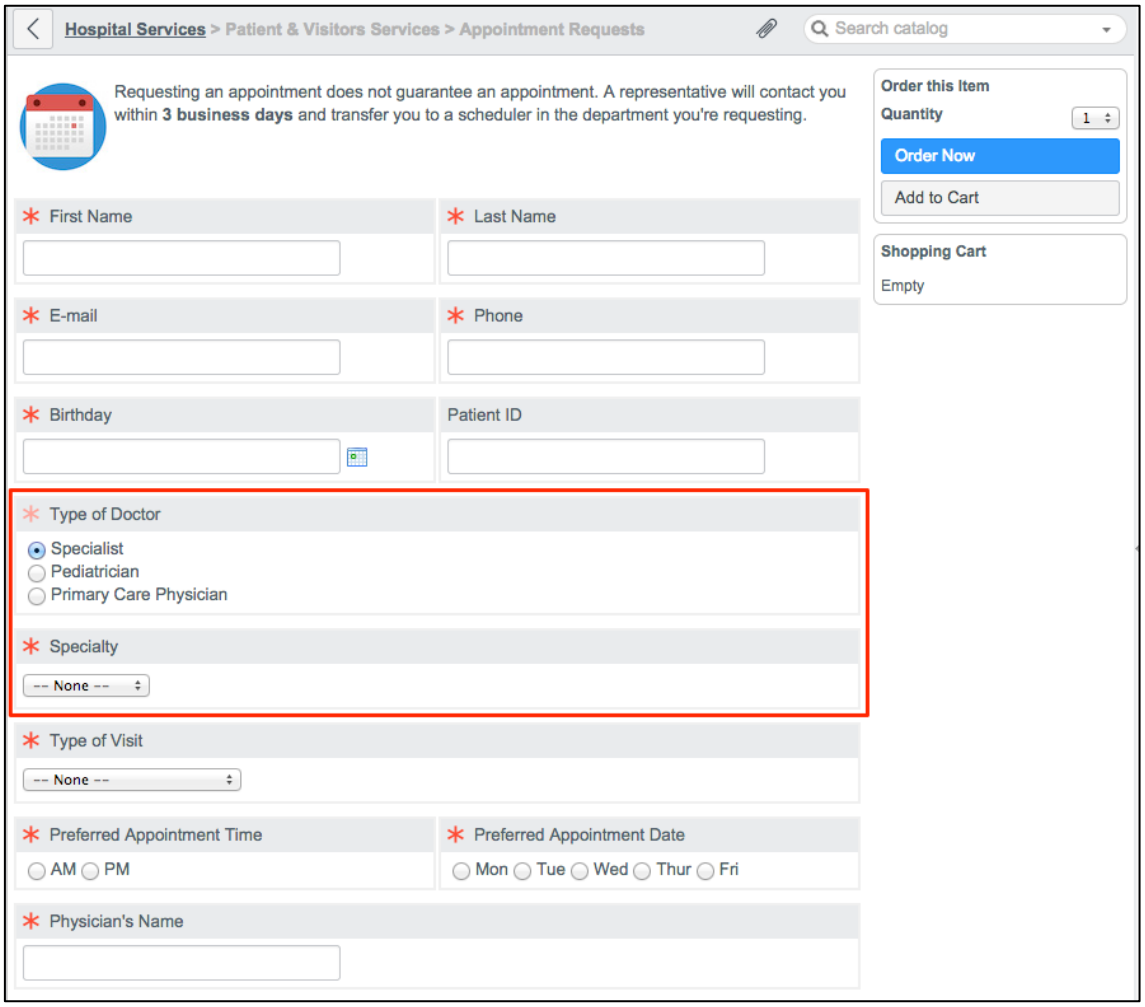
Lab Verification

1. Navigate to **Service Catalog > Catalog Definitions > Maintain Items.**
2. Open the catalog item **Appointment Requests.**
3. Click **Try It** in the header to preview the catalog item.
4. Verify that the Appointment Requests catalog looks like the example**.**



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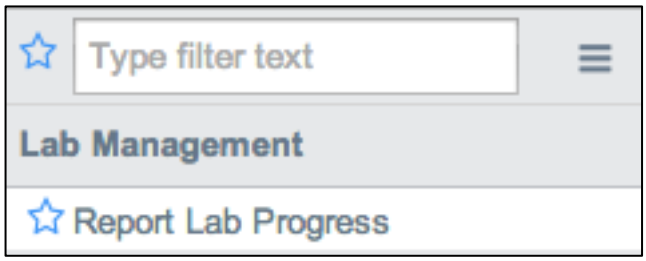
5. Select the value of **Specialist** for the **Type of Doctor** variable. The **Specialty** variable should appear and be **mandatory**.



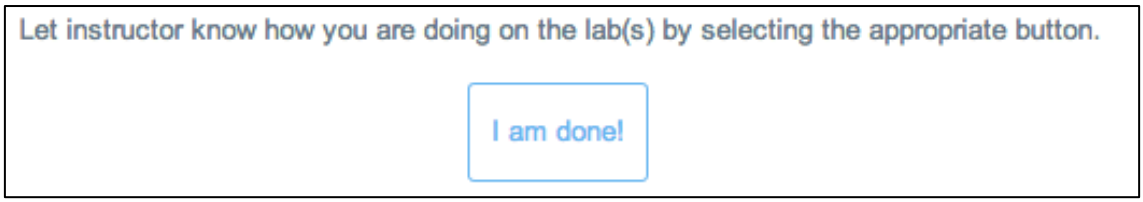
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Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

