



# INTACT TECHNOLOGY

**HP Service Manager**

**Service Request Catalog (SRC)**

**Tips & Tricks Document**

*(note: in process of updating to support v 9.32)*

The HP Service Request Catalog (SRC) is a more robust and user-friendly version of the end user interface. SRC utilizes the same license as Employee Self Service (ESS, ess.do). SRC is designed around ITIL v3 best practices for a robust end user catalog. The product is intuitive, easy to use and provides a more enhanced user experience.

Users can either submit:

- Support Request (break/fix),
- Service Request (order from catalog, if licensed)
- Access Help Files for documentation and instructions on how to use the system
- Access Self-Service Knowledge Articles (if licensed)

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## High level questions around ESS vs. SRC:

**Q1:** Previously there was a Save Cart for Later and Save Cart as a Template - are those still available in SRC?

**A1:** "Save Cart for Later" functionality is still in SRC but has been improved. You can add items in the cart and then log out and login again and your cart will still show those items. There is no exclusive option to save your cart, it's automatically saved for later.

"Save Cart as Template" functionality is not available in SRC.

**Q2:** The old ESS could be tailored to use Interaction or Incident templates for support tickets - is this still possible?

**A2:** Templates functionality is not available in SRC. It has been replaced or is being handled by creating individual support requests that can be selected.

**Q3:** If a user does not have approval rights, will they still see the Approval dashboard?

**A3:** Yes. The approval dashboard can be configured to be shown or hidden, but not conditionally so it would be a hide or show for all users.

**Q4:** Can messages or marquees be published to the SRC?

**A4:** No. Messages and marquees do not currently work with SRC.

**Q5:** Can the data that is exposed in the Assistance box be filtered by profile?

**A5:** No. Access to help content cannot be filtered by profile. However, the link to the Help information can be removed.

**Q6:** Can Affected Service and Urgency be hidden on the submit screen in SRC?

**A6:** Yes. This is handled in the "Configure Checkout Panel" section in the Service Manager client. It can be found under the "Tailoring" menu.

**Q7:** Can the confirm Approval screen be bypassed?

**A7:** No. There is no way to bypass the confirm Approval screen.

**Q8:** Can the Cost field be hidden if we do not utilize them?

**A8:** Yes.

**Q9:** Can Components on the Dashboard be hidden?

**A9:** Yes. You can hide components on the Dashboard, however not by role or profile.

**Q10:** Can Services Be Grouped by their Status on the Dashboard?

**A10:** No. This cannot be accomplished in SRC.

**Q11:** What can be configured / tailored on the Dashboard Landing Page?

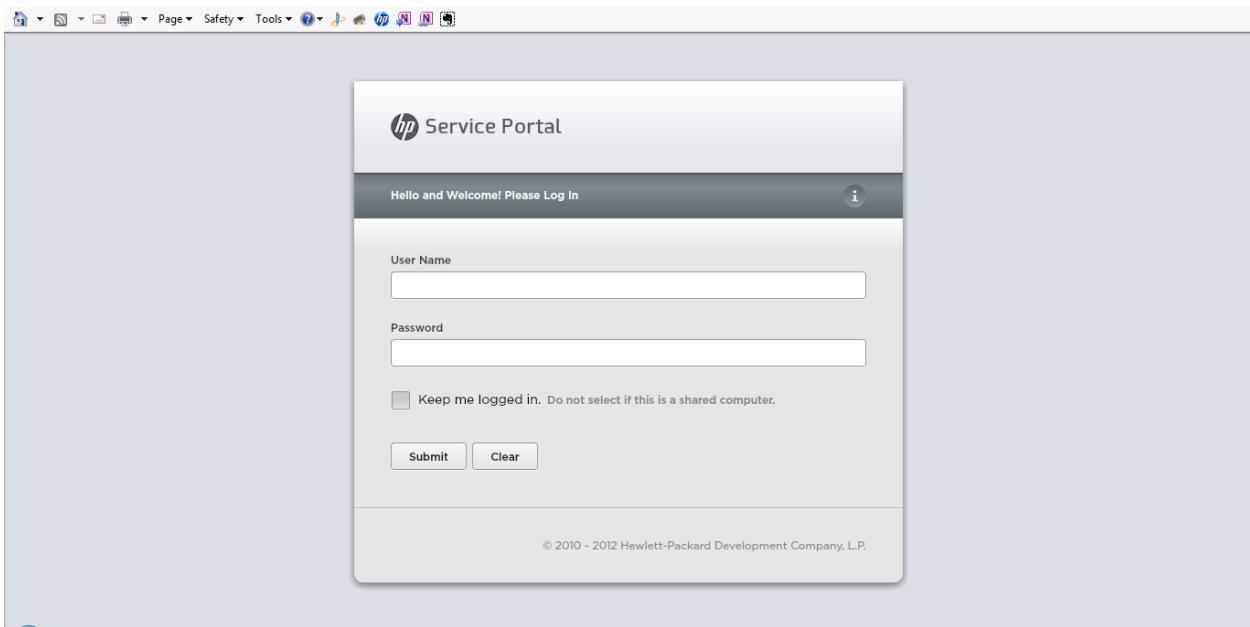
**A11:** The Widgets (Approvals, Requests, Subscriptions, Assistance, etc.) on the landing pages of each tab (Dashboard, Subscriptions, Services and Support) can be

configured to hide or show the widgets. In addition, customization of the links on each widget and ability to change the text and set the order in which they appear on the landing page can be accomplished.

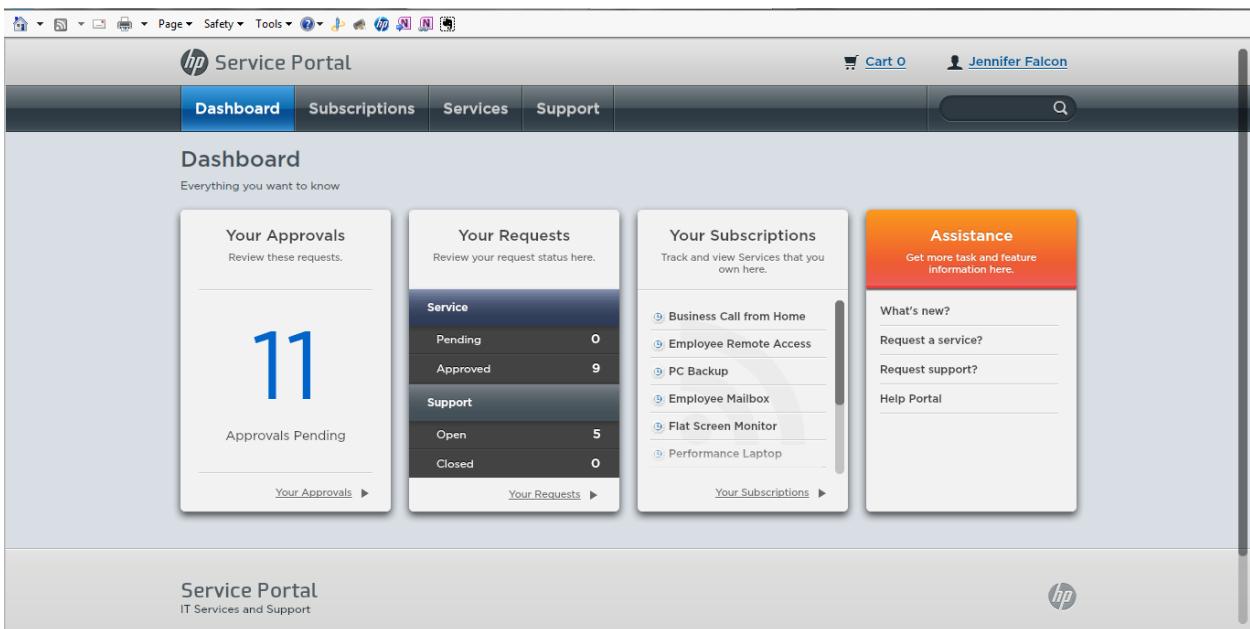
**Q12: Can the SRC application be branded?**

**A12:** Yes. The SRC login and application screens can be configured to add a customer logo and branded name for the application. Please refer to HP SRC Customization Guide.

