



# SERVICE CATALOG

& SERVICE PORTAL



# OVERVIEW

- Service Portal
- Service Catalog
- Service Catalog Design
- Service Catalog & Request Management
- Order Guides
- Record Producers
- Catalog Builder

# SERVICE PORTAL

- The Service Portal allows you to build a mobile-friendly self-service portal experience for both employees and customers
- It is a feature that is active by default and interacts with parts of the platform so users can access platform features through portals
- It provides a modular user interface framework for quick and easy building of application portals and dashboards for the platform

# SERVICE CATALOG

- The Service Catalog is a robust ordering system for services and products offered by various departments for users
- The Service Catalog lets users see a list of things they might need (such as IT products and services)
- Categories define the organization of catalog items into logical groups
  - Categories can have parent-child relationships such as IT and laptop
- Users with admin or catalog\_admin role can manage multiple service catalogs
- Multiple service catalogs can be used to provide services to different teams within an organization
- Catalog items can be shared by multiple catalogs

# SERVICE CATALOG DESIGN

- We have a number of different objects that play a part in the design of a service catalog
  - Catalog Items are the building blocks of the service catalog and may include hardware, software, or services
  - Variables provide questions to help the requestor specify what item, option, or service to order
  - Variable Sets are a collection of variables that can be shared between catalog items
  - Flows run behind the scenes to communicate the stages of approval process and drive request fulfillment
  - Record Producers are a form that produces a task record and are considered a type of Catalog Item

# ITEMS, REQUESTS, & TASKS

- When an item is 'ordered', a request is created, and each request can have one or more items associated with it
  - Request numbers are generated to keep track of an order and begin with the 'REQ' prefix [sc\_request]
- Each requested item in an order is given a specific 'Requested Item Number' aka RITM
  - Requested items begin with the 'RITM' prefix [sc\_req\_item]
- Each requested item may have one or more tasks associated with them that are necessary to prepare the item for delivery to the user
  - Requested item tasks begin with the 'SCTASK' prefix [sc\_task]

