Lab Guide

Service Catalog Design:

A Better User Experience

Hilton Rosenfeld & Mike Desmond

Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

Lab Sponsored by Microsoft Azure



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Lab Goal

This lab reviews the Service Catalog content from an **administrative perspective**. Subject areas include the following:

- Review the layout of the Service Catalog
- Open and evaluate the Apple iPhone 6 order form
- Assess the technical aspect of the Apple iPhone 6 order form

Lab 1.1
Service Catalog Overview
administrative

Log on to the Training Instance

- Navigate to the unique instance URL provided.

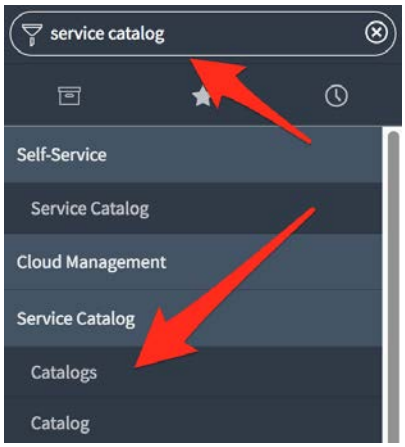


- Log in with the provided administrator credentials.

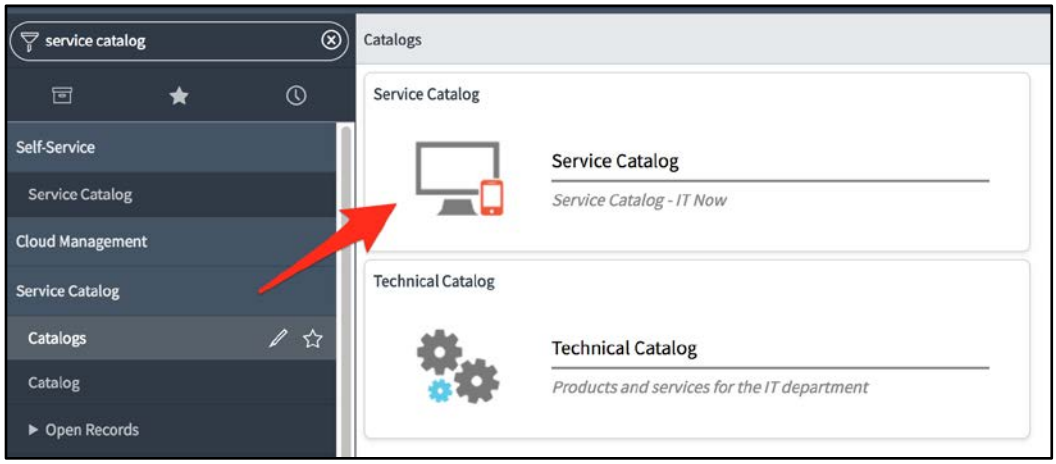
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Review the Layout of the Service Catalog

1. Using the search in the upper-left corner, navigate to **Service Catalog > Catalogs**.

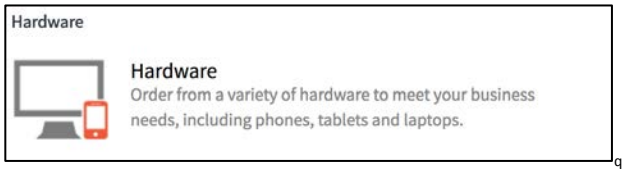


2. Click the catalog named **Service Catalog** from the available Catalogs.



3. Review the layout of the **Categories** in this catalog.

4. Click on the **Hardware** Category.



q

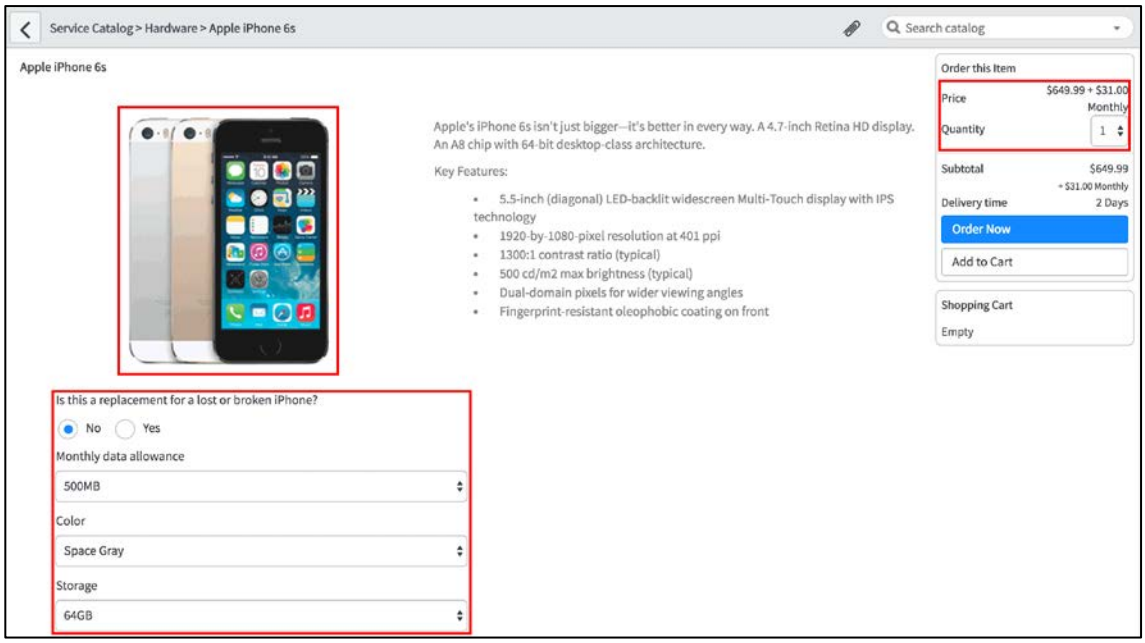
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5. Scroll through the items within the hardware category and locate the **Apple iPhone 6s** item. Expand out the Preview caret.



6. Click **Apple iPhone 6** to load the request form. Note the following things:

   - Cell phone image
   - Cost of the item
   - Fillable fields on the form



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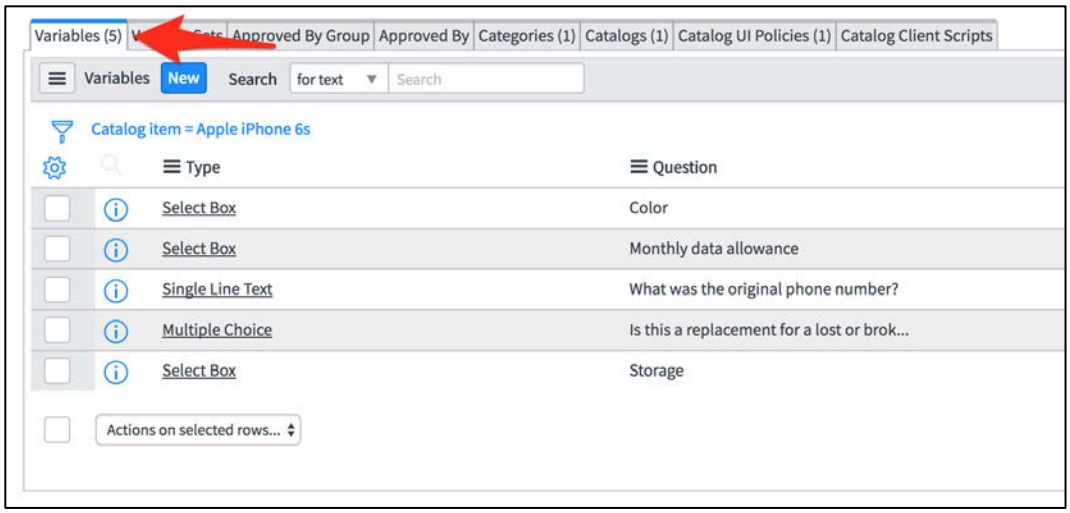
Review the Technical Aspect of the Form