## SRC Out of the Box Login / Dashboard Screens:

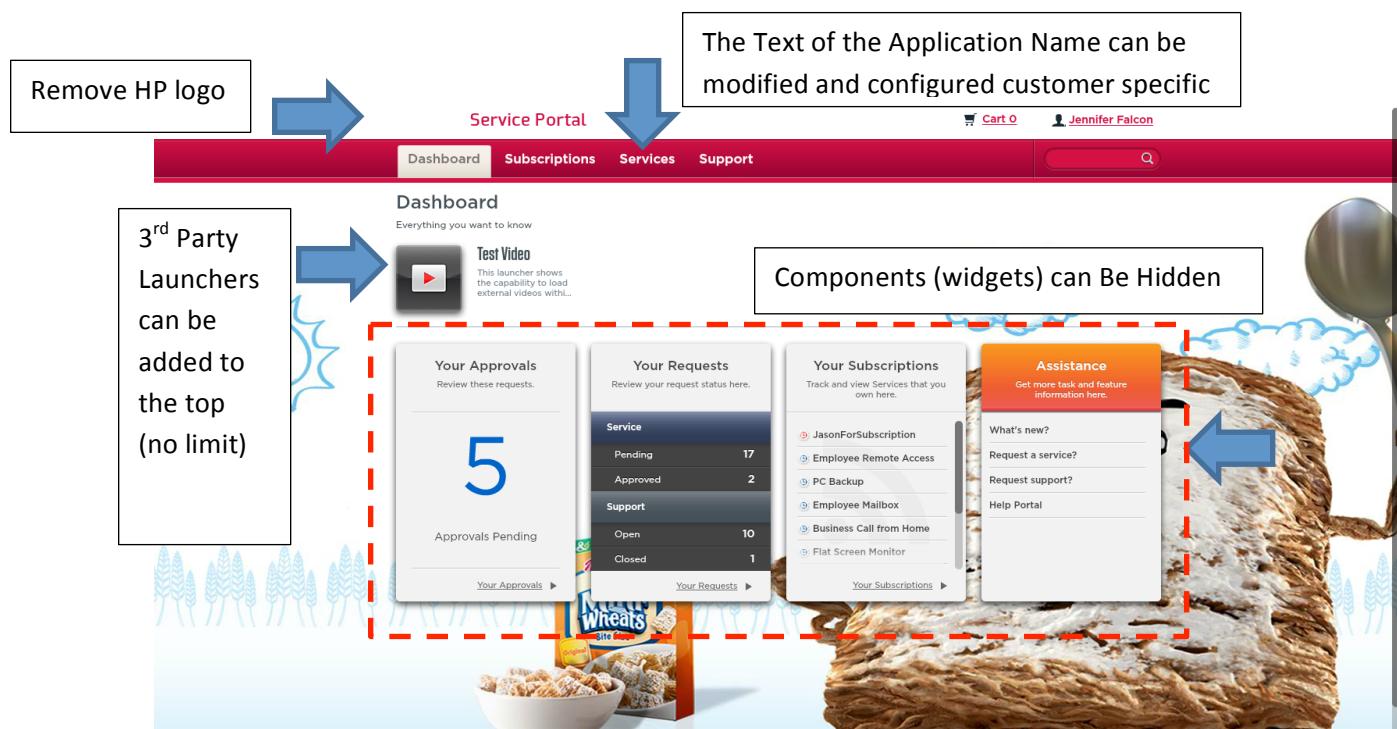


The screenshot shows the HP Service Portal login screen. At the top, there is a navigation bar with icons for Home, Print, Copy, Page, Safety, Tools, and various system status indicators. Below the navigation bar is the title "hp Service Portal". A dark grey header bar contains the text "Hello and Welcome! Please Log In" and an information icon. The main form area has fields for "User Name" and "Password", both with placeholder text. There is also a checked checkbox for "Keep me logged in. Do not select if this is a shared computer." and two buttons for "Submit" and "Clear". At the bottom of the form, a copyright notice reads "© 2010 - 2012 Hewlett-Packard Development Company, L.P."



The screenshot shows the HP Service Portal dashboard. The top navigation bar includes the "hp Service Portal" logo, a user profile for "Jennifer Falcon", a shopping cart icon with "Cart 0", and a search bar. Below the navigation is a dark grey header with tabs for "Dashboard", "Subscriptions", "Services", and "Support". The main content area is titled "Dashboard" and features four cards: "Your Approvals" (11 pending approvals), "Your Requests" (table showing Pending: 0, Approved: 9, Open: 5, Closed: 0), "Your Subscriptions" (list of items like Business Call from Home, Employee Remote Access, etc.), and "Assistance" (orange card with links for What's new?, Request a service?, Request support?, and Help Portal). At the bottom, a footer bar displays "Service Portal IT Services and Support" and the "hp" logo.

## Sample of Branded Login and Main Dashboard Screens:



## SRC Main Landing Page

The screenshot shows the Service Request Catalog (SRC) main landing page. At the top, there's a navigation bar with links like 'Page', 'Safety', 'Tools', and a search bar. A user profile for 'Jennifer Falcon' is visible. Below the header, there are four main sections:

- Your Approvals:** Shows 9 approvals pending.
- Your Requests:** Shows 9 pending requests.
- Your Subscriptions:** Shows a list of services: Business Call from Home, Employee Remote Access, PC Backup, Employee Mailbox, Flat Screen Monitor, and Performance Laptop.
- Assistance:** A red box containing links for 'What's new?', 'Request a service?', 'Request support?', and 'Help Portal'.

Callouts highlight specific features:

- A large orange speech bubble points to the 'Your Approvals' section with the text: "Visual Indicator of Requests pending your Approval – Simply Click to access list".
- An orange box points to the 'Your Requests' section with the text: "List of Services You are Subscribed To".
- An orange box points to the number '9' in the 'Approvals Pending' section with the text: "Count of Your Service and Support Tickets".
- An orange box points to the 'Assistance' section with the text: "Access to the Help Server Contents".

## Assistance:

Assistance allows for users to access Help Contents. This can be turned on or off, but cannot be done so conditionally.

The screenshot shows the 'Service Request Catalog' page. The left sidebar contains a navigation tree with categories like 'Welcome to Service Request Catalog', 'Frequently Asked Questions', 'Basic Concepts', 'Typical Tasks', 'Accessing your Account', 'Approval Tasks', 'Attachments', 'Viewing Your Request Status', 'Service Catalog Tasks', 'Request a Bundle', 'Subscription Tasks', 'Support Catalog Tasks', 'System Administration and Configuration', 'Using Search', 'Using the Shopping Cart', and 'Legal Notices'. The main content area is titled 'Requesting Service Items' and contains a list of how-to articles:

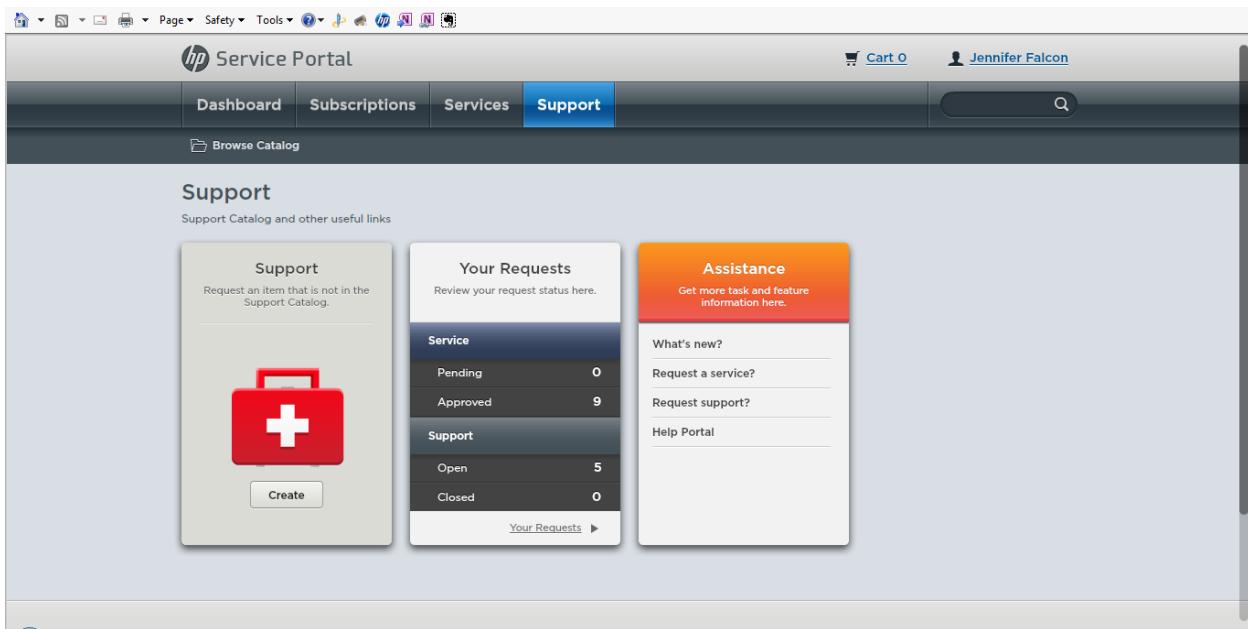
- How Do I Request a Service?
- How Do I Request for Another Person?
- How Do I Save Items?
- How Do I Resubmit a Request?
- How Do I Close a Service Catalog Request?

At the bottom of the page, there's a copyright notice: '© 2010-2012 Hewlett-Packard Development Company, L.P.' and a link to 'Send documentation feedback to HP'.

The screenshot shows a web browser window for the HP Service Request Catalog. The title bar reads "hp Service Request Catalog". The left sidebar contains a navigation menu with links like "Welcome to Service Request Catalog", "Frequently Asked Questions", "Basic Concepts", "Typical Tasks", "Accessing your Account", "Approval Tasks", "Attachments", "Viewing Your Request Status", "Service Catalog Tasks", "Subscription Tasks", "Support Catalog Tasks", "Requesting Support Items", "Modifying Support Requests", "System Administration and Configuration", "Using Search", "Using the Shopping Cart", and "Legal Notices". Below this is a "Contents" link. The main content area has a section titled "Requesting Support Items" with sub-sections for "How Do I Request Support From the Catalog?", "How Do I Create a Custom Support Request?", "How Do I Update a Support Request?", and "Related Topics". A copyright notice at the bottom states "© 2010-2012 Hewlett-Packard Development Company, L.P." and a link to "Send documentation feedback to HP".

# Support Requests

Support requests are a way for end-users to report an issue to the Service Desk.



The screenshot shows the hp Service Portal interface. At the top, there's a navigation bar with links for Dashboard, Subscriptions, Services, and Support. The Support tab is currently selected. Below the navigation is a search bar and a user profile for Jennifer Falcon. The main content area is titled "Support" and includes a "Support Catalog and other useful links". It features three main sections: "Support" (with a red kit icon), "Your Requests" (listing pending, approved, support, open, and closed requests), and "Assistance" (with a link to the Help Portal). A "What's new?" section lists pending and approved requests.