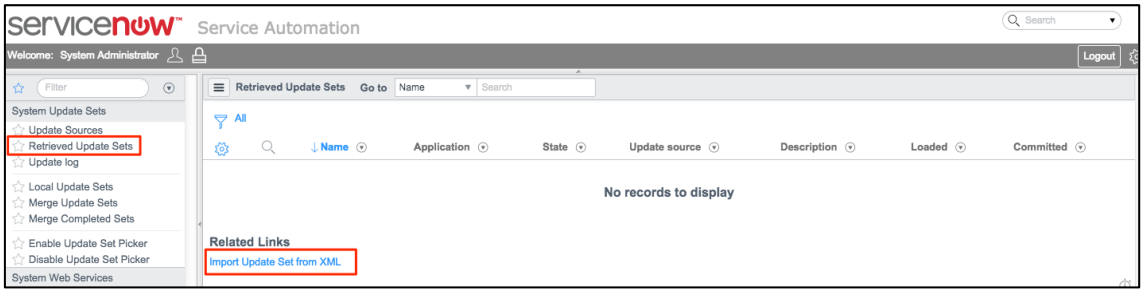
This lab explains how to associate a workflow with a catalog item.

Lab 4.0
Attach a Workflow

Import Appointment Requests Workflow

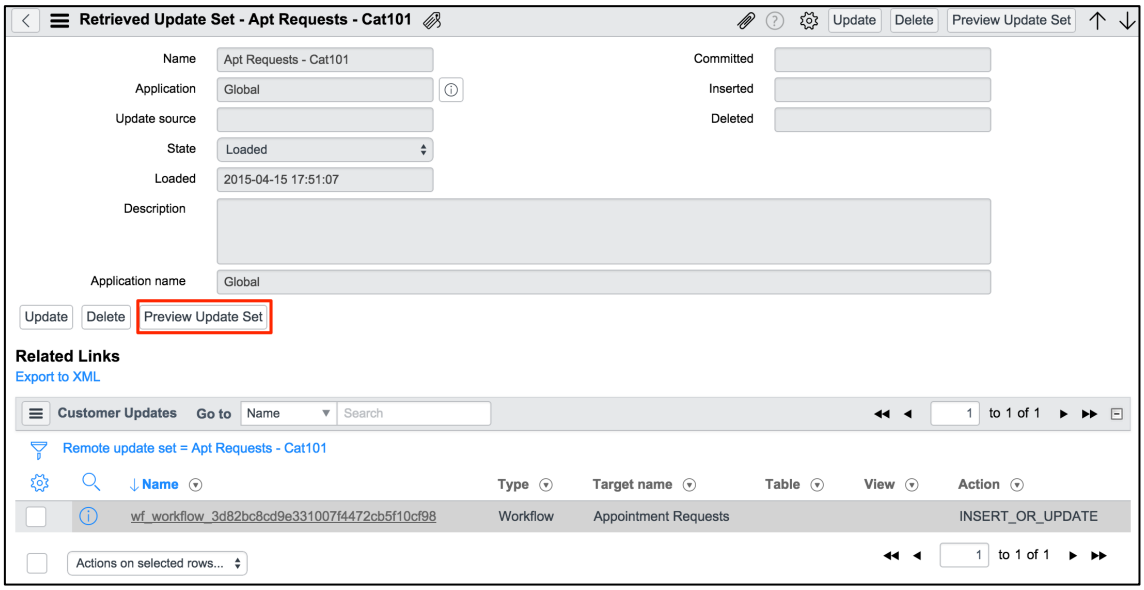
1. Navigate to **System Update Sets > Retrieved Update Sets**.

2. Click the **Import Update Set from XML** link under Related Links and upload the **Apt Requests - Cat101.xml** file.



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3. **Preview Update Set** and commit the update set.

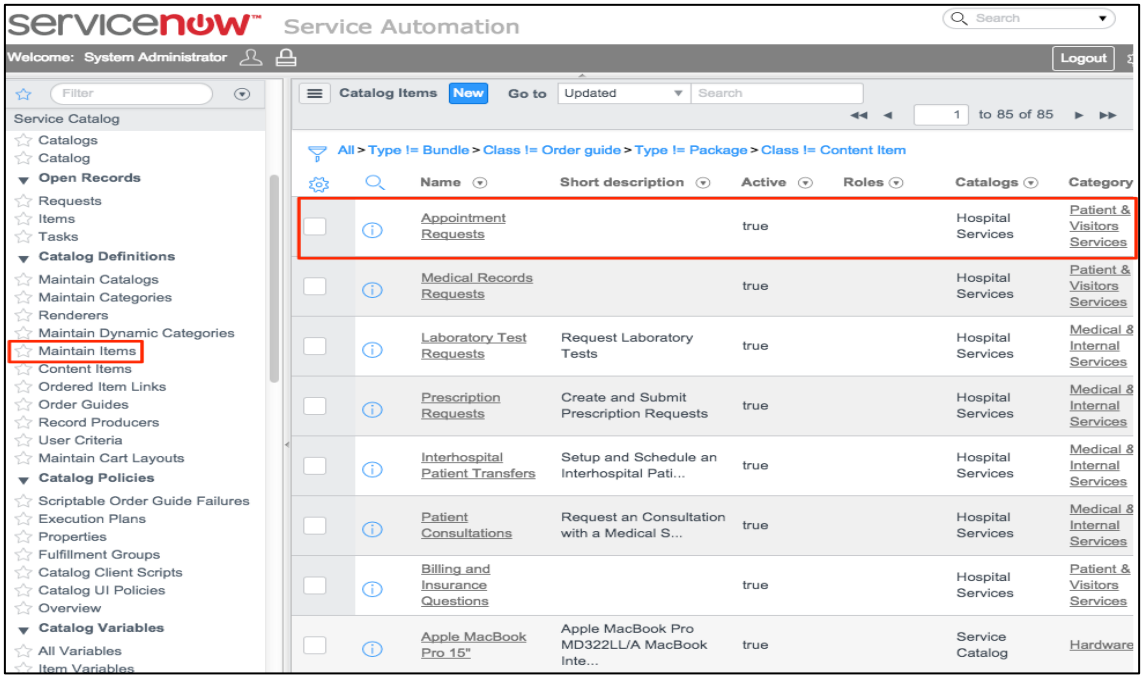


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Attached Workflow to Catalog Item