1. Right-click in the gray header above the form and click **Configure Item**.



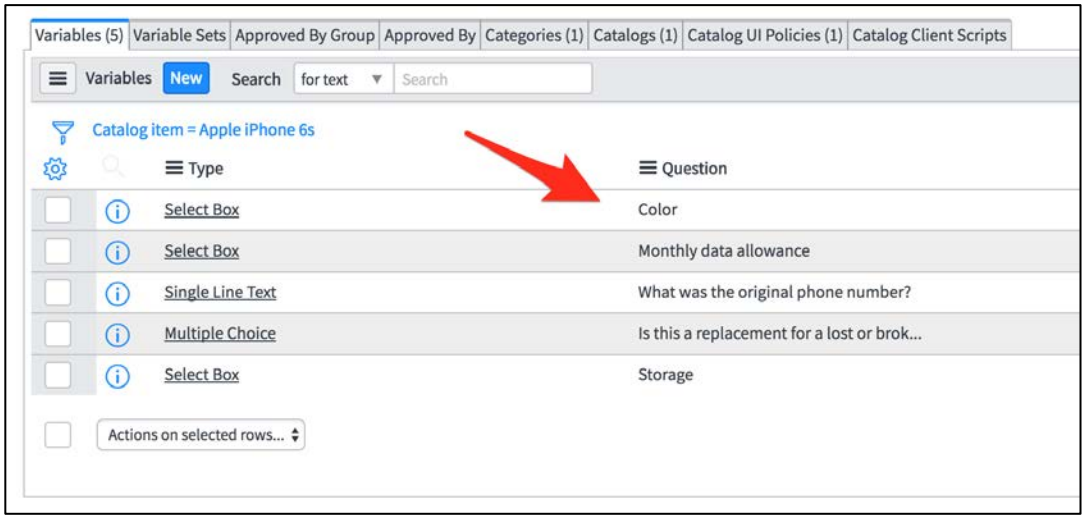
2. Review the different fields and compare what you see on this page to what you see on the order form.

3. Scroll to the bottom of the page and click **Variables** to see the variables that were created for the form.



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4. Review the **Question** column and see how the questions are tied to corresponding columns.



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Lab Goal

Lab 1.1 Service Catalog Overview
employee

This lab reviews the Service Catalog content from an employee perspective. Subject areas include the following:

- Review the layout of the Service Catalog
- Open and complete the Apple iPhone 6 order form
- Assess the confirmation of order

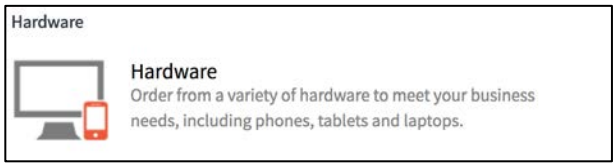
The goal of this lab is to review the Service Catalog and its components from the employee view. It is important to know what the employee sees in the Service Catalog prior to creating anything new. This helps piece together what the administrator creates on the back end.

Log on to the Training Instance

1. Navigate to the unique instance URL provided.
2. Log in with the provided employee credentials.

Review the Layout of the Service Catalog

1. Using the search in the upper-left corner, navigate to **Self Service > Service Catalog**.
2. Click on the **Hardware** Category.

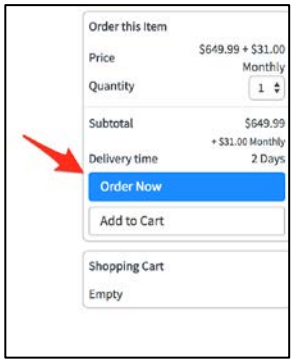


3. Scroll through the list of hardware catalog items and click **Apple iPhone 6**.



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4. Click **Order Now**.



5. The next screen confirms the order. Review the details and click the caret under **Stage** to review what each stage entails.



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Lab Goal

Lab 1.2 Create a Catalog and Categories

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

The goal of this lab is to create a new Catalog that houses new request items created in later labs. It is important to ensure that all Service Catalog Request Items have a Catalog to reside within.

Log on to the Training Instance

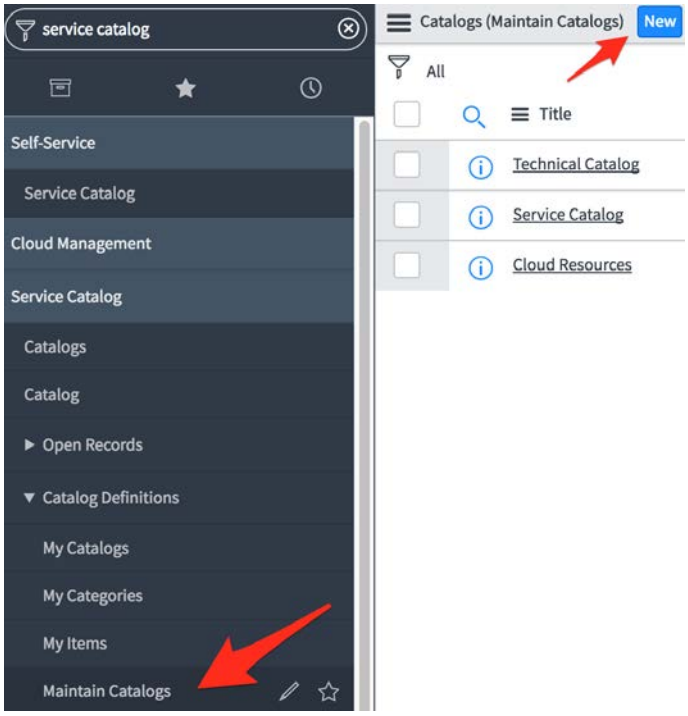
1. Navigate to the unique instance URL provided.
2. Log in with the provided employee credentials.

Create a Catalog

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

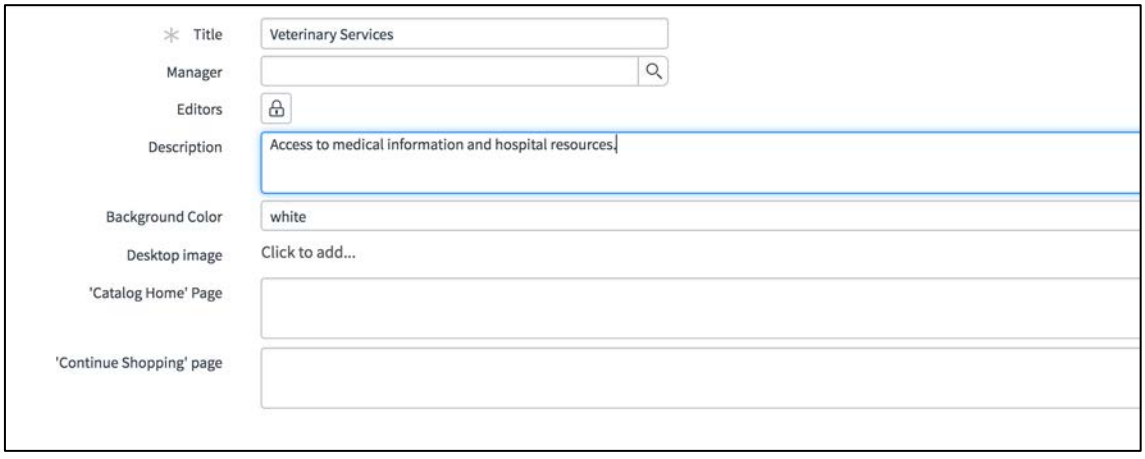
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2. Click the **New** button.



3. Complete the form with the information below.

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

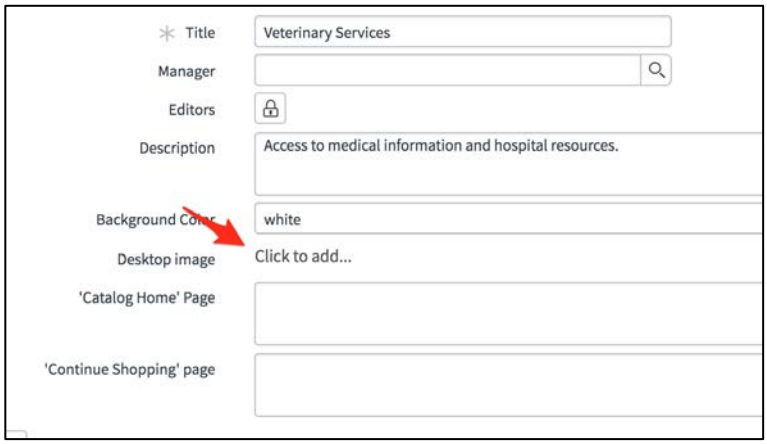


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4. Right-click the form header and click **Save**.