To create a support request, you can click on the Create button to submit an ad hoc request or you can click on Browse Catalog to find defined list of support requests available.

## Ad hoc Support Request:



When you click the Create button you will be presented with the Open a Support request screen. The screen is split into 4 primary sections; ***Request Description, Contact Information, Additional Information and Attachments.***

The screenshot shows a web-based application interface for submitting a request. At the top, there's a navigation bar with icons for file operations like 'Page', 'Safety', and 'Tools'. Below the navigation is a 'Request Description' section with fields for 'Request Name' and 'Request Description', both of which have a required field indicator (blue exclamation mark). A large blue arrow points from the left towards this section. To the right of the main form is a sidebar titled 'Request Support' with the sub-instruction 'Let us help!' and a 'Submit' button. Below the main form, three additional sections are listed: 'Contact Information', 'Additional Information', and 'Attachments', each with a note indicating they depend on previous task results. Three smaller blue arrows point from the left towards these three sections.

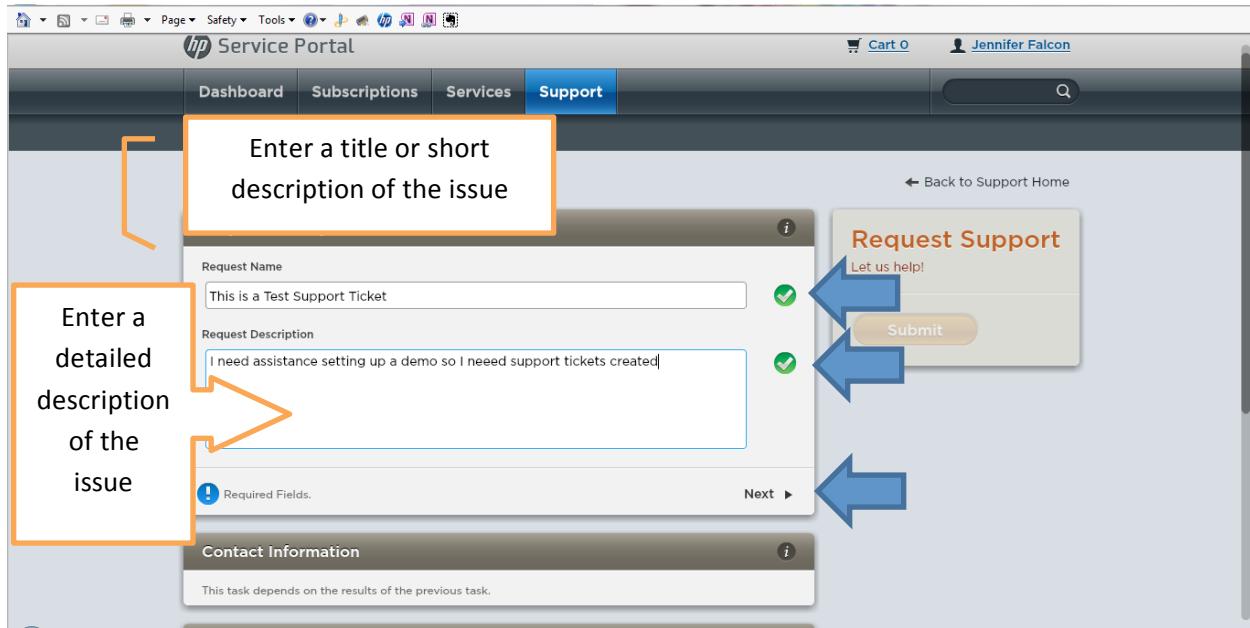
Any data in designated fields marked Required will need to be filled in prior to being able to Submit. The system will not display the Submit button as active until all required fields have been populated. The system visible denotes required fields in several ways.

"Submit" button remains inactive until all required fields have been populated

You can also click on the Help on Field icon on any form to receive tips on how to proceed.

**Tip**  
Complete all required fields. If the check marks are green, click Next.

When all field in the section required to proceed have been populated, the system will visibly display a ✓ Click the Next button to go to the next section.



When the section is completed it will be displayed as Green. The system will open the next dialogue box that requires interaction.

## CONTACT

The next section is related to the Contact. The system automatically defaults the contact to the current logged on user. You can modify the contact if you are reporting for someone else.

**Note:** In order for the ability to request on behalf of someone, a change needs to be made to the ApplicationContext.properties file. Out-of-box, this feature is turned off. Change the following item to show as true. "src.requestedFor.editable=true". This will allow users to click the magnifying glass.

**Request Description**

This is a Test Support Ticket, I need assistance setting up a demo so I need support tickets cr...

**Contact Information**

Request For: FALCON, JENNIFER

Contact for the Request: FALCON, JENNIFER

Contact Method:

- E-mail
- Telephone
- None

**Additional Information**

This task depends on the results of the previous task.

Submit

To modify the contact information, remove the user in the field and click the Magnifying glass icon to search for a contact. To increase the chances of finding a match and reducing the query time, the system requires that you enter a minimum of 2 letters in order to search for contacts.

**Contact Search**

First Name

Last Name

Contact Name

Type at least two characters in a field to find a match.

Search tips

**Tip**

If you cannot find a match, try typing the name in uppercase characters, or capitalize the first letter of each name. Click the Magnifying Glass icon in any field to browse the list of all contacts.

As in the previous section, when the Contact section is completed, the section will turn green and activate the next section, Additional Information.

**Note:** the Affected Service and Urgency can be hidden and not required independently or the entire Additional Information section can be hidden based on requirements. This is done in the Modify Checkout Panels section in the Service Manager client (Tailoring menu).

A screenshot of a web browser displaying the 'Service Request Catalog' page. The page shows a form for creating a support ticket. A large blue arrow points from the left towards the 'Additional Information' section. This section is enclosed in a dashed orange border. Inside the border, there are fields for 'Affected Services' (a dropdown menu labeled 'Select one') and 'Urgency' (another dropdown menu labeled 'Select one'). Below these fields is a note: 'Required Fields.' followed by a blue exclamation mark icon. To the right of the 'Additional Information' section is a callout box containing the text: 'These fields or the entire section can be hidden based on requirements.' At the top of the page, there is a 'Request Description' box with some sample text and an 'Edit' link. Below it is a 'Contact Information' box with contact details and an 'Edit' link. On the right side, there is a 'Request Support' box with a 'Submit' button. The browser's address bar shows the URL: http://vswin191.intact.tech:8080/src140/secure/main.jsp?JSESSIONID=...

The final section for the Ad Hoc request is the Attachments section. This can be hidden based on requirements. It is recommended that the attachment size is limited in size and specifically should match any attachment limits already enforced in the HPSM application. Adding an attachment is as simple as browsing and selecting the file to attach.

The screenshot shows the 'Request Support' page in the HPSM application. The 'Attachments' section is highlighted with a dashed orange border. A callout box points to this section with the text: 'This entire section can be hidden based on requirements. Limits should be placed on max.size'. Below the screenshot is a file selection dialog titled 'Select file to upload by vswin191.intact.tech'. The dialog shows the file path 'Look in: Documents' and lists several folder entries under 'My Documents (131)'. A blue arrow points from the callout box to the 'Select file to upload' button in the dialog.

Request Description

This is a Test Support Ticket, I need assistance setting up a demo so I need support tickets cr... [Edit](#)

Contact Information

FALCON, JENNIFER, FALCON, JENNIFER, E-mail [Edit](#)

Additional Information

Low [Edit](#)

Attachments

Attach a File [Next >](#)

Request Support

Let us help! [Submit](#)

This entire section can be hidden based on requirements. Limits should be placed on max.size

Select file to upload by vswin191.intact.tech

Look in: Documents

Recent Places

- Desktop
- Libraries
- Computer
- Network

Name

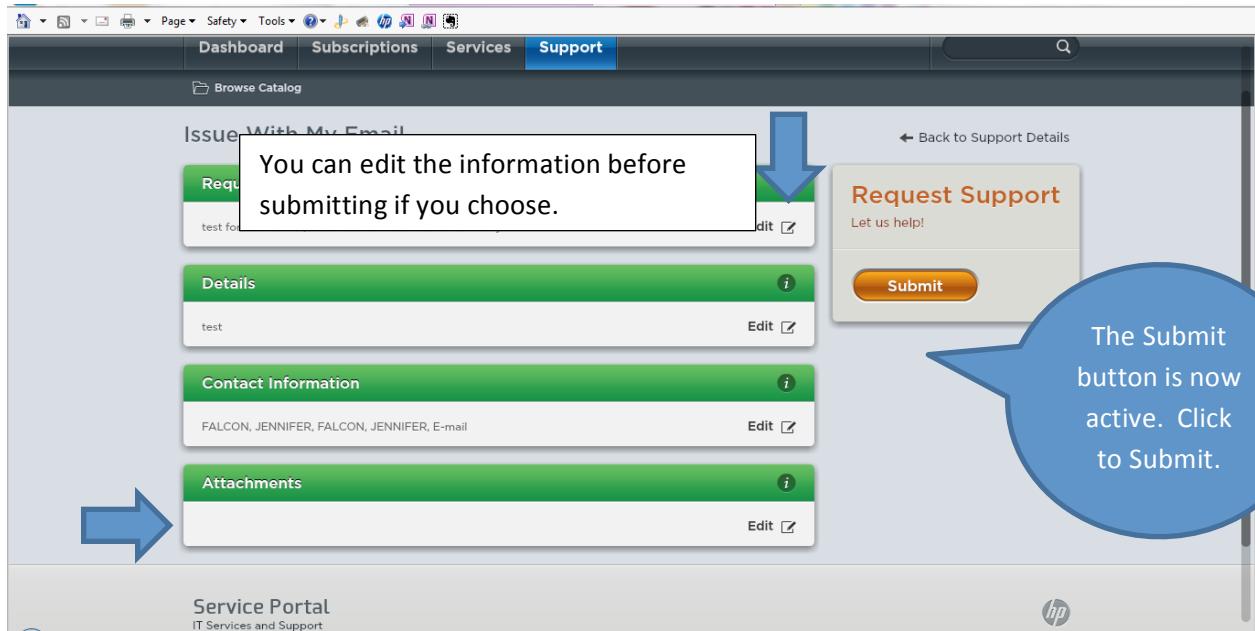
My Documents (131)