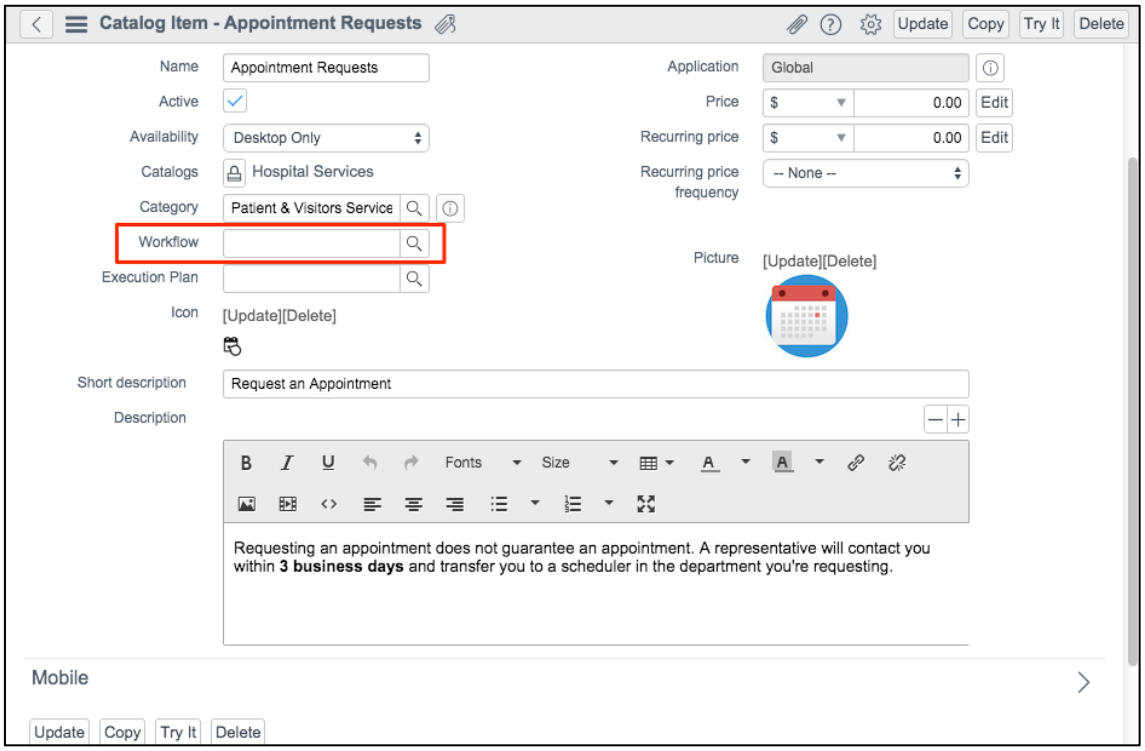
1. Navigate to **Service Catalog > Catalog Definitions > Maintain Items**

2. Select and open up the **Appointment Requests** catalog item.



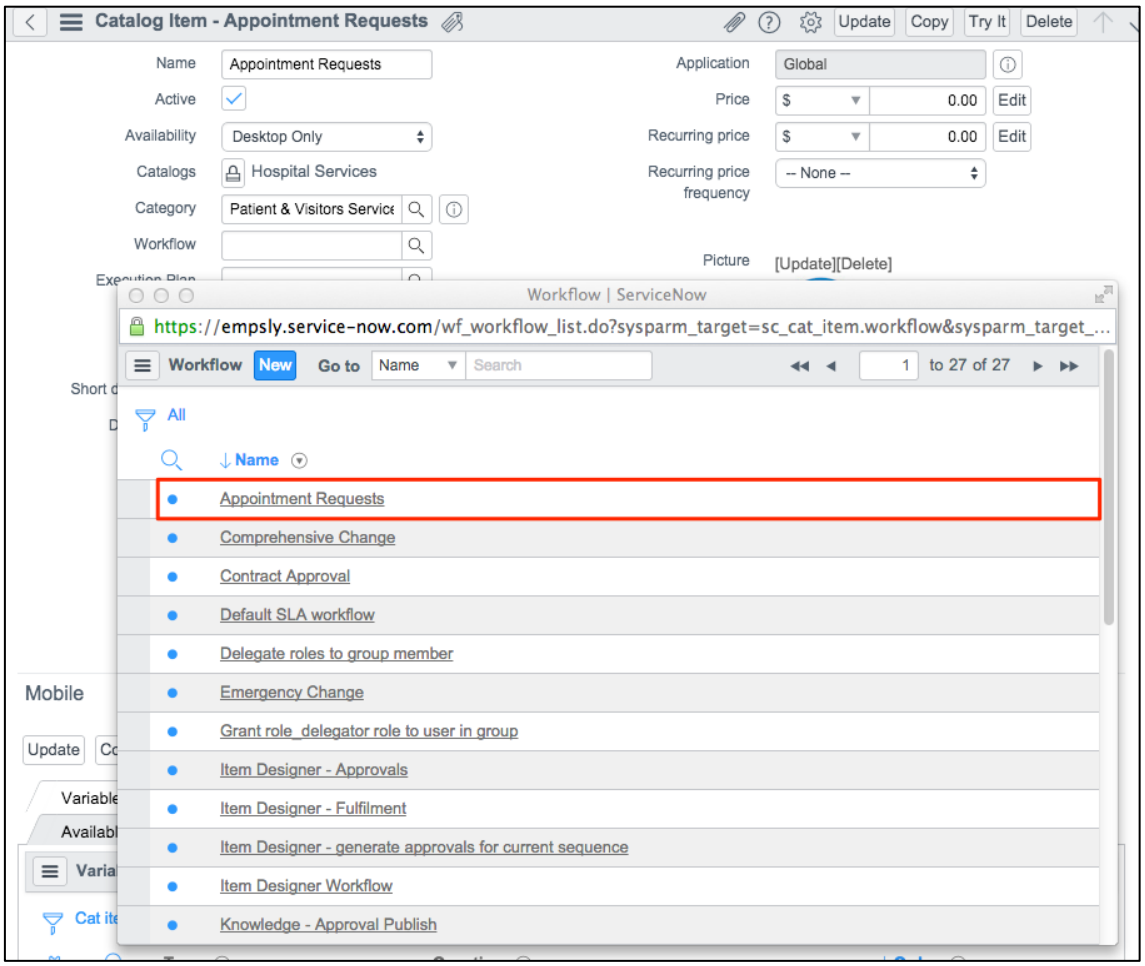
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3. Click the **reference icon** (magnifying glass) button for the **Workflow** field to select the desired workflow.



