Service Request & Catalog Quick Flow Demo Card

SMA-X 2017.11

# Background

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| Key Messages | * SMA-X allows IT to define Service Catalogs with goods and services that can be requested by employees via the Self Service Portal or by IT Agents within the Service Desk. The Service Catalog and Request Management applications are fully integrated, providing robust functionality that includes: Rich catalog content descriptions, User options, Fulfillment task plan that can drive work and automation, Bundles that group and coordinate the fulfillment of various components |
| Customer Challenge | * No Service catalog so requests are all unique and fulfillment activities are tracked manually resulting in long delivery times and lost requests. * Or have Service Catalog but items are hard to find and interface is not user-friendly. * Request fulfillment is tracked manually or in email. |
| Engage Them | * Are your users frustrated by long delivery times for their requests? * Would your users prefer to submit their requests using an online form? * Do your users struggle with your existing Service Catalog interface? * Are your agents struggling to fulfill one-off requests using a manual or email tracking process? |
| Differentiators | * Friendly Service Catalog user interface that provides a powerful search capability based on Big Data technology. * Complex workflows, such as New Employee process, are supported. * Workflow standardization for Request fulfillment improves productivity and customer satisfaction as requests are fulfilled more quickly. * Integrated Asset Reservation workflow ensures effective use of in-stock assets for deployment. |

# Quick Flow

Quick flow is to provide a benefit oriented overview, to introduce customer to value and should be completed in ~5-10 minutes. Optional sub-flows are below. Make sure your environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide to the demo.

This card shows two use case scenarios:

* The first use case is a request by an employee for an Asset (New PC Request). What is interesting about this use case is that it not only illustrates how Catalog Offerings are defined, requested and fulfilled. It goes further by demonstrating the SMA-X’s integrated use of Stock Rooms, Asset Reservations, and the general Asset tracking lifecycle. Thus, in this concise single demo, you can show how SMA-X is not just providing another simple Catalog – it is providing a very robust solution designed around real world use cases and providing end to end integrated functionality that spans both ITSM and ITAM processes.
* The second use case illustrates the definition and fulfillment of a Bundle Offering. These are offerings that include various line item components. The demo shows SMA-X’s robust support for defining fulfillment plans for these bundles, and it shows the step by step fulfillment process, whereby a parent master Request presents an overall view of each line item’s fulfillment in a synchronized process.