- 2012 Project Closeouts
- Adobe
- APOLLO GROUP
- BG Group
- BJs
- BMC Surround PreSales
- BOEING
- Business Value Assessments
- COX
- Desktop\_120113
- DHS CDM

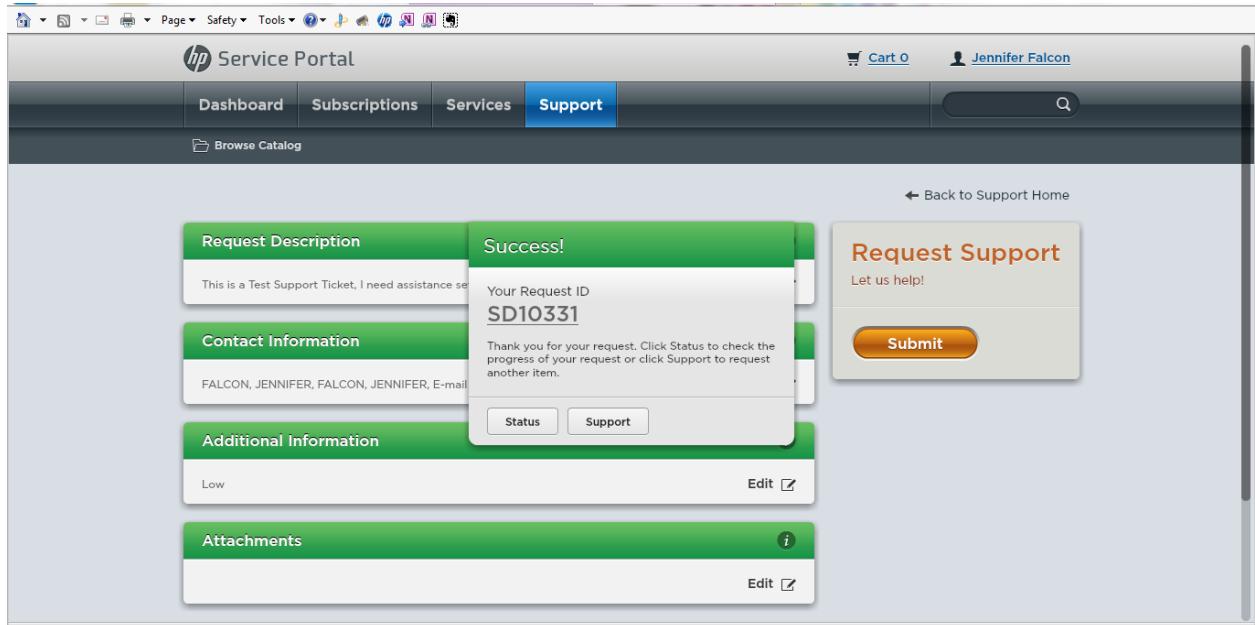
File name:

Files of type: All Files (\*.\*) [Open](#) [Cancel](#)

After adding the attachment, click the Next button. All Sections will then be Green and the Submit button is activated.



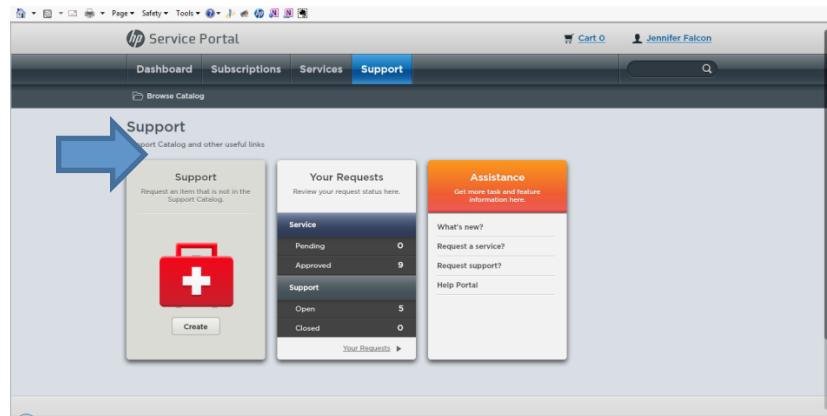
After submitting, you will receive a confirmation with the assigned ticket number.



## Submitting a Pre-Defined Support Request

SRC allows the ability to define support requests in advance to drive data capture, data consistency and reduce time. SRC has many out of box support requests already defined, but modifications and additions to those lists can be configured based on requirements. To submit a pre-defined support request, simply click on the Browse Support Catalog option from the Support Dashboard.

Pre-defined support requests that appear in the Support Catalog in essence are what SRC uses instead of Templates as in HPSM. They provide greater flexibility and usability to guide end user and can be more effective than templates.



The Support Catalog is a hierarchy structure to make it easy to categorize and find using the menu. You can also use the search option if you know any part of the request name.

A screenshot of the HP Service Portal Support Dashboard. The 'Support' tab is active. On the left, there's a 'Hide Catalog' button and a list of high-level categories: Applications, Facilities, Hardware, and Security. An orange callout box with an arrow points to this list, containing the text: 'A list of high level categories is displayed'. On the right, there's a search bar and a message bubble stating: 'You can bypass the menu and search for a single request'. Below the categories, there's a summary card for 'Your Requests' showing 6 open and 0 closed items.

Below is an example of the defined list of Support requests under the Applications category.

Similar to the Ad Hoc Request – Tips are available to assist the user

**Tip**  
This is a list of Support Catalog items in the category you selected. Click any item to learn more about that support item. Click **Request** to provide order information.

To initiate a support request, click on one of the pre-defined requests in the list. We will be displaying 2 different types so that you can see how each service request is configured to require different information to guide the user in data capture.

#### **Example #1: Email Issue:**

The same four (4) sections are required but the details section is configured specifically for this request.

Issue With My Email

**Request Description**  
test email issue, email issue

**Details**  
System Name: [empty]

**Contact Information**  
This task depends on the results of the previous task.

**Attachments**  
This task depends on the results of the previous task.

System name is now a new required field for this type of request

#### **Example #2: Report Air Conditioning Problem:**

Notice the description is configured to reflect the request type

**Support Details**

If you feel like the air conditioning is running too hot or too cold in your area, use this form to report the problem.

**When you complete the request, add the following information**

- Request Description**  
Describe what you need to solve your problem.
- Details**  
Add any information related to options.
- Contact Information**  
Tell us the best way to contact you.
- Attachments**  
Attach any related documents or specifications.

**Request Support**

Let us help!

**Request**

The same four (4) sections are required but the details section is configured specifically for this request.

**Request Description**

hotter than heck in here, no air flow

**Details**

Location

Required Fields.

**Contact Information**

This task depends on the results of the previous task.

**Attachments**

**Request Support**

Let us help!

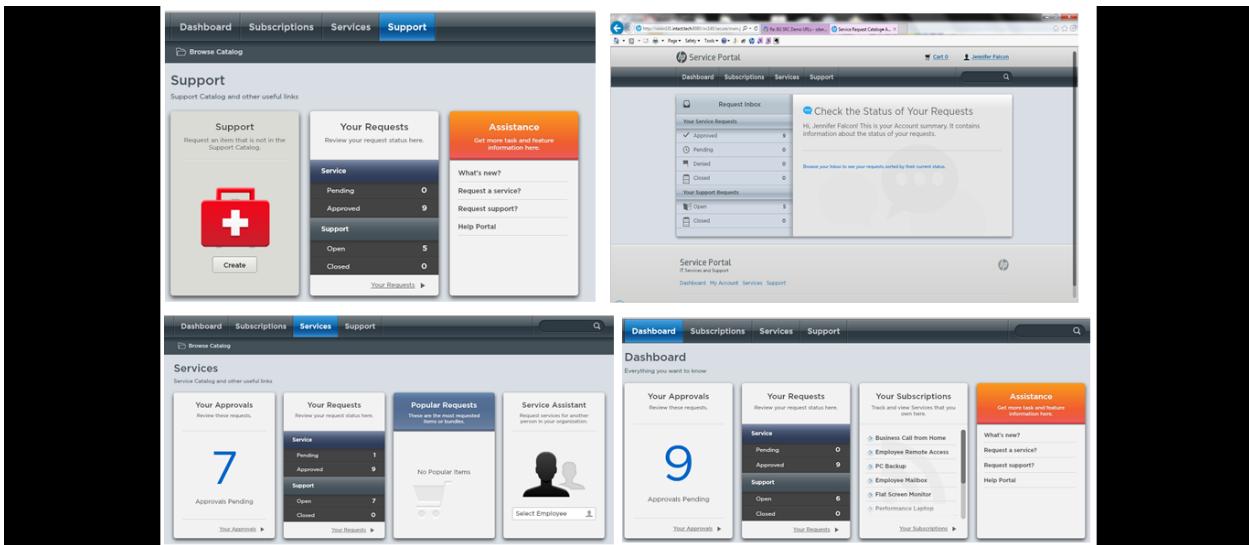
**Submit**

Location is now a new required field for this type of request

The remaining steps are the same as the Ad Hoc type to complete and submit the Support Request.