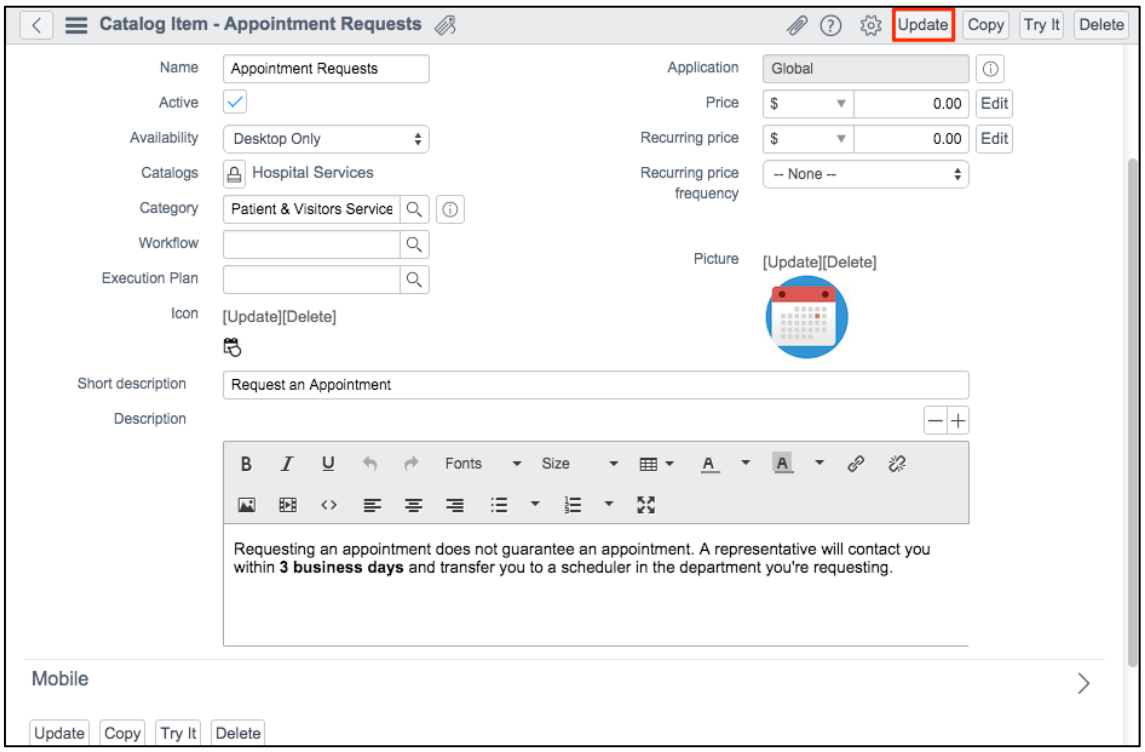
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4. After the pop-up appears, select the **Appointment Requests** workflow.



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5. Click **Update** to save changes to the catalog item.