5. Set the **Desktop image** by clicking on the **Click to add…** link and upload **MedicalServices.png**.



6. Click **Update**.



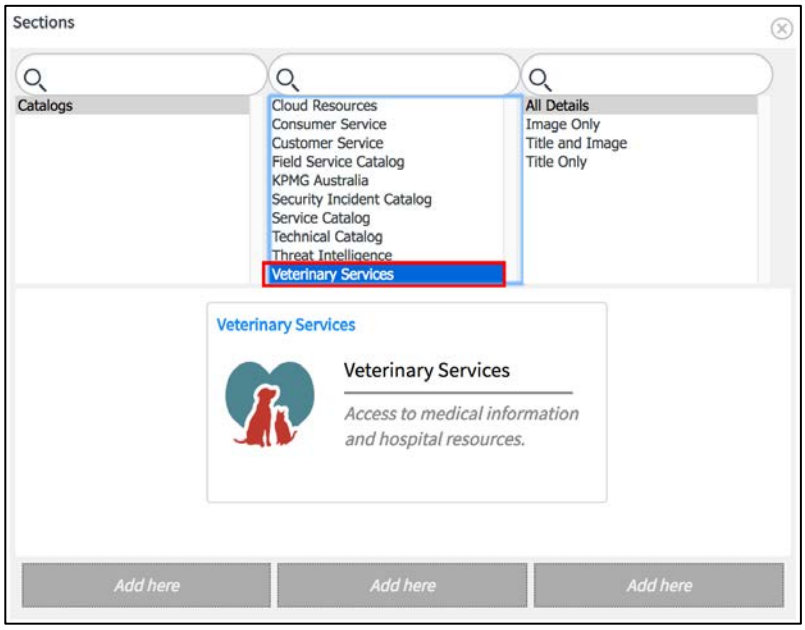
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Add a Catalog to Catalogs Homepage

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



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



3. Click **Add here** in the right column.

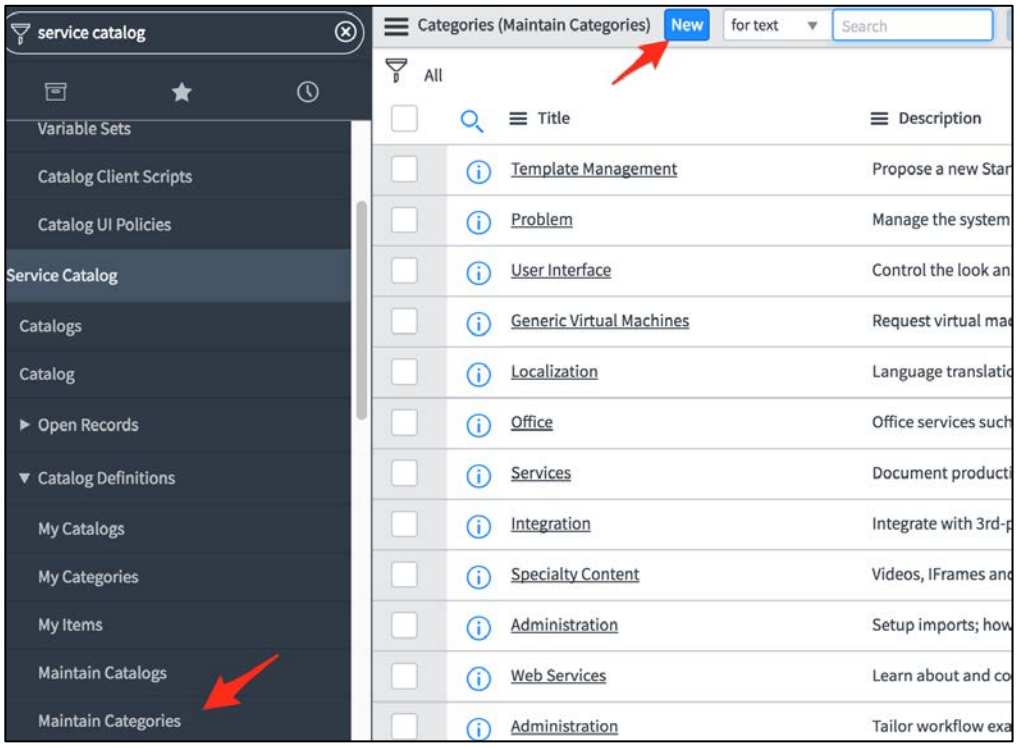
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4. Close the pop-up window and view the updated **Catalogs** homepage.



Create Categories

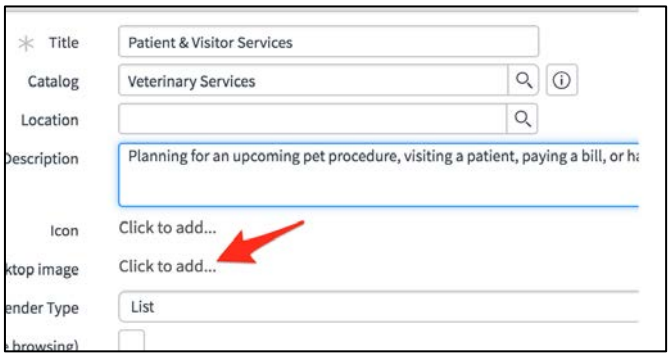
1. Navigate to **Service Catalog > Maintain Categories**. Click the **New** button.



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2. Complete the form with the following information:

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



3. Click **Update**.

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

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

   Title**: Programs & Classes**
   Catalog**: Veterinary Services**
   Description**: Information about community pet events and classes.**
   Desktop Image**:** Click the **Click to add…** link and upload **CommServices.png.**

   Title**: Conditions & Diseases**
   Catalog**: Veterinary 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 upload **Diseases.png.**

5. Click **Update**.

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Customize a Catalog Homepage

1. Navigate to **Service Catalog > Catalogs > Veterinary Services** catalog.
2. Click the **+** 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.

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



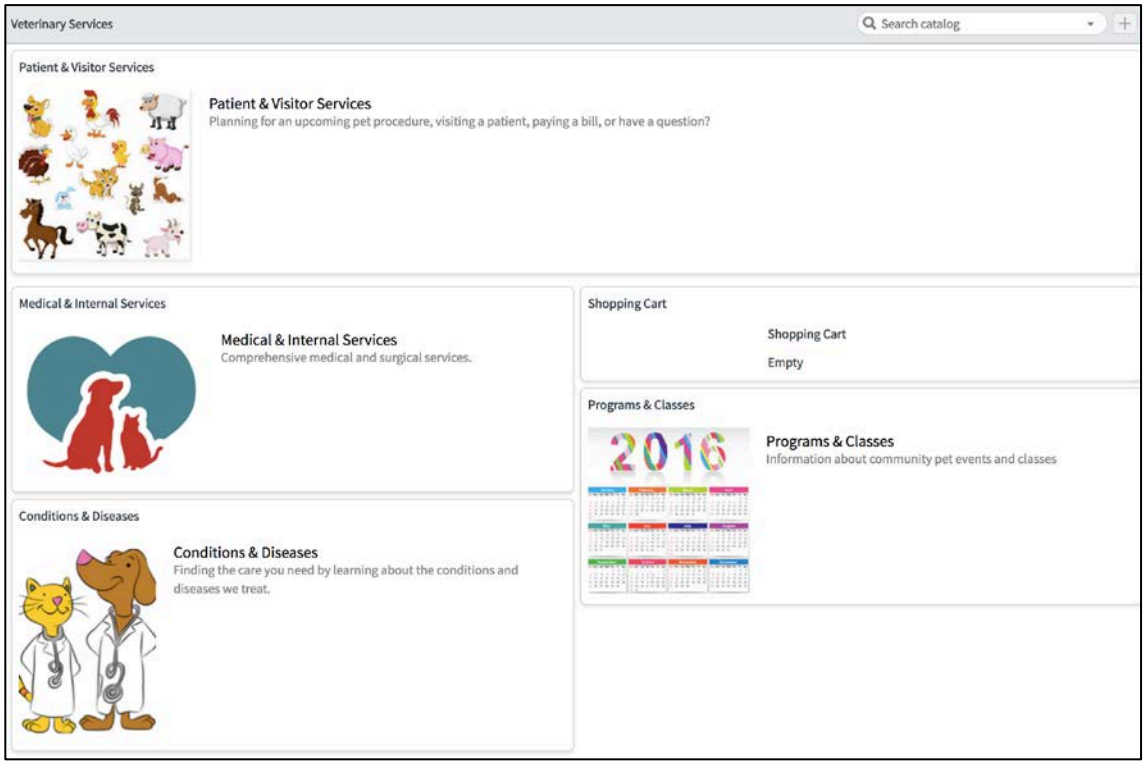
4. Close the **pop-up window**.