## View Ticket Status or Update a Support Ticket

You can access your list of support tickets from the Main Dashboard, Services Dashboard, Support Dashboard or by clicking on the Inbox icon. You will always be able to see the full list of requests.



Clicking on the Open Support Tickets from any of these dashboards provide the following summary of tickets for the user.

This screenshot shows the "Request Inbox" view in the HP Service Portal. The inbox is titled "Open (5)" and lists five support requests:

	Request ID	Request Name	Action
✓ Approved	SD10330	Curtis Hampton	▶
⌚ Pending	SD10328	Curtis Hampton	▶
☒ Denied	SD10327	Curtis Hampton	▶
✉ Closed	SD10319	this should be title	▶
✉ Open	SD10318	Phone is not working.	▶

At the bottom of the inbox, it says "1 - 5". The overall page header includes the "hp Service Portal" logo, a search bar, and a user profile for "Jennifer Falcon".

When selecting one of the tickets in the list, this is the view that the user sees for their Support Request ticket and they can further interact as noted below.

**Users can add updates or Close the ticket at any time.**

**Displays ticket details.**

To add feedback, type your feedback and click Post.

**Any updates the user posts will be shown in the Activity Logs. In addition, Incident updates can be posted but only if the Visible to User check box is physically marked on the Incident in HPSM. System Default in HPSM is unchecked.**

## Submit a New Services Request:

Services Requests are those requests for goods and services that are available through a customer facing catalog. This function is the “Order from Catalog” or Service Catalog that existing HPSM users are familiar with. These are typically pre-defined Service Requests that have the data capture, approvals and fulfillment workflows built to maximize efficiency. Ad hoc type requests should not be utilized for fulfillment. They should only be utilized as a means to notify the Service Catalog Owner that no request was found. Additional configuration and process discussions should be conducted to discuss how to handle undefined requests.

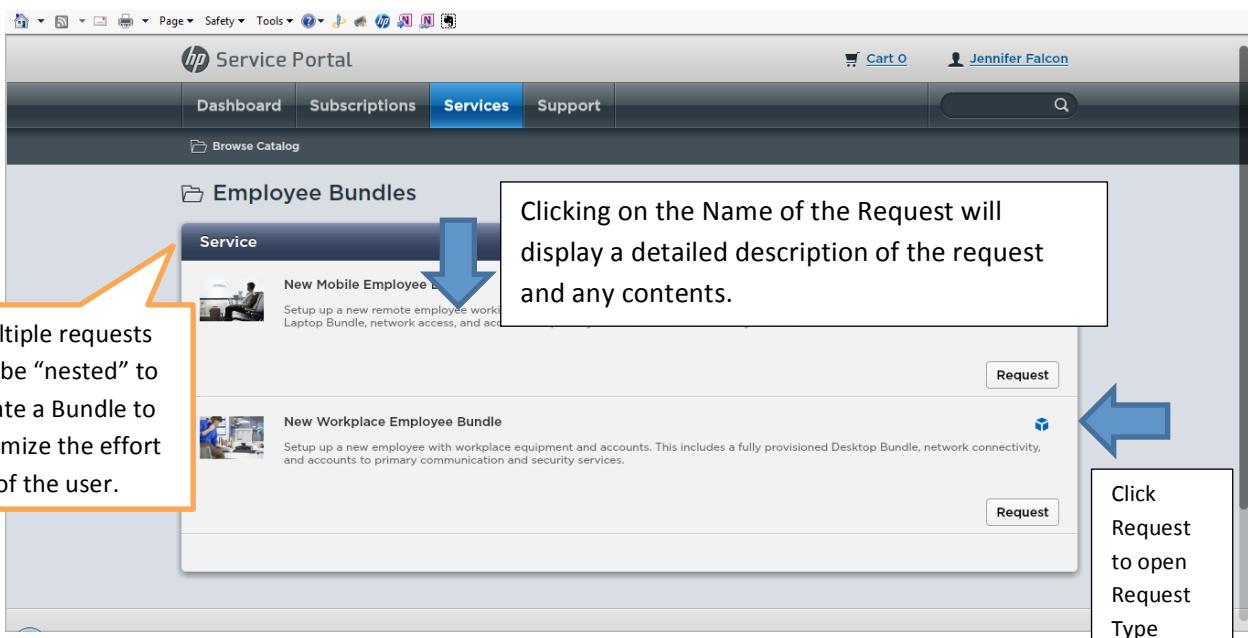
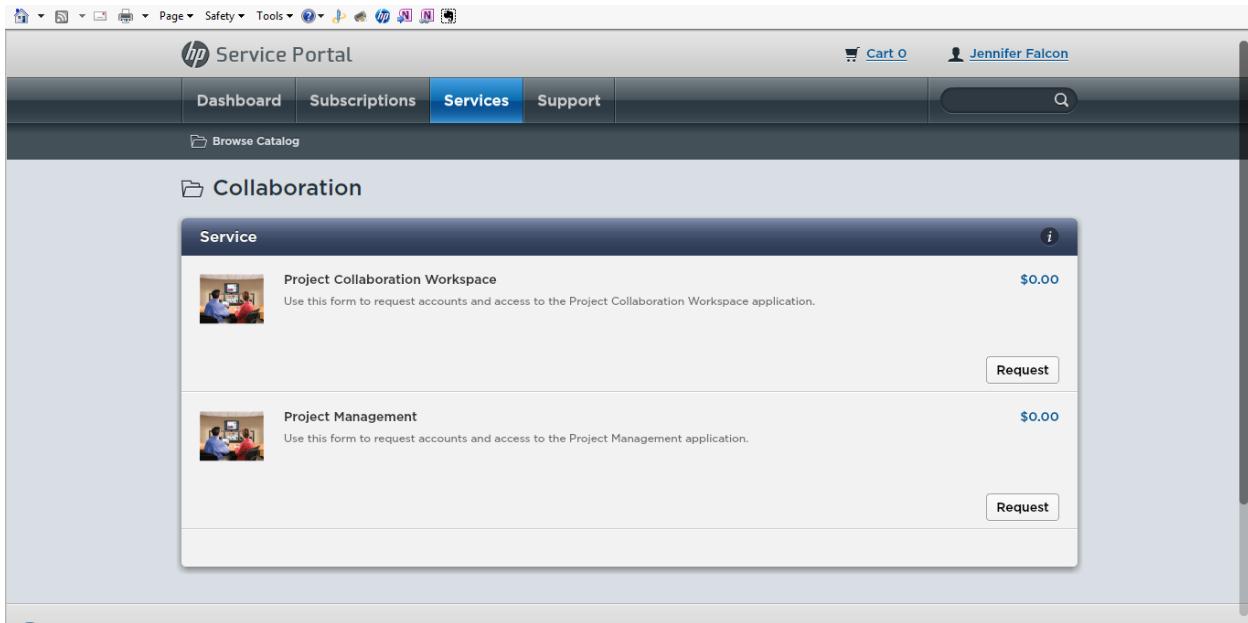


## Browse the Services Catalog:

The Services Catalog is a hierarchy structure to make it easy to categorize and find using the menu. You can also use the search option if you know any part of the request name.

A screenshot of the hp Service Portal interface. At the top, there's a navigation bar with links for Dashboard, Subscriptions, Services (which is highlighted in blue), and Support. To the right of the navigation is a user profile for Jennifer Falcon and a search bar. Below the navigation is a hierarchical menu titled "Business and Department Services" which branches into Application Access, Employee Lifecycle Services, Personal Productivity Services, and Technical and Support Services. To the right of this menu are sections for Application Support, Professional and Consulting, Collaboration, Finance and Accounting, HR, and Sales. At the bottom of the page, there are several cards: "Approvals Pending" (with 6 Open and 0 Closed requests), "Your Requests" (with 6 Open and 0 Closed requests), "HPSM Access For Developers" (with four dots indicating more items), and a "Select Employee" dropdown. A large orange callout box on the left points to the hierarchical menu with the text "A list of high level categories is displayed". Another orange callout box on the right points to the search bar with the text "You can bypass the menu and search for a single request. Type ahead search supported."

The category structure can have multiple levels, however a good rule of thumb for design is 3 clicks whenever possible. Below are a couple of screenshots of the Service Requests that are single items for Collaboration and for a bundled request for a New Mobile Employee.



Bundles are requests that have multiple items that have been nested into a Single Request for ease of use. The individual service requests can be standalone requests on their own, but can also be put into a Bundled package so that we can streamline the request process for the end user.

Selecting a bundle allows the user to only make 1 selection instead of selecting each individual components separately. This is especially helpful for New Employee/Contractor onboarding requests where multiple services requests are known and identified as being needed as part of the higher bundled service.

Clicking on the Name of the Request will display the detailed contents of the Bundle.



Clicking on Request button will open the Service Request. As with Support Requests, each Service Request is configured to capture information specifically required in order to fulfill the request. Additional options can also be added. In the example below, the New Mobile Employee Bundle is configured with an Option to request a Flat Screen Monitor.

**Note:** Costs can be configured to \$0 but the label cannot be hidden.

Options can be configured as Radio Buttons, Pick Lists or Drop Downs fields

Similar to other SRC screens  
– Tips are available to assist the user

**Add to Cart** –  
allows for  
editing and to  
continue  
Shopping.  
**Request Now**  
will proceed  
to Checkout

### Using the Shopping Cart:

As so many of today's online shopping sites such as Amazon, Dell, etc., the SRC utilizes a shopping cart system. Users can add and remove items to their cart and either continue shopping or submit the cart to "checkout". Items remain in the Cart until submitted or the contents of the Cart are emptied/removed.