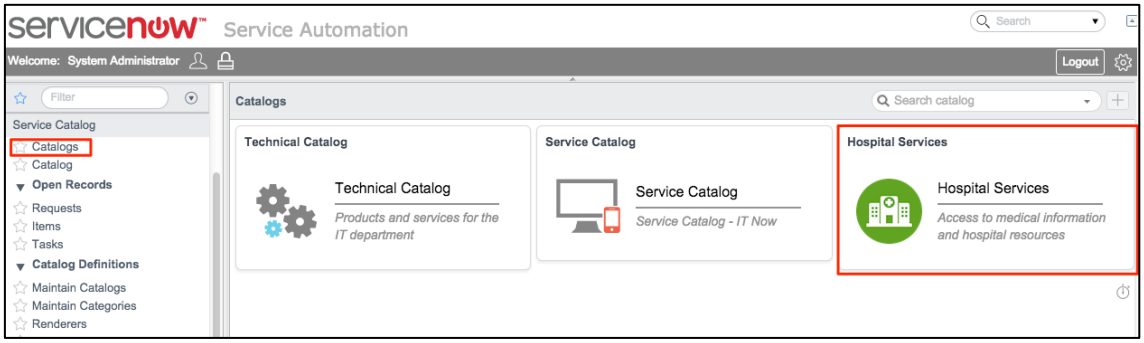


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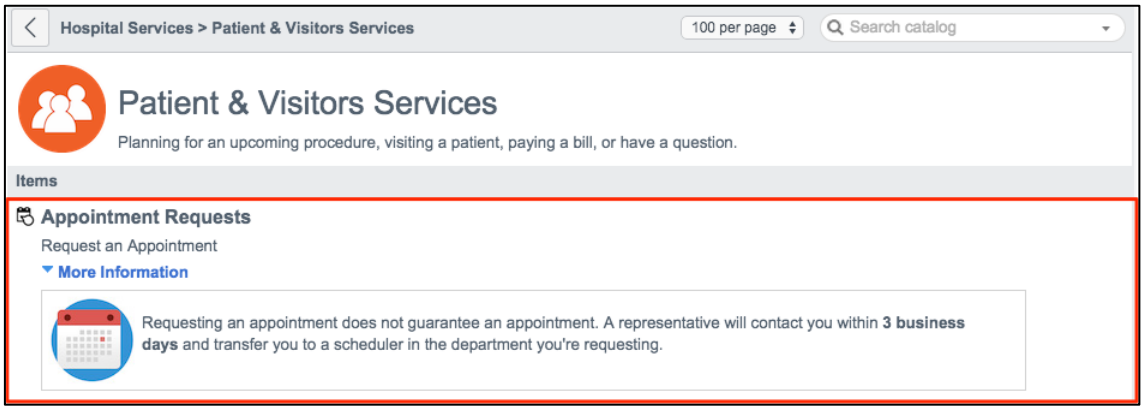
Lab Verification

1. Navigate to **Service Catalog > Catalogs.**

2. Select the **Hospital Services** catalog.



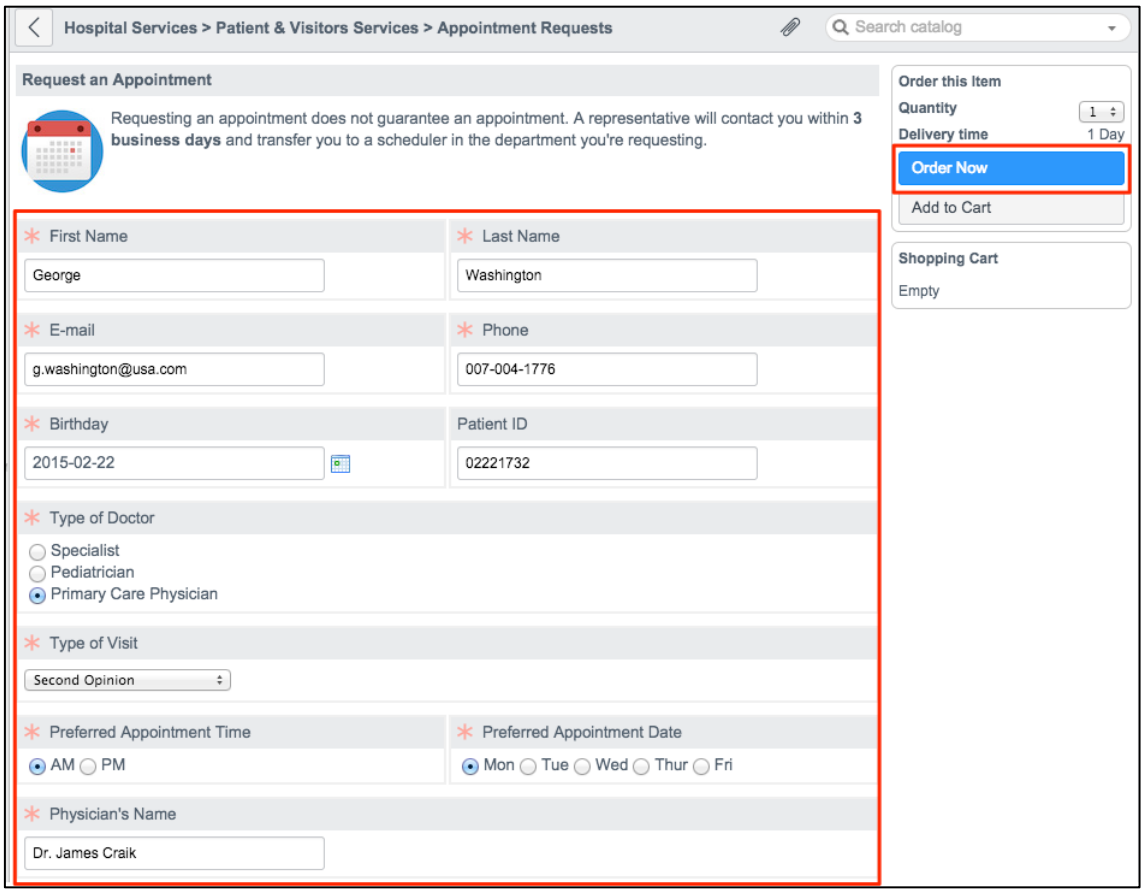
3. Select **Appointment Requests** under the **Patient & Visitors Services** category.



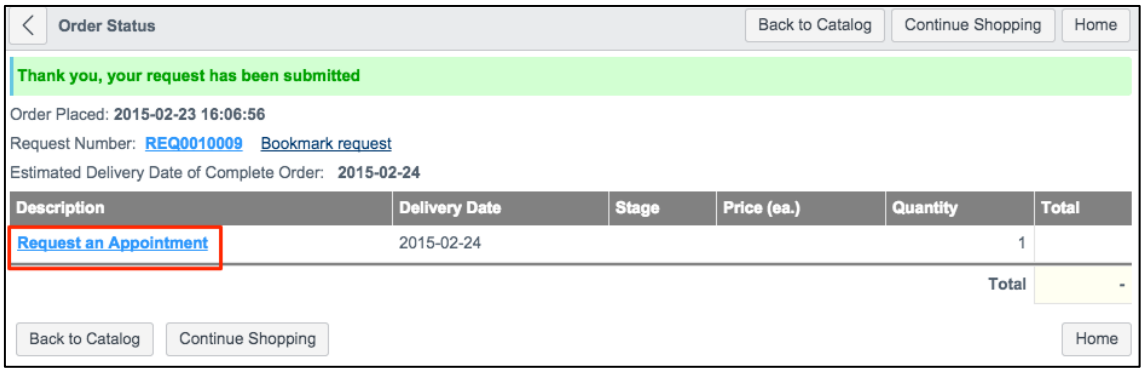
4. Provide the mandatory information.