Lab Verification

1. Navigate to **Service Catalog > Catalogs**.
2. Click the **Veterinary Services** catalog.

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3. Verify that the **Veterinary Services** homepage looks like the example.



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Lab Goal

Lab 1.3 Create a Catalog Item

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

Create a Variable Set

1. Navigate to **Service Catalog > Catalog Variables > Variable Sets**.

2. Click **New**.



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 click **Save**.

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:

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6. Click **Submit**.

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:

   Type: Single Line Text
   Name: email
   Order: 20
   Variable Set: patient_information
   Mandatory: True
   Question: E-mail Address:

   Type: Single Line Text
   Name: phone
   Order: 25
   Variable Set: patient_information
   Mandatory: True
   Question: Phone Number:

   Type: Date
   Name: birthday
   Order: 30
   Variable Set: patient_information
   Mandatory: True
   Question: Birthday

   Type: Single Line Text
   Name: patient_id
   Order: 35
   Variable Set: patient_information
   Question: Patient ID

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

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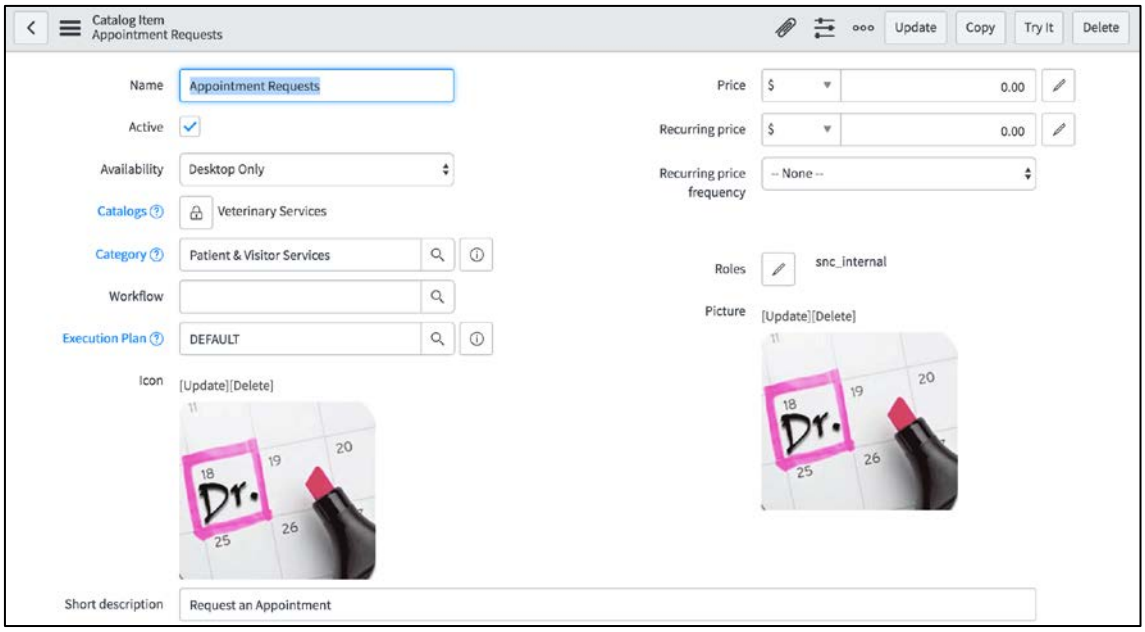
Create a Catalog Item

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

2. Click **New**.

3. Configure the **Item** as follows:

   Name: Appointment Requests
   Catalogs: Veterinary Services
   Category: Patient & Visitor Services
   Short Description: Request an Appointment
   Description: Requesting an appointment does not confirm the appointment has been booked. A representative will contact you within 2 business days to confirm the booking. If this is an emergency, please contact the office at 555-555-5555 for assistance.
   Icon: Click to add… Appointments_icon.png **(downloaded earlier)**
   Picture: Click to add… Appointments.png **(downloaded earlier)**



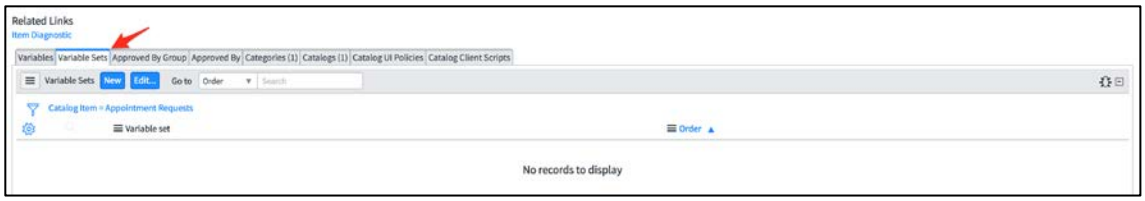
4. Click the **Update** button to create the catalog item.

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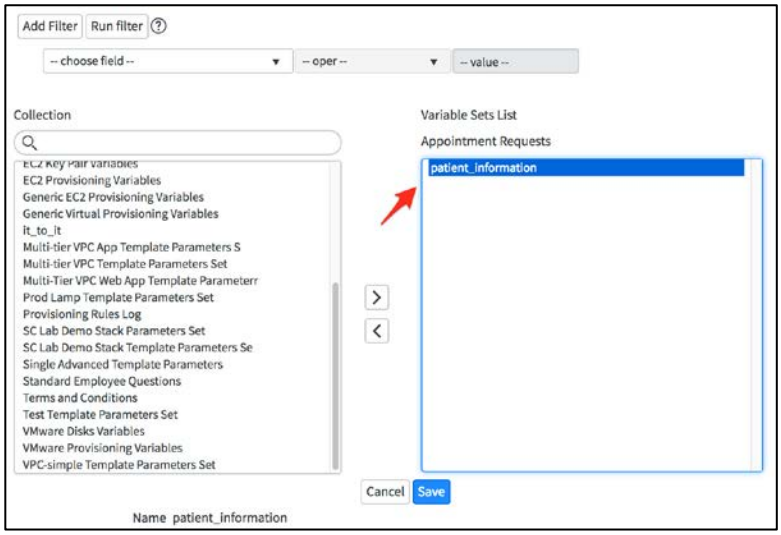
Add Variable Set to Catalog Item

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 add the **patient_information** to the Variable Sets List (right side)



4. Click **Save**.

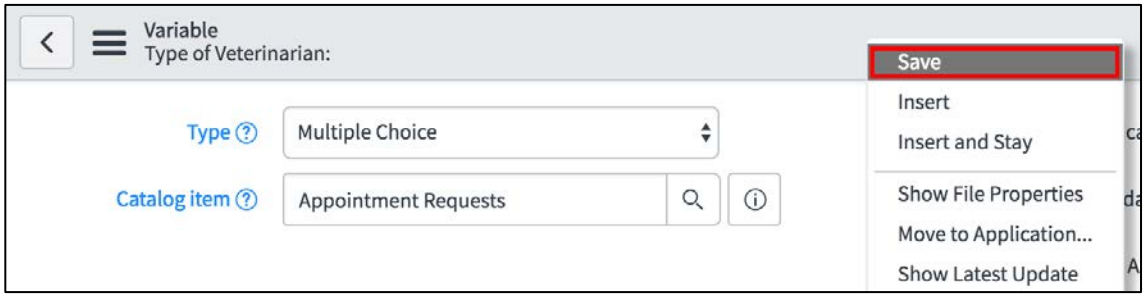
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Create Variables

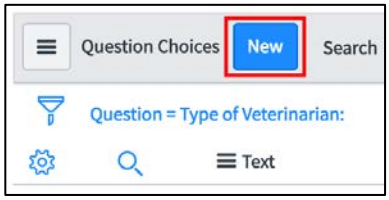
1. Click the **Variables** tab under Related Lists.
2. Click **New**.
3. Configure the variable as follows:

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

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



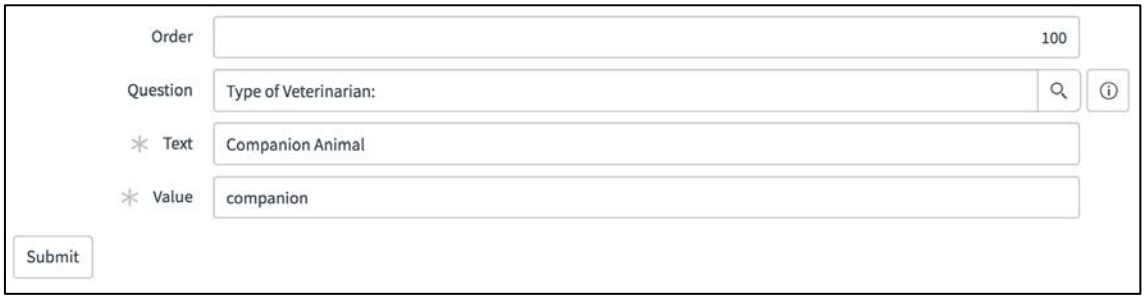
5. Click the **New** button under the **Question Choices** section.