Jennifer Falcon's  
Shopping Cart

Items in Your Cart

New Mobile Employee Bundle

View cart   Submit cart   Continue Shopping

Total Items: 1

Submit Cart

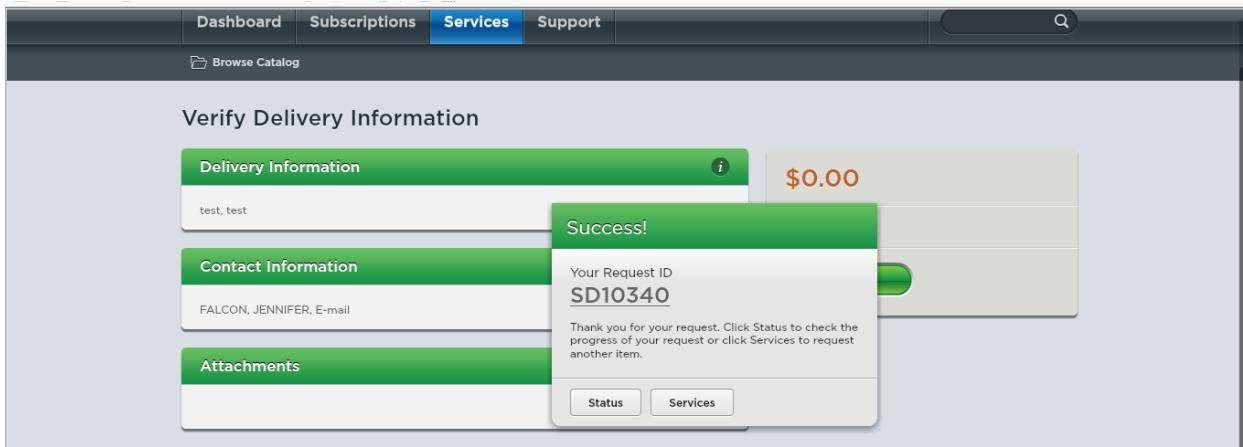
Submit Cart will bring you to the final checkout screen to verify any delivery information configured.

The screenshot shows a web-based application interface for 'Verify Delivery Information'. At the top, there's a navigation bar with links like 'Page', 'Safety', 'Tools', and 'Browse Catalog'. Below the navigation is a title 'Verify Delivery Information'. The main content area has three sections: 'Delivery Information', 'Contact Information', and 'Attachments'. The 'Delivery Information' section contains fields for 'Request Name' and 'Request Description', both of which have red asterisk icons indicating they are required. A blue arrow points to the 'Request Name' field. To the right of these sections is a summary box showing '\$0.00' and 'Total Items: 1'. A green 'Submit' button is located below the summary. A blue arrow also points to the 'Submit' button.

As with all request types in SRC, the Submit button will not be Active until all required fields and information have been populated.

This screenshot shows the same 'Verify Delivery Information' page after fields have been populated. The 'Delivery Information' section now contains the values 'test, test' and has a green background. The 'Contact Information' section contains the value 'FALCON, JENNIFER, E-mail' and also has a green background. The 'Attachments' section is empty and has a grey background. A large blue arrow points from the left towards the 'Delivery Information' section. Another blue arrow points from the bottom towards the 'Submit' button, which is now green and active.

When all required fields have been populated, each section will turn Green and the Submit button is now active. Click Submit to receive the confirmation and ticket number.



### Using Search instead of Menus:

The screenshot shows the hp Service Portal Services page. The top navigation bar is identical to the previous screenshot, with tabs for Dashboard, Subscriptions, Services (highlighted in blue), and Support. The search bar is visible, and the user 'Jennifer Falcon' is logged in. The main content area is titled 'Services' and includes sections for 'Your Approvals', 'Your Requests', 'Popular Requests', and 'Service Assistant'. A callout box with an orange border and an orange arrow points to the search bar. Inside the callout box, the text reads: 'Starting in v9.32, type-ahead functionality is supported'.

Category	Status	Count
Service	Pending	0
	Approved	9
Support	Open	6
	Closed	0
	Total	6

The system will return a list of Service Requests that match your criteria. The search option is normally preferred because it reduces the time to find the request but it is based on user preference. Both will ultimately produce the same end result.

**hp Service Portal**

Cart 1 Jennifer Falcon

Search Results

Mobile Employee

Catalog

- Service
- Support

Item Type

- All
- Individual It...
- Bundles

Service - 23 Results (Total)

New Mobile Employee Bundle

Setup up a new remote employee working from home with mobile equipment and remote access accounts. This includes a fully provisioned Laptop Bundle, network access, and account...

See all Employee Bundles category items Request

Mobile Phone \$0.00

Wireless services are particularly useful for employees who don't have a designated company office or home office, who travel more than 50% of the time, or who provide off-hours su...

See all Mobile Communication Devices category items Request

Mobile Phone Service

Provide phone service account for new or existing mobile device.

More Support

No answer to your support question? Create a support request.

Request

Support

No similar items found. Please refine your search.

### Approvals:

Approvals can be configured at 3 different levels within HPSM to accommodate from the very simplest to the more complex workflows necessary to automate the end to end (E2E) Service Request process through Request Fulfillment. HPSM allows for approvals to be done at the Service Request (or Interaction) Level, the Request Management Quote Level and the Request Management Line Item Level. The levels and how the approvals are configured will be determined on the requirements defined for each Service Request.

Typically the Service Request level is a standard “Right to Request” Line Manager type approval and normally is a 1 to 1 or individual; Quote approvals are “Right to Have” Business Owner approvals; and the Line Item approvals, if required, are Application approvals centered around specific levels of access or privileges. Both Quote and Line Item approvals are recommended to be done at a group level. This allows for any member of a group to satisfy the approval to eliminate the risk of a request spending a long time pending approval. Additionally, you can configure standard or low level requests to have no approvals if deemed appropriate.

Regardless of where the approvals are configured, the approvals can be done via the SRC interface without having to have full HPSM web or client access.

**Note:** Approvers see all requests pending their approval in SRC, including Change Requests as well.

The screenshot shows the hp Service Portal interface. At the top, there is a navigation bar with links for Dashboard, Subscriptions, Services, and Support. A search bar and a user profile for Jennifer Falcon are also present. Below the navigation bar, the main content area is titled "Your Approvals" and displays a table of pending requests. The table has columns for ID, Title, Type, Requested for, Date, and Cost. Each row includes a checkmark and an X icon next to the cost value. On the left side of the main content area, there is a sidebar titled "Approval" with options for All, Service, Change, and Quote. The "All" option is currently selected.

All	ID	Title	Type	Requested for	Date	Cost
Service	Q1046	New flat screen monito...	Quote	FALCON, JENNIFER	01/23/2014	\$0.00
Change	Q1045	New flat screen monito...	Quote	FALCON, JENNIFER	01/23/2014	\$0.00
Quote	Q1043	New flat screen monito...	Quote	FALCON, JENNIFER	01/23/2014	\$0.00
Service	Q1044	New flat screen monito...	Quote	FALCON, JENNIFER	01/23/2014	\$0.00
Change	Q1040	test	Quote	FALCON, JENNIFER	01/23/2014	\$0.00
Quote	Q1037	test	Quote	FALCON, JENNIFER	01/23/2014	\$0.00
All	Q1009	Monitor is broken, nee...	Quote	BOWIE, GRAHAM	08/13/2008	\$0.00

## Approving a Service Request:

The system will send an email notification to the approver(s) with a description and link to the request that is pending their approval. The user can click on the link in the email and go to the SRC to approve the request.

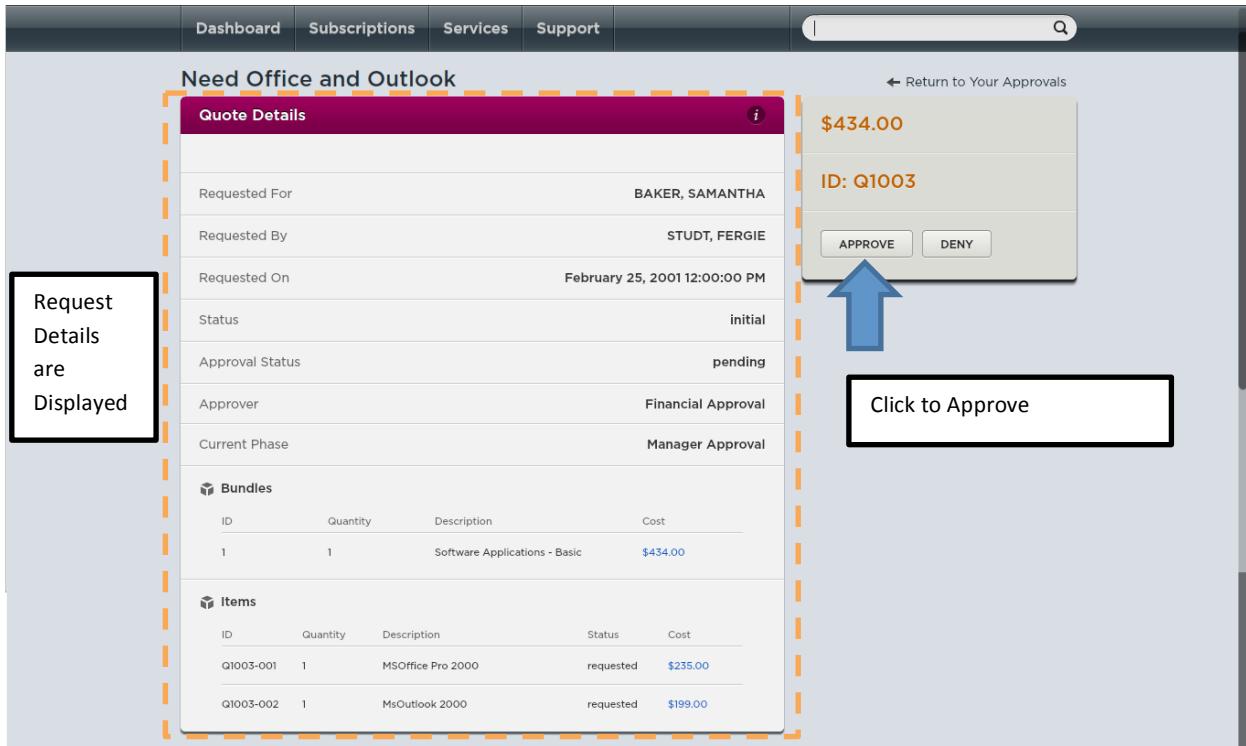
**Note:** If Single Sign-On is enabled and functional, the user will not be prompted to login to SRC. If only LDAP authentication is enabled, the user will need to enter their network credentials (user id and pw). This user information is synched with Active Directory so it isn't a separate userid and pw, but is only synched and not passed without Single Sign-On.