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5. Click the **Order Now** button to submit the request.

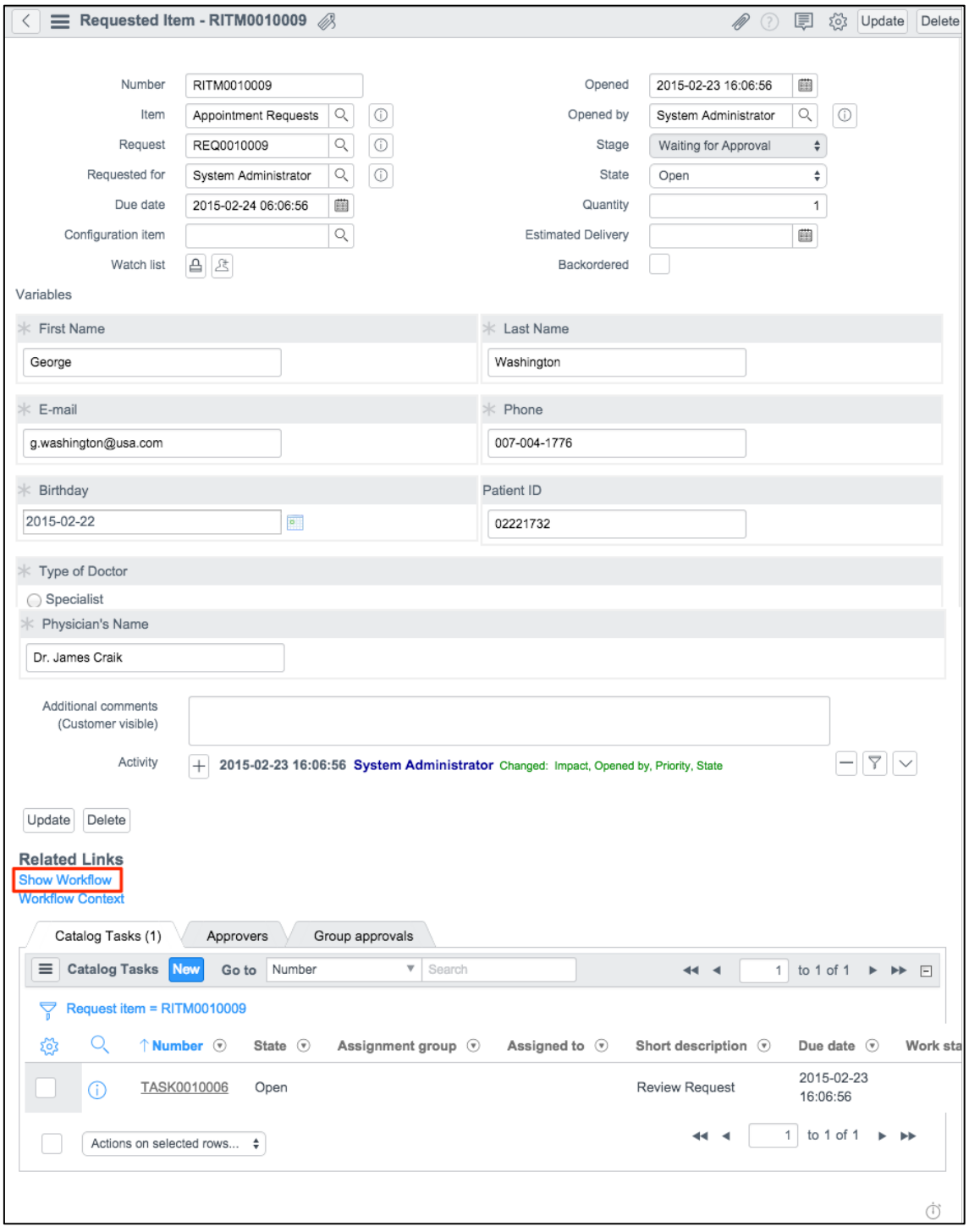


6. Click the **Requested Item number** to view the requested item.



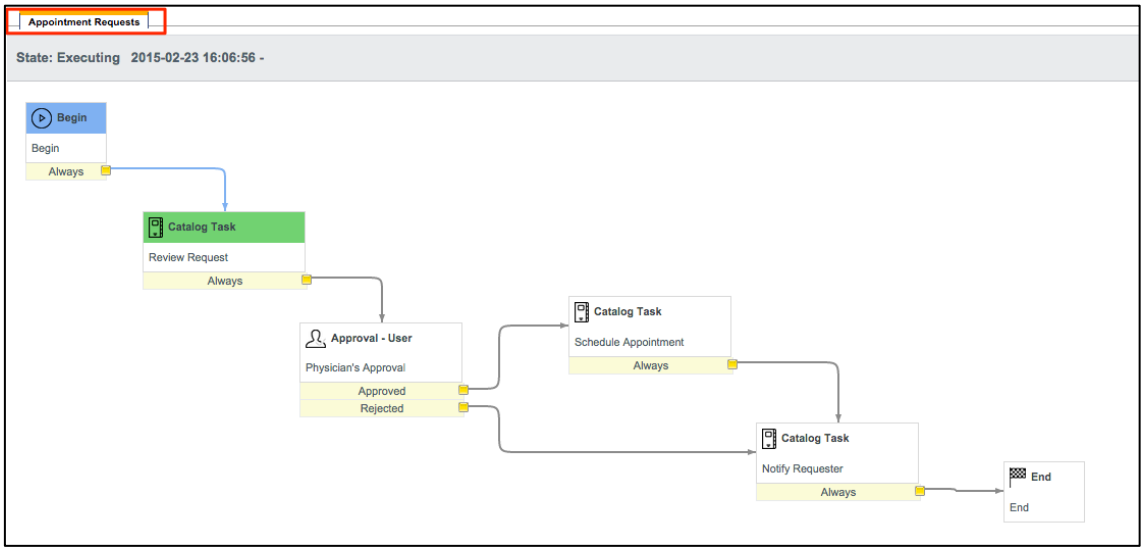
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7. Click the **Show Workflow** link under the **Related Links** to see active workflow.