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6. Configure the form as follows:

   Order: 100
   Text: Companion Animal
   Value: companion



7. Click **Update** to save choice.

8. Repeat **Steps 1-3** for the below choices.

   Order: 200
   Text: Equine
   Value: equine

   Order: 300
   Text: Animal Food
   Value: food



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9. Repeat **Steps 2-8** for the following variables:

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 Patient
Value: new_patient

Order: 200
Text: Existing Patient
Value: existing_patient

Order: 300
Text: Post ER Check-up
Value: post_er

Order: 400
Text: Second Opinion
Value: second_opinion

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

Type: Date/Time
Cat Item: Appointment Requests
Mandatory: True
Order: 600

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Question: Preferred Appointment Time
Name: preferred_apt_time

Type: Date/Time
Cat Item: Appointment Requests
Mandatory: True
Order: 700
Question: Secondary Preferred Appointment Time:
Name: sec_preferred_apt_time
Default Value: <blank>

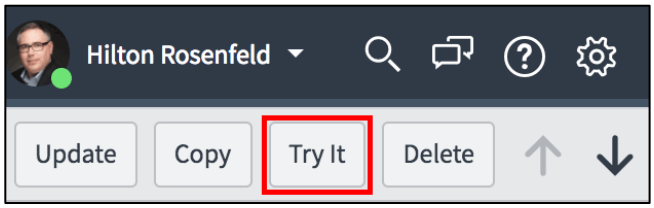
Type: Container End
Cat Item: Appointment Requests
Order: 800

Type: Single Line Text
Cat Item: Appointment Requests
Mandatory: True
Order: 900
Question: Preferred Veterinarian's Name
Name: vets_name

10. Click **Update**.

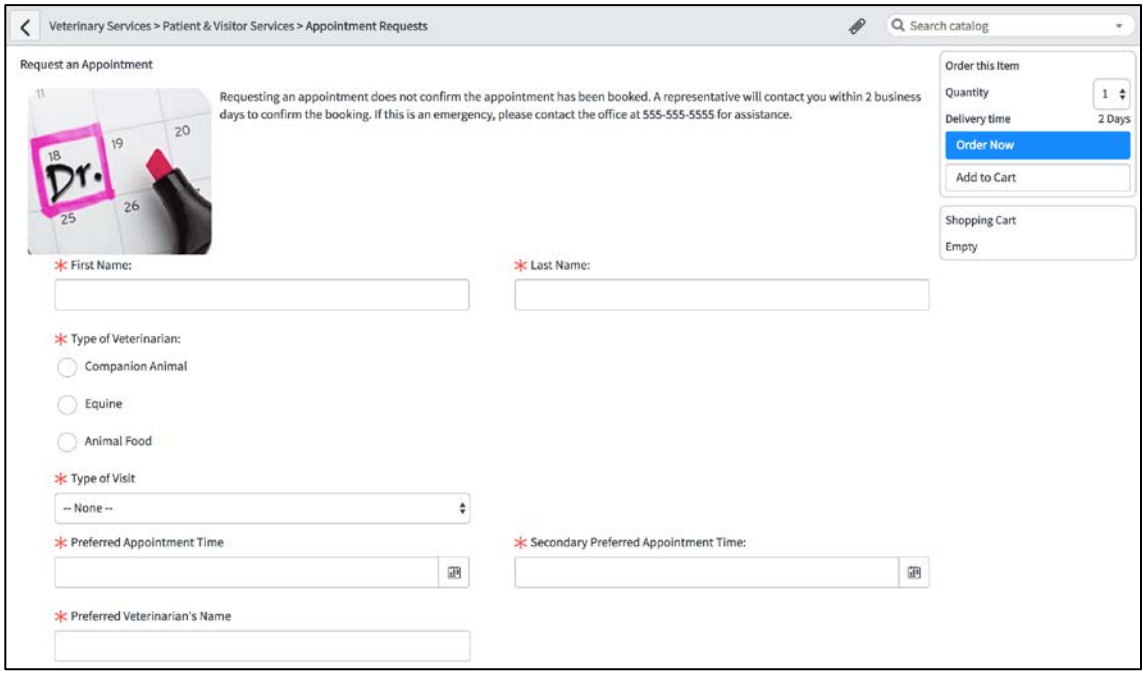
Lab Verification

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.



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4. Verify that the **Appointment Requests** catalog looks like the example.



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Lab Goal

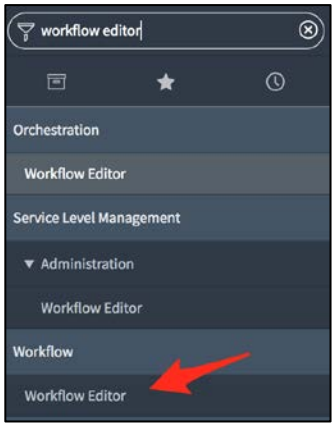
Lab 1.4 Create a Workflow

This lab explains how to create a new workflow to automate the task creation of a newly created request item. Subject areas include the following:

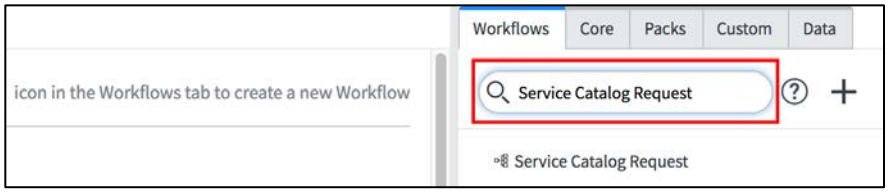
- Copy a workflow
- Edit a workflow
- Publish a workflow
- Attach the workflow to a request item

Copy a Workflow

1. Navigate to **Workflow > Workflow Editor**

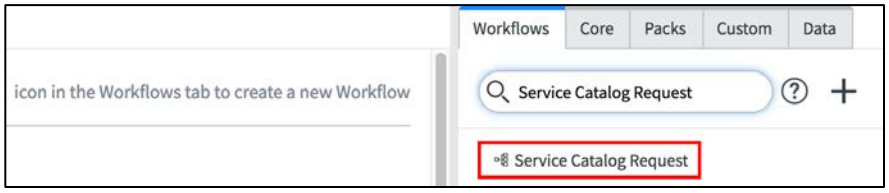


2. Search for the **Service Catalog Request** workflow using the **Filter Workflows** search bar.

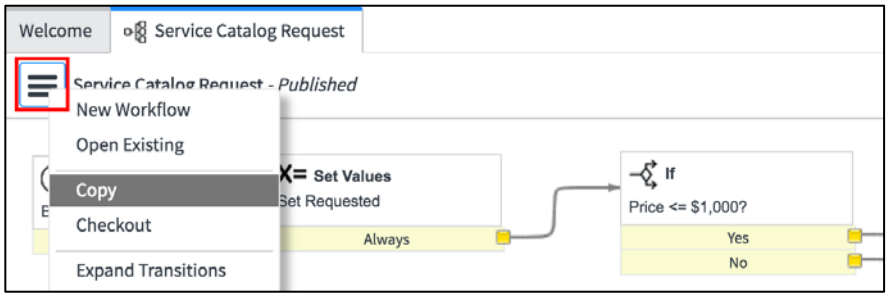


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3. Click **Service Catalog Request** to open the workflow.