A screenshot of the hp Service Portal interface. The top navigation bar includes links for Dashboard, Subscriptions, Services, and Support. The user is logged in as Jennifer Falcon. A tooltip titled 'Tip' appears over the 'Approvals' button, stating: 'Click on a request to view its details. Click the check or the 'X' to approve or deny a request without viewing its details.' Below the tooltip is a 'Log Out' button. The main content area is titled 'Your Approvals' and displays a table of service requests. The table has columns for ID, Title, Type, Requested for, Date, and Cost. Each row contains a checkmark and an X icon in the last column. The table shows eight rows of data. On the left, there is a sidebar titled 'Approval' with options: All, Service, Change, and Quote. An orange callout box on the right side of the screen contains the following text:

You can either Approve or Deny a Service Request from the Record List, however it's not recommended without first viewing the details of the request.

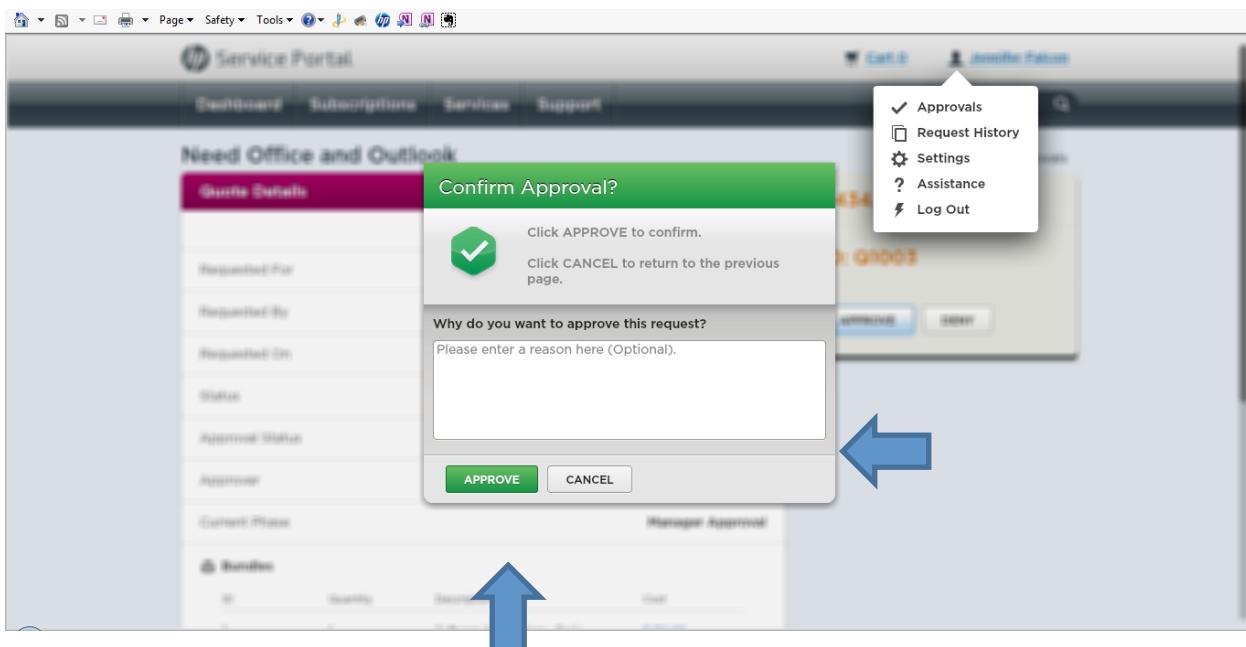
All	ID	Title	Type	Requested for	Date	Cost	Actions
Service	Q1046	New flat screen monito...	Quote	FALCON, JENNIFER	01/23/2014	\$0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
Change	Q1043	New flat screen monito...	Quote	FALCON, JENNIFER	01/23/2014	\$0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
Quote	Q1044	New flat screen monito...	Quote	FALCON, JENNIFER	01/23/2014	\$0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Q1040	test	Quote	FALCON, JENNIFER	01/23/2014	\$0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Q1037	test	Quote	FALCON, JENNIFER	01/23/2014	\$0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Q1009	Monitor is broken, nee...	Quote	BOWIE, GRAHAM	08/13/2008	\$0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Q1005	New PC to replace out...	Quote	BLICK, STEVIE	07/02/2008	\$1,380.00	<input checked="" type="checkbox"/> <input type="checkbox"/>

Open the request you want to approve by clicking on it to view the details and if satisfied with the request, Click the Approve button.

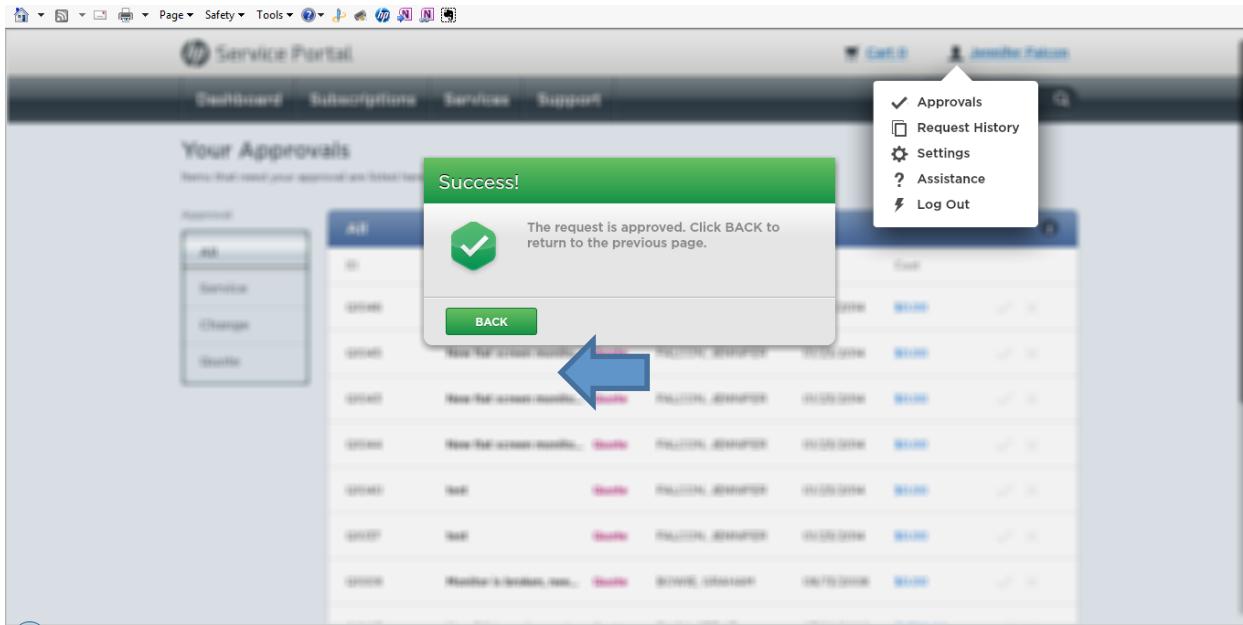


When you click Approve you will need to provide a justification for the Approval.

**Note:** This justification step cannot be configured to be bypassed.



When you have completed the Approval confirmation, click Approve. The system will display a dialogue box that indicates that the Approval was successfully completed. To return to the list, Click Back.