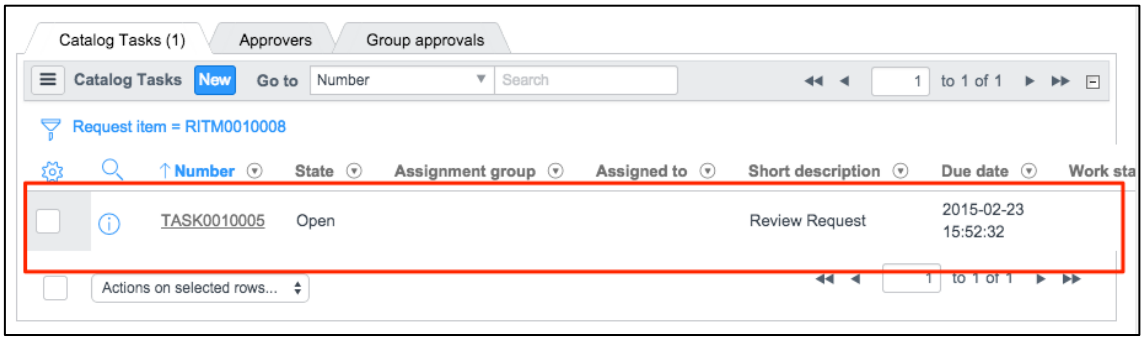
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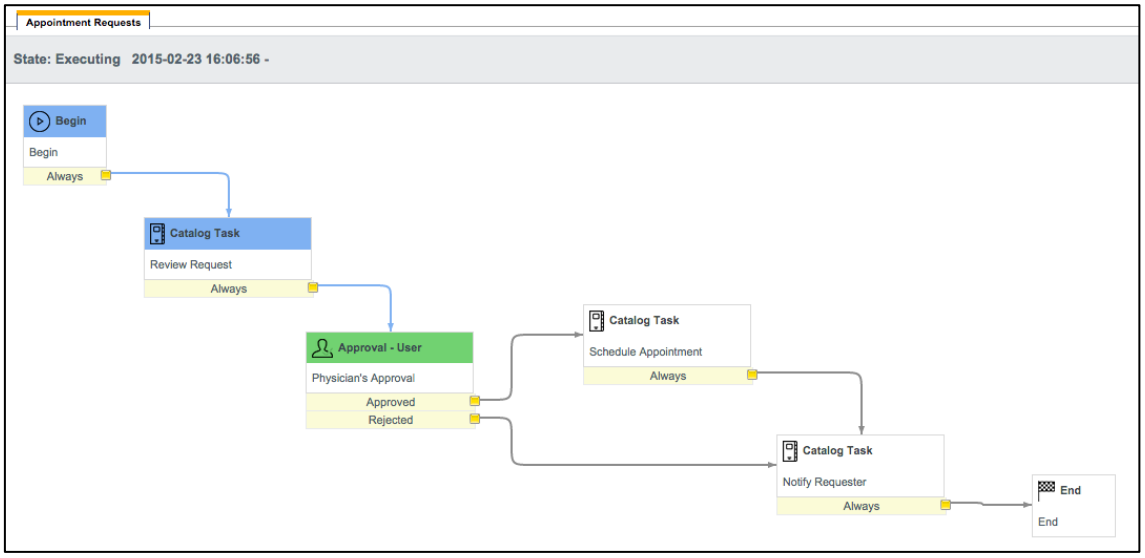
8. Confirm that the running workflow is **Appointment Requests**.