4. Click the **Workflow Actions** icon in the upper-left corner and click **Copy**.

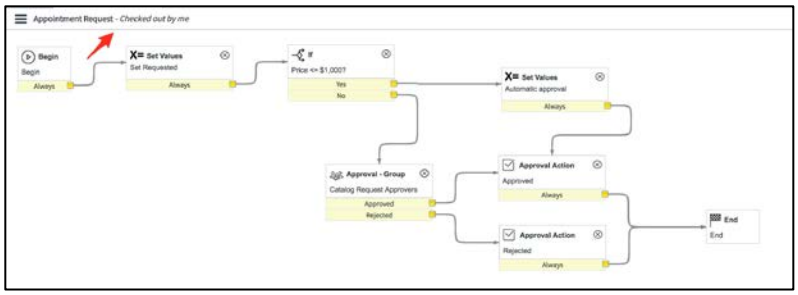


5. Name the workflow **Appointment Request** and click **OK**.



Edit a Workflow

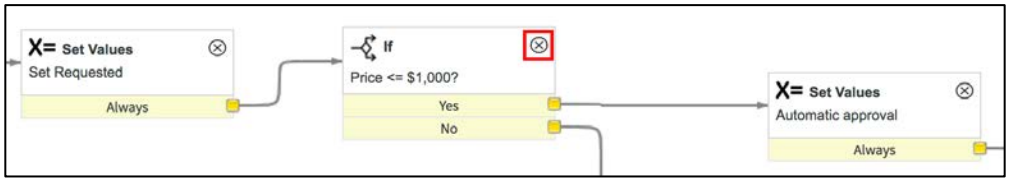
1. Assure the open workflow is now **Appointment Request** and the state is **Checked out by me**.



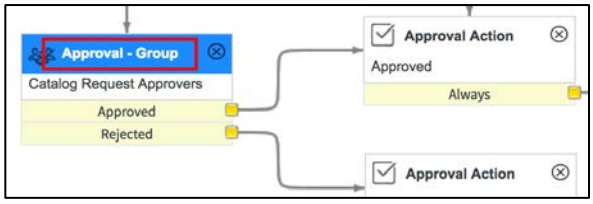
2. Review the workflow start to finish, double-clicking on each box to access the details.

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3. Remove the **If statement** from the workflow by clicking the **X** in the box.



4. Open the **Approval Group** activity box by double-clicking on the header.

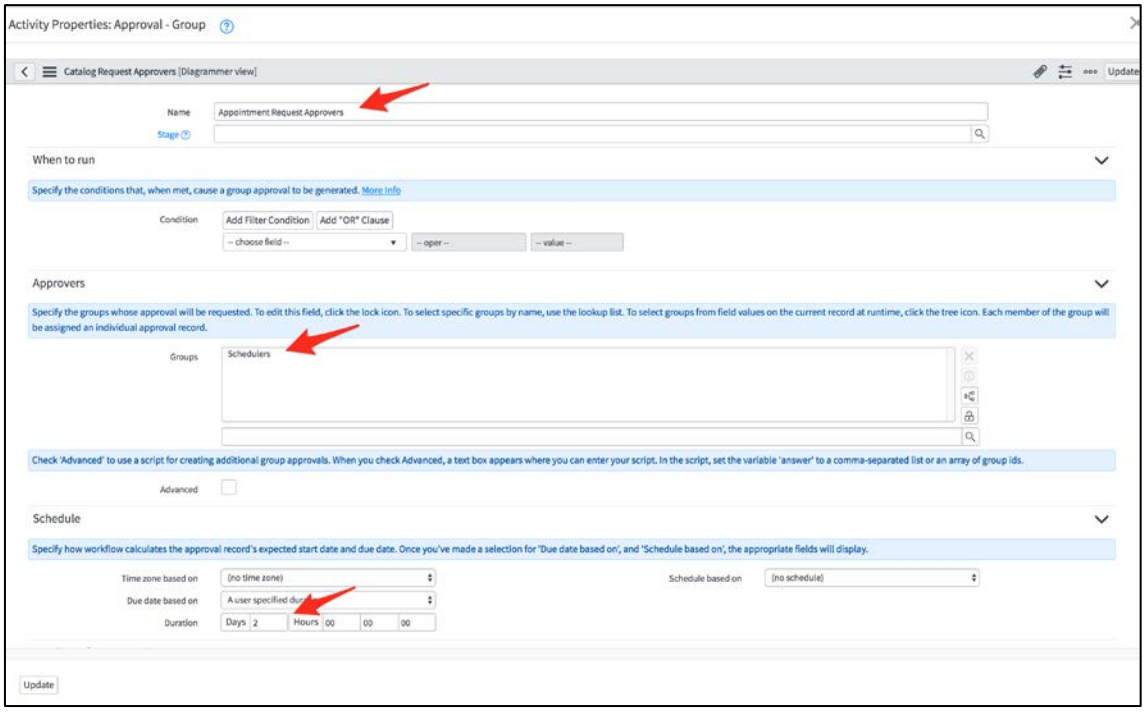


5. Set the **Approval Group** activity to reflect the following:

Name: Appointment Request Approvers
Groups: **Click** the **lock** icon to unlock the setting for groups**.**
Remove Catalog Request Approvers by highlighting the name and clicking **X**
Add Schedulers using the search bar

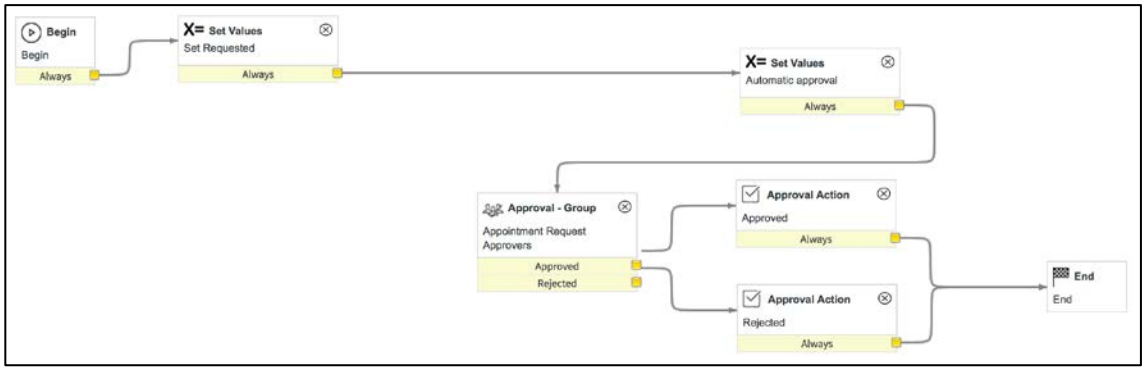
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Duration: 2 days



6. Click **Update**.

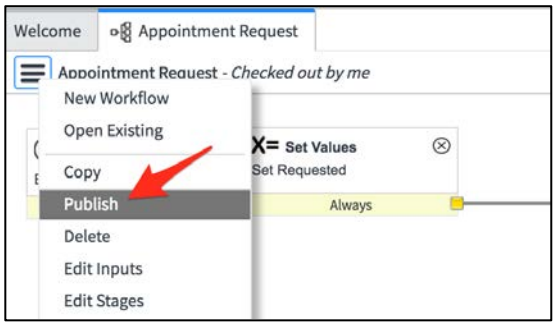
7. Verify the workflow action paths matches the example below.



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Publish a Workflow

1. Click the icon for the Workflow Actions and click Publish Workflow.



Attach Workflow to Catalog Item

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

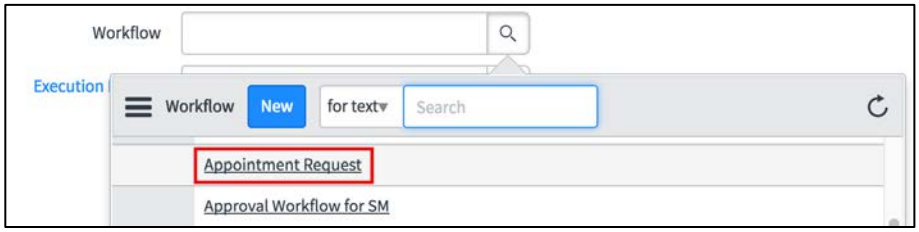
2. Click the **Appointment Requests** catalog item.