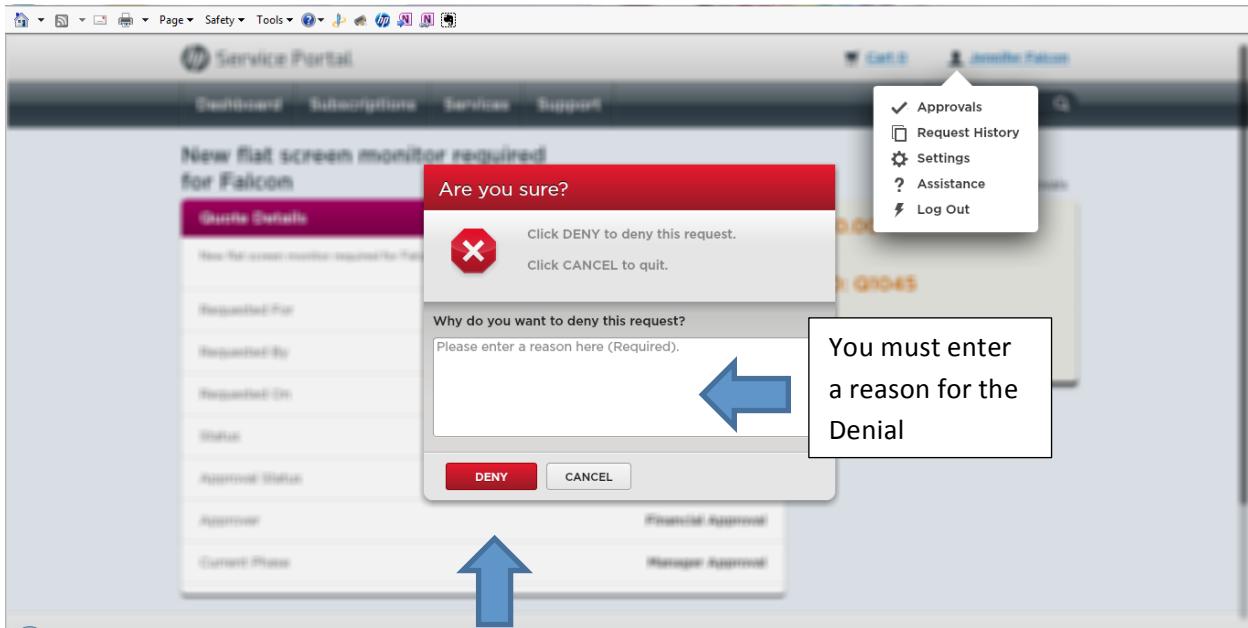


#### Deny A Service Request:

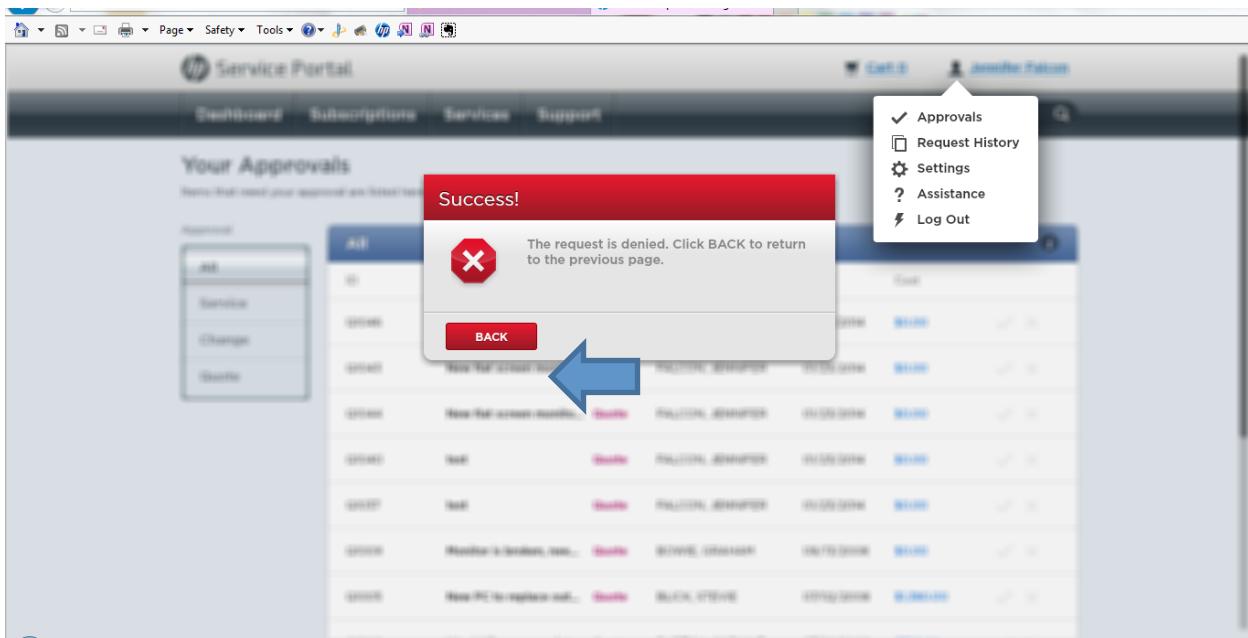
An approver can deny a Service Request for specific business reasons, such as not enough information, insufficient justification, etc. To deny a Service Request, open the Service Request from the Pending Approval list.

**Note:** Denials at the Service Request (Interaction) is a Denial All, Approval All situation – so if more than 1 service is added to a single Service Request, all requests are denied. The ability to allow multiple services on a single Service Request is for increased usability for end users, unfortunately, this is the trade-off of allowing that. This means that no Request (Quote) will ever be generated if the Service Request level approval is Denied.

**Note:** Denials done at the Quote level will prevent any Line Items from being created for the specific request. However, if multiple services are allowed, once the Service Request approval is granted, the system will create multiple Quotes that are associated to that single SD #. Denials on 1 Quote only affect that particular Quote.



After a reason for the Denial is entered, Click the Deny button. The system will display confirmation that the Denial has been successfully completed.



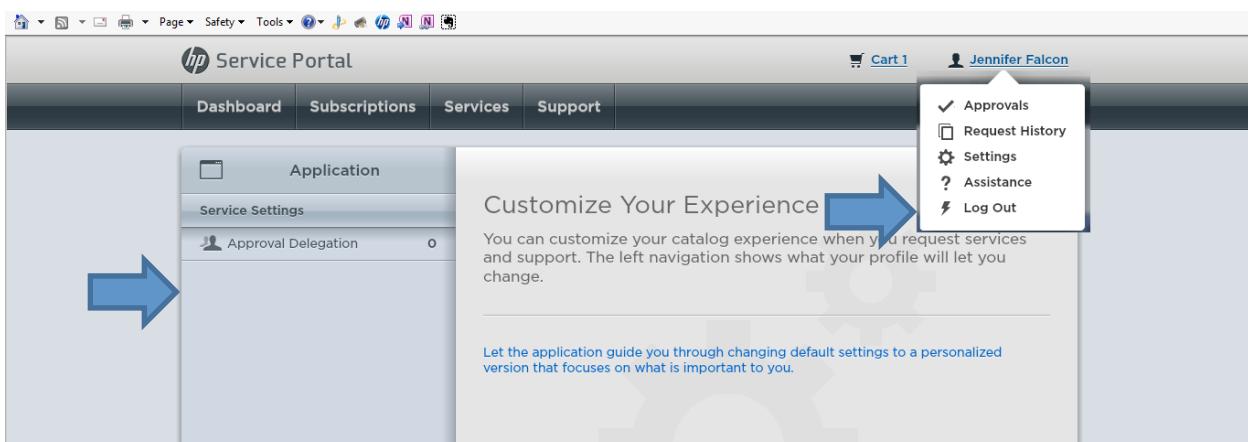
Click the Back button to return to the list of pending requests. Upon denial, an email notification to the Contact who submitted the request will be sent including the reason for the denial. Denied Service Requests remain in a Denied status.

### **Approval Delegation:**

You can delegate approvals if you are going to be out of the office. The approval delegation works similar to an out of office request in email and allows you to designate a start and end time for the delegation. All delegations are captured in the HPSM system and an audit trail can be viewed in the activities.

**Note:** You can only delegate approvals to an “authorized” approver in HPSM, meaning they must already have existing approval capabilities setup in HPSM.

To delegate approvals, click on your username and select Settings. The Application tab list display and you can select Approval Delegation.



## Subscriptions:

Subscriptions keep track of the services that you are subscribed to and all future Service Requests that have been fulfilled. Subscriptions can be at an individual or department level. Subscriptions can be a powerful tool, but often organizations choose to hide Subscriptions until they are more mature in their service definitions.

The screenshot shows the hp Service Portal interface. The top navigation bar includes links for Dashboard, Subscriptions (which is highlighted in blue), Services, Support, and a search bar. The user is logged in as Jennifer Falcon. The main content area is titled "Your Subscriptions" with the sub-instruction "Track and modify your subscriptions here." On the left, there are two vertical menus: "Subscriptions" (Personal, Departmental) and "Subscription Status" (All, Requested, Active, Cancellation..., Canceled, Denied). The central panel is titled "Personal - All" and displays a table of subscriptions. The table columns are Name, Subscriber, Date, and Status. The data includes:

Name	Subscriber	Date	Status
Business Call from Home	FALCON, JENNIFER	01/23/2014	
Employee Remote Access	FALCON, JENNIFER	01/23/2014	
PC Backup	FALCON, JENNIFER	01/23/2014	
Employee Mailbox	FALCON, JENNIFER	01/23/2014	
Flat Screen Monitor	FALCON, JENNIFER	01/23/2014	
Performance Laptop	FALCON, JENNIFER	01/23/2014	
Docking Station	FALCON, JENNIFER	01/23/2014	
MyDevices	advantage/North America - HR & ...	06/02/2008	

Subscriptions can prevent a user from requesting a service they are already subscribed to so no duplicate requests are entered.

The screenshot shows the hp Service Portal interface. The top navigation bar includes links for Dashboard, Subscriptions (highlighted in blue), Services, Support, and a search bar. The user is logged in as Jennifer Falcon. The main content area is titled "Verify Delivery Information". On the left, there are three tabs: "Delivery Information" (selected), "Contact Information", and "Attachments". A modal dialog box is open, titled "Validation failed". It contains an exclamation mark icon and the message: "1: New Mobile Employee Bundle - A Subscription for FALCON, JENNIFER already exists or is pending for item: Performance Laptop." There are "Close" and "Submit" buttons at the bottom of the dialog. The footer of the page includes the text "Service Portal IT Services and Support" and the hp logo.

Additionally, Subscriptions can be utilized and configured to restrict access of individuals who don't belong to a department authorized to request specific services.