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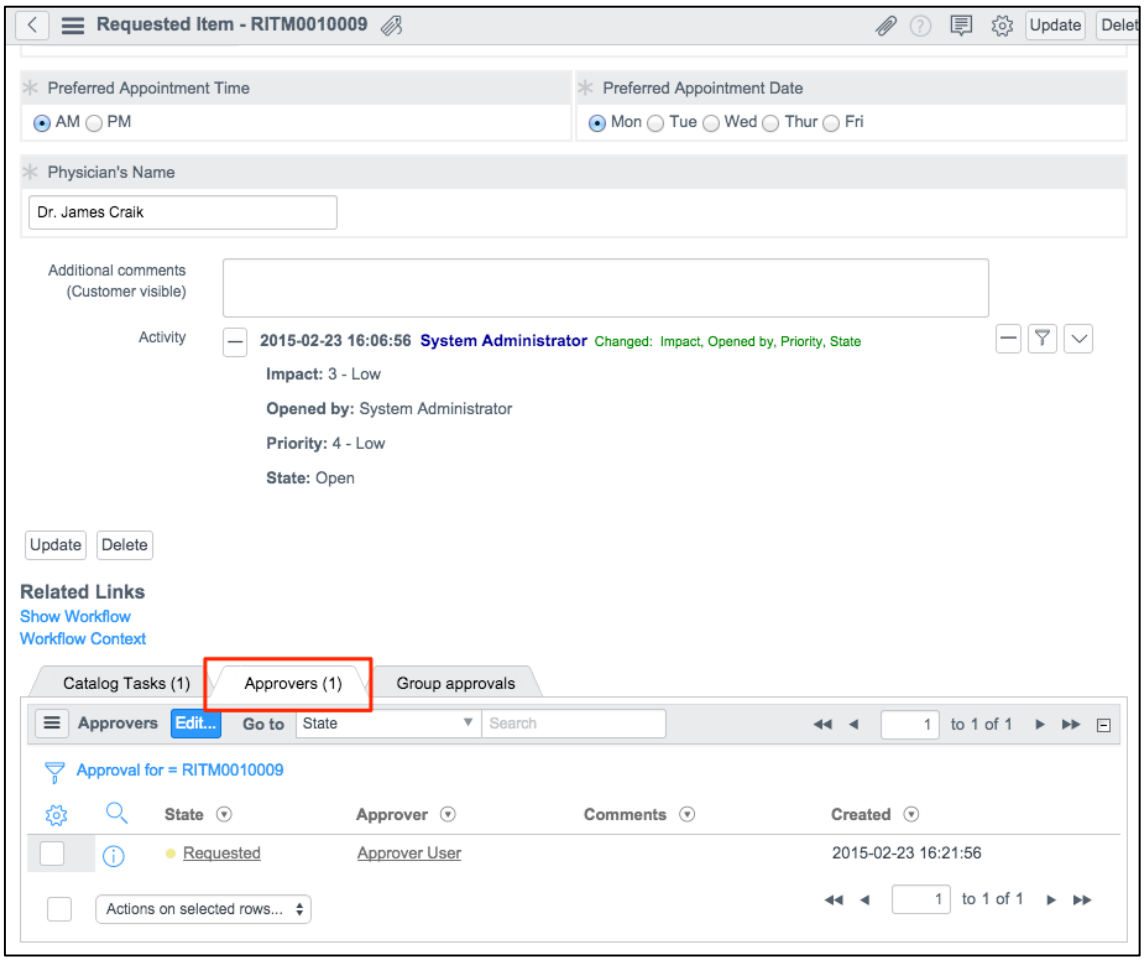
9. Close the **Review Request** task to move to the next step in the workflow.





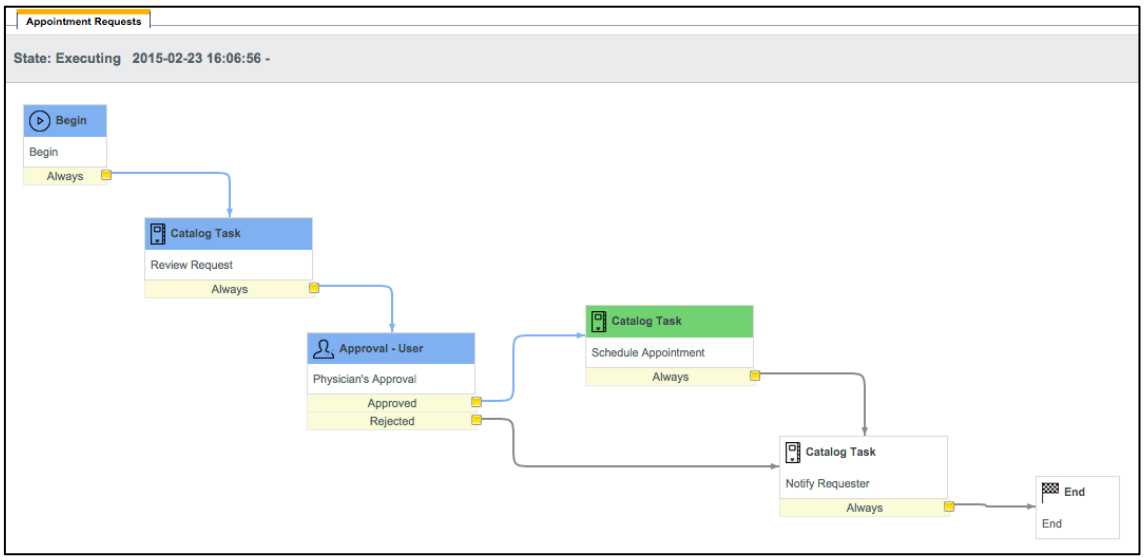
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10. Click the **Approvers** tab to view the approvals.



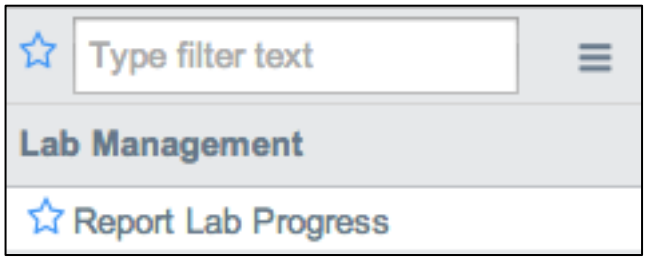
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11. Approve the request to move to the next step in the workflow.

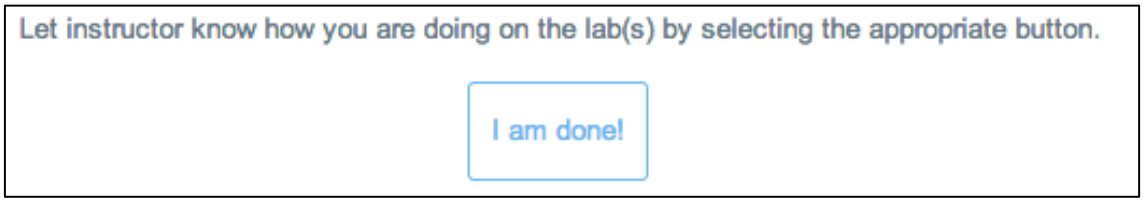


Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am done!**



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