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



4. After the pop-up appears, click the **Appointment Request** workflow.



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

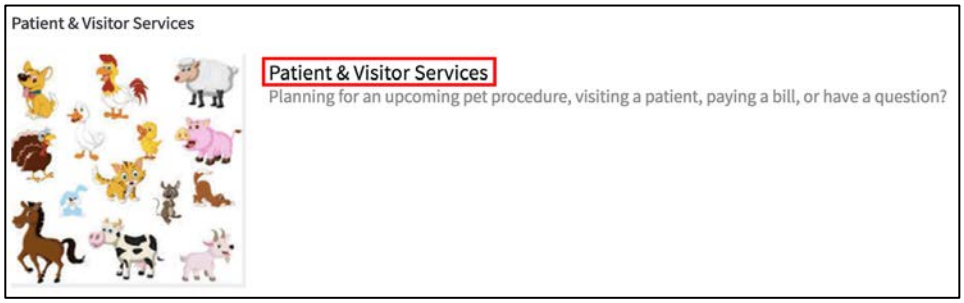
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Lab Verification

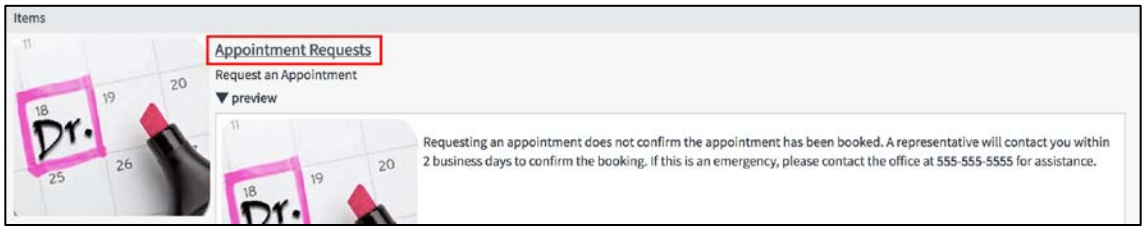
1. Navigate to **Service Catalog > Catalogs**.
2. Click the **Veterinary Services** catalog.



3. Click **Patient & Visitor Services**.



4. Click **Appointment Requests**.



5. Fill in the mandatory information.
6. Click the **Order Now** button to submit the request.

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7. Click the **Request Number** to view the requested item.



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



9. Confirm that the running workflow is **Appointment Request**.

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Lab Goal

Lab 1.5 Fulfilling the Request

This lab explains how to fulfill the tasks associated to the request recently submitted. Subject areas include the following:

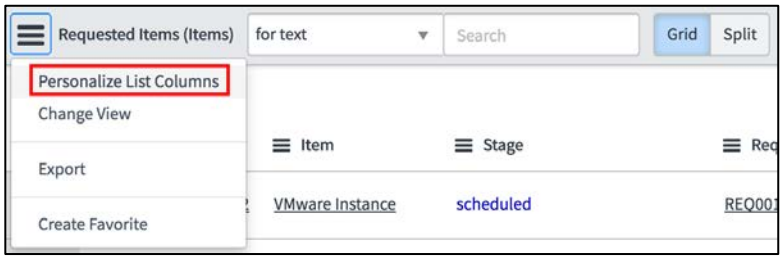
- Locating the tasks generated
- Marking the tasks complete

Log on to the Training Instance

1. Navigate to the unique instance URL provided.
2. Log in with the provided **itil** credentials.

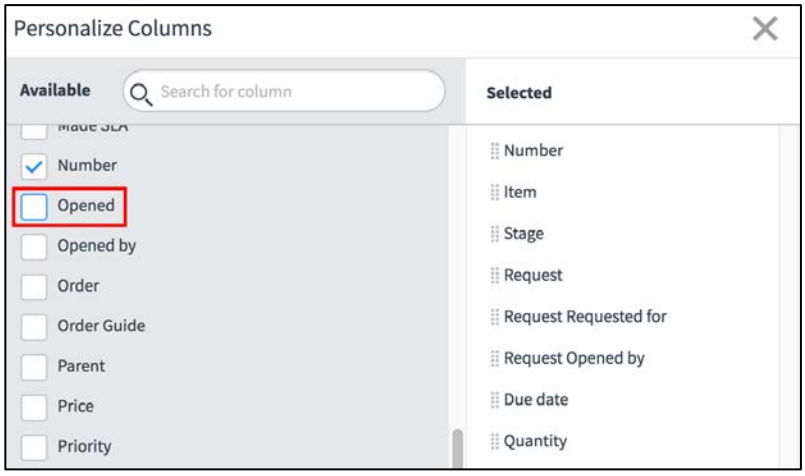
Complete the Task

1. Navigate to **Service Catalog > Open Records > Items**.
2. Click on the **menu** and select Personalize List Columns.



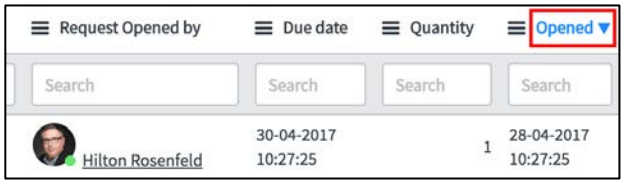
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3. Add the **Opened** date to the columns view.



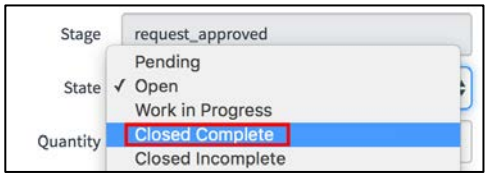
4. Click **OK**.

5. Sort by the **Opened** date to find the tasks generated most recently.



6. Click the **Item Number** tied to the request submitted most recently to open the task.

7. Change the status state from **Open** to **Closed Complete**.



8. Click **Update**.

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Lab Goal

Lab 1.6
Check System Notifications

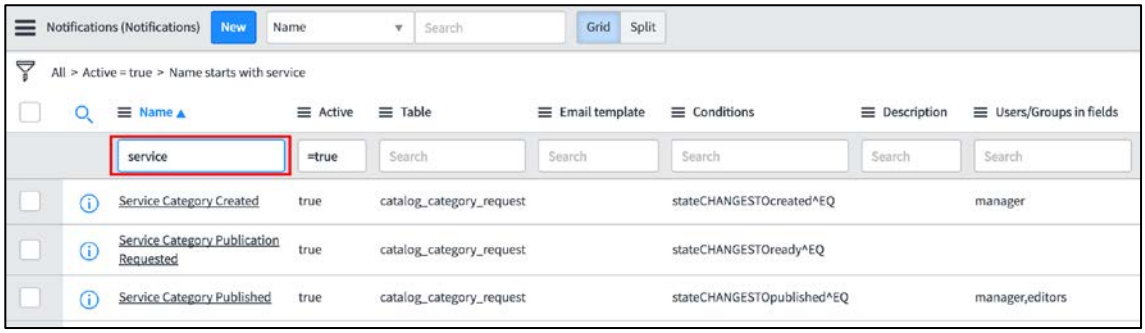
This lab explains the notifications in the system. The purpose is to be aware of and familiar with the notifications generated by the system.

Log on to the Training Instance

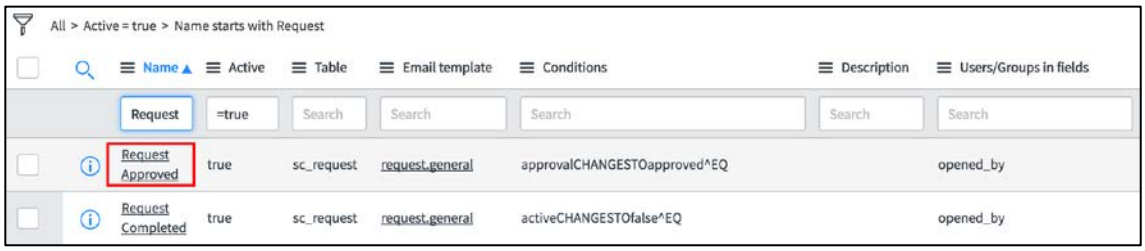
1. Navigate to the unique instance URL provided.
2. Log in with the provided administrator credentials.