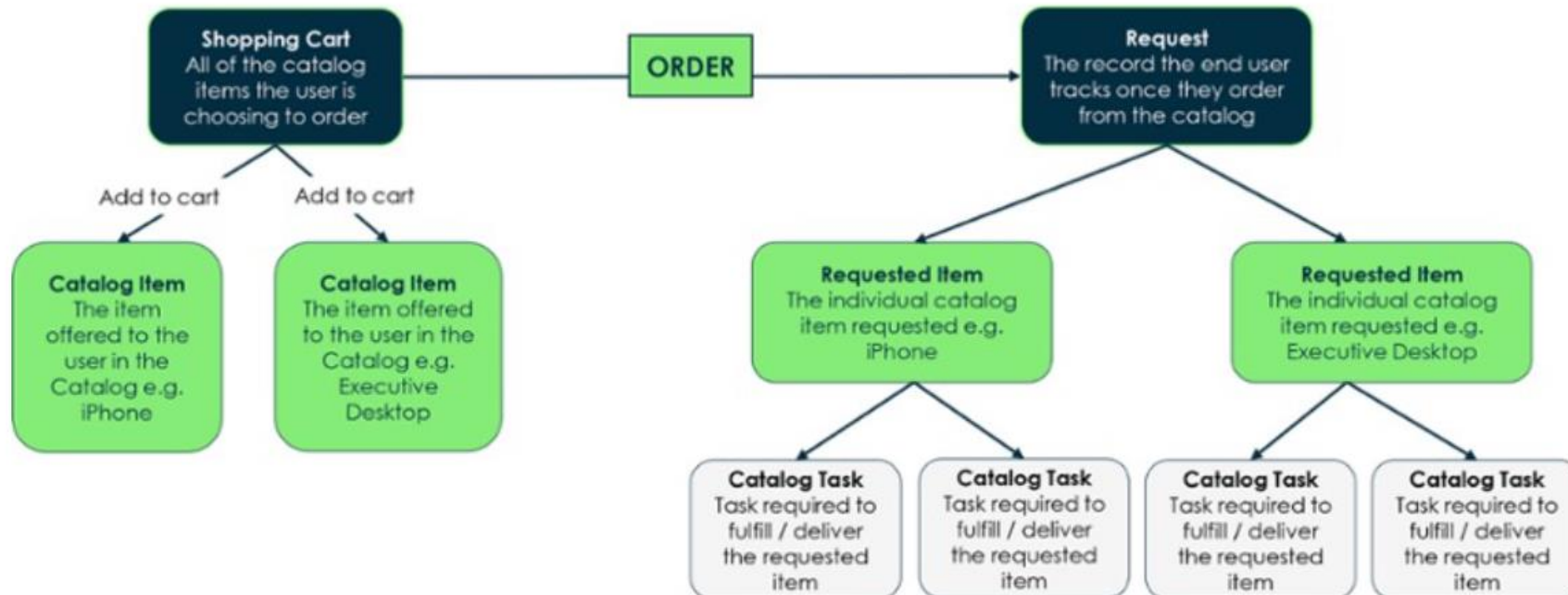
# SERVICE CATALOG & REQUEST MANAGEMENT

## Service Catalog

The user browses the catalog for items they wish to order or request

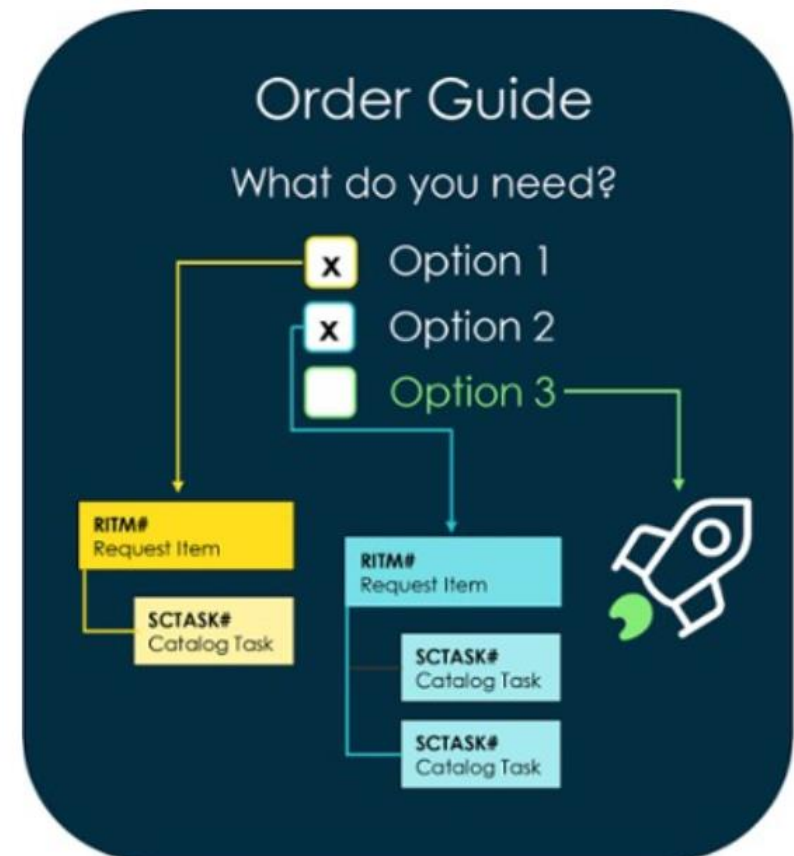
## Request management

Once the order has been placed, the request needs to be tracked and fulfilled



# ORDER GUIDES

- Order guides assist customers in ordering a complete set of necessary items and help users see item relationships
- Questions can be used to present item options to users with only relevant questions and choices at the appropriate time in the ordering process
- Order guides add the ability to order multiple, related items as one request





# RECORD PRODUCERS

- A Record Producer is a specific type of catalog item that provide a better user experience instead of using the regular task-based form for creating task-based records
- Record producers look like simplified forms
- They allow users to provide information that is translated into task-based records being added or modified in the database
- Record producers should be used to create task-based records **ONLY**
  - DO NOT create requested item records from record producers

# CATALOG BUILDER

- The catalog builder is a tool that lets us easily create or edit a catalog item or record producer using a visual and guided experience
- Users can also create a template that can be used to create catalog items
  - When creating a template, we can specify values or restrictions for items created using the template
- Note: the catalog builder is designed to support common and simple use cases for business users. There are some limitations to the catalog builder and overcoming these limitations can be done using the classic view

# VIRTUAL AGENT

- Virtual Agent is a conversational platform that helps users obtain information, make decisions, and perform common work tasks within a messaging interface
- This can include information from stored knowledge bases, the service catalog, and more!
- This is our AI agent that can help resolve routine issues faster than interacting with a human representative
- Users do still have the option to switch to a human agent for assistance at any time

# SERVICE CATALOG DEMO

- Let's see the Service Portal and tour the service catalog!

# TERMINOLOGY

- Service Catalog - a robust ordering system for services and products offered by various departments for users
- Catalog Item - the building blocks of the service catalog and may include hardware, software, or services
- Variable - provide questions to help the requestor specify what item, option, or service to order
- Variable Set - a collection of variables that can be shared between catalog items
- Record Producer - a specific type of catalog item that provide a better user experience instead of using the regular task-based form for creating task-based records
- Order Guide - assist customers in ordering a complete set of necessary items and help users see item relationships
- Catalog Task – tasks needed to complete the delivery of each request item from start to finish
- Virtual Agent - a conversational platform that helps users obtain information, make decisions, and perform common work tasks within a messaging interface