Check Notifications

1. Navigate to **Email > Notifications**.
2. Perform a search by Name is **Service**.

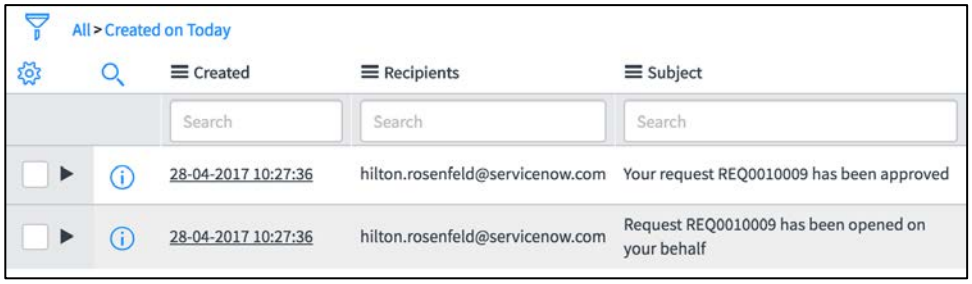


3. Review the list of notifications tied to the name Service.
4. Perform a search by Name is **Request**.
5. Open the **Request Approved** notification and review its contents.



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6. Navigate to **System Logs > Emails** and review any emails.



7. If there are no notifications listed, the system is not configured to send emails.

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Lab Goal

Lab 1.7 Audit Reports

This lab explains how to pull reports for request items that are audited. Learning how to create, run, and export the reports saves Service Managers and the Auditing team valuable time. Subject areas include the following:

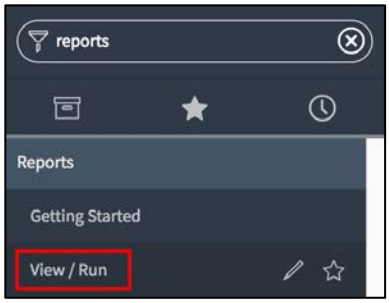
- Creating reports from existing reports
- Creating reports from scratch
- Scheduling reports
- Creating dashboards

Log on to the Training Instance

1. Navigate to the unique instance URL provided.
2. Log in with the provided administrator credentials.

Create Reports from Existing Reports

1. Navigate to **Reports > View / Run**.



2. Perform a search for **Approval** with **All** reports as the search base.

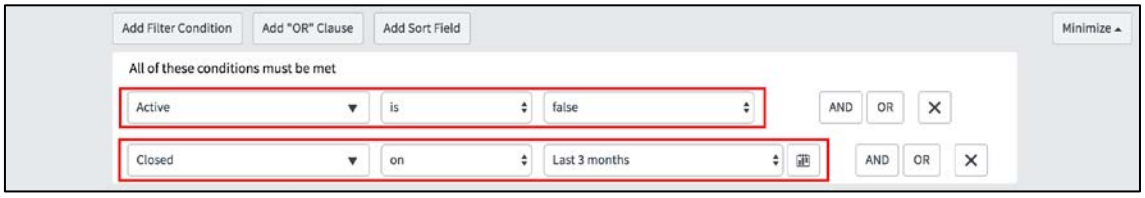


3. Review the list of reports available with **Approval** in the name.
4. Click **Active Request by Approval State** to view the report.

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5. Update the report to reflect the following conditions:

   Active is **False**
   AND
   Closed > on > Last 3 Months



6. Change the name to **Resolved Requests by Quarter**.

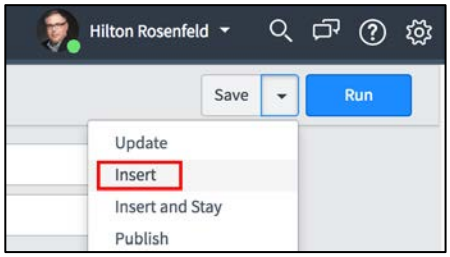


7. Add **Requested For** to the **Stacked by** field.



8. Click **Run** to ensure the report will generate results.

9. Click the down **caret** next to **Save** and click **Insert**.



10. Perform a search for **Approval** with **All** reports as the search base.

11. Ensure the original report **Active Request by Approval State** remains on the list.

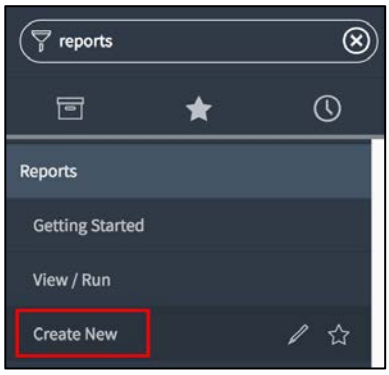
12. Perform a search for **Resolved Requests** with **All** reports as the search base.

13. Ensure the new report **Resolved Requests by Quarter** is on the list.

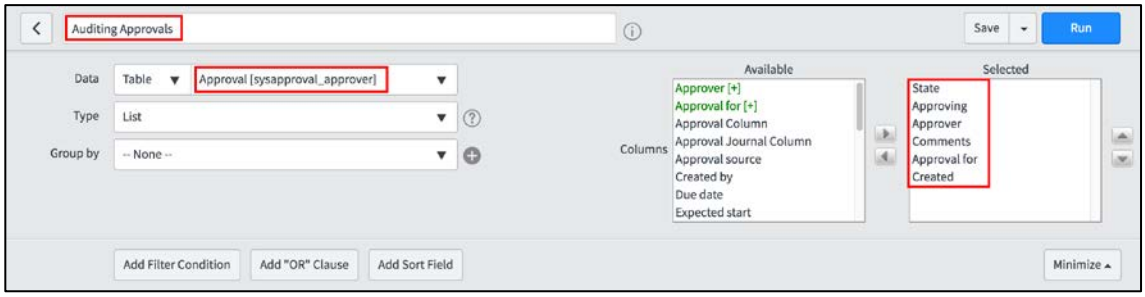
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Create Reports from Scratch

1. Navigate to Reports > Create New.



2. Fill out the information as shown in the example below.



Report Title: Auditing Approvals
Table: Approval [sysapproval_approver]
Selected: State, Approving, Approver, Comments, Approval for, Created

3. Click **Save**.

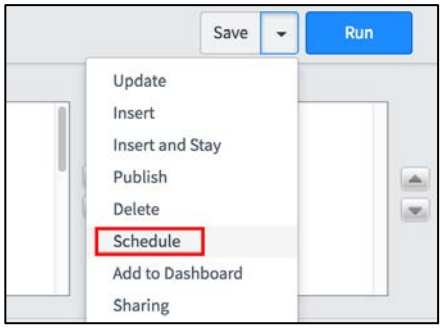
Scheduling Reports

1. Navigate to **Reports > View / Run**.

2. Search **Auditing Approvals** and open the report.

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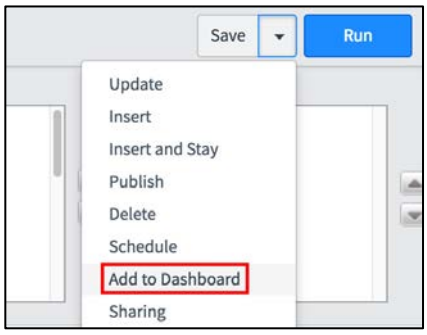
3. Click the **down caret** next to **Save** and click **Schedule**.



4. Take note of the options when scheduling a report.

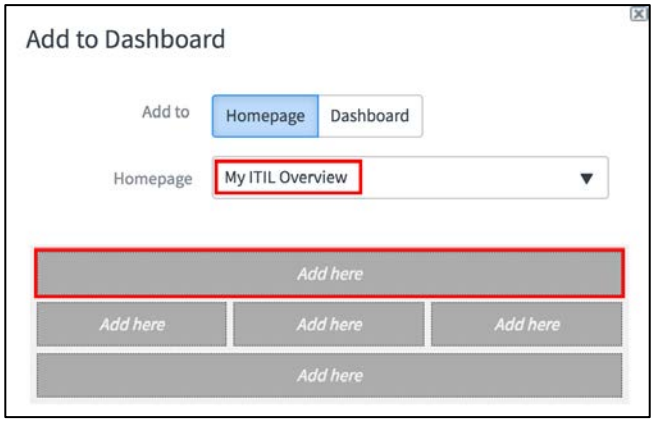
Creating Dashboards

1. Navigate to **Reports > View / Run**.
2. Search **Auditing Approvals** and open the report.
3. Update the fields to reflect the example below.
4. Click **Save**.
5. Click the **down caret** next to Save and click **Add to Dashboard**.



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6. Select **ITIL Overview** from the list and click **Add Here**.



7. Validate on the **ITIL Overview** that the report is present.

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