| **Do** | **Say** | **Cheat Sheet** |
| --- | --- | --- |
| **Use Case 1: Request fulfillment with stock room management and asset reservation workflow** | This first use case is a request by an employee for an Asset (New PC Request). This use case illustrates how Catalog Offerings are defined, requested and fulfilled. It also goes further by demonstrating the SMA-X’s integrated use of Stock Rooms, Asset Reservations, and the general Asset tracking lifecycle.  SMA-X is not just providing another Service Catalog – it is providing a very robust solution designed around real world use cases and providing end to end integrated functionality that spans both ITSM and ITAM processes. |  |
| **Catalog Request by business user**   * For boot camp, In Firefox, Login as [amy.lopezmf](mailto:amy.lopezhpe@gmail.com), start in ESS and Request a New PC: * You can show this by searching for “**new PC**”   or by navigating into the **PC, Laptop, …** category.   * Highlight the price shown at the bottom. Then play with the various options to show:   + How changing PC Type alters the price and additional options * For the final user option setting, select the “**Travel Friendly**” PC, and Submit * *Optional, for Travel Friendly, you can also select the request to be marked Urgent, and when you do, a required Justification field is added to the form.* * *Optional, choose “High Performance” PC which will require an approval by Amy’s manager,* [*joe.managermf*](mailto:joe.managerhpe@gmail.com) *which can be done in ESS or the mobile client* | * Offering details can be configured to be dynamic as the user interacts with them * Prices can vary according to location and according to configuration options * Dynamic rules can also alter the display of other options and introduce new validations into the request | * Request a New PC offering * Play with options * Travel Friendly |
| **Request Fulfillment**   * In Chrome, Login as [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com), as an Agent, go to Service Request module and find the newly created Request, and drill down to view the Workflow tab: The request is pre-approved and is now in Fulfillment * Show Task Plan tab, and note that the Automated **Reserve PC** task has executed, and we’re now pending a Manual Task to **Prepare PC** * Show Reservation Tab, and note the Laptop that has been reserved (you can drill down to view details of the Asset) | * Automatic tasks run as soon as their Task Plan execution path is ready. Here you can track their status. * The Asset Reservation workflow has reserved a PC with the correct asset model from the appropriate stock room. | * Workflow tab * Task plan * Reservation |
| * Go to the Task Inbox and see the **Prepare PC** task * Note the Task details on the right, including a reference to the parent record * Press the “Validate” button and Save to mark the task done * Refresh the Task Inbox to find the final Task: **Deliver PC,** and mark it as Validated as well * (You can note that the Delivery Location would be obtained from requester’s location) | * Let’s now work on the Manual Tasks * Manual Tasks create work that can be tracked in the Task Inbox. Each Assigned Task Worker has access to the task details as well as to the parent request record. As they complete their task and mark it Done, the Task Plan execution can continue | * Prepare PC task * Validate task, Save * Refresh * Deliver PC task * Validate task, Save |
| * Back on the Request, Refresh Task Plan tab to show all remaining automated tasks have executed * Refresh and go to Workflow – it has moved to Accept * As Amy, back in ESS: look in the ToDo list for the request and Accept it (you can also do the accept from the My Requests list and select this request) * As Jennifer, refresh the workflow and the Request was automatically closed | * The workflow has completed the Automated tasks that follow the Deliver PC manual task. * The request is pending Accept by the user. | * Task plan, refresh * Workflow   End User:   * Accept   Agent:   * Request was closed |
| **Asset Lifecycle**   * As Agent, Jennifer, From the Request’s Reservations Tab, drill down to view the Reservation * Within the Reservation , hover over the Reserved Device, and drill down to view the PC device * In the Device General tab, see how the User List shows Amy Lopez as the user. * On the Device Workflow tab, show how it has been assigned, moved out of stock, and is now in the In Use phase | * Let’ s review the Asset Lifecycle and User List * The Asset lifecycle tracks the asset from acquisition to receipt, in stock, prepare, in use, and through retirement. * The User List tracks who is assigned to the asset. | * Reservation * Device * General, User List * Workflow tab |
| ***Optional sub-flow: Stockrooms***   * Go to SACM Home, and drill into **Personal Computers** * Select the view **“Stock by Type and Model”** * Note in the grouping on the left site, to see the count of **In Stock** laptops and the number of each model. * Drill down to view one of the **HP Elite Folio…** PCs * General Tab: Location is set to a Stock Room, and hover over and even drill into the Stock Room | * Stock rooms work hand in hand with the Asset lifecycle. In this demonstration, we showed an automated workflow to find a laptop in a stock room, reserve, and then take it out of stock and assign it to the requester. * We can monitor the count of devices in stock rooms easily from the SACM Home page. | * SACM Home * Personal computers * “Stock by Type and Model” view to see group counts * View a specific HP EliteBook Folio * General tab shows location is a stock room * Hover and drill down to Stock room |
| ***Optional sub-flow:* *Show Offering configuration details***   * Go to Service Catalog * Click on the **OS,** **PC, and Printer** category box (not on the name link or drop-down arrow) * Click on the **PC Lifecycle** Service box * Drill down into the **(Demo) Request a New PC** offering link * General Tab: Highlight the Offered Asset Model. (If there is interest, open it in a separate tab to show interesting model details, for example, pricing could be used to control Approval rules) * Task Plan/Approval: The example has a condition based on the option for type, and assigns approval to Managers (Drill down to either definition if there is interest) * Task Plans/Fulfill tab: Show the Robust flow, which includes an Automated PC Reservation task | * The Service Catalog offers a three level hierarchy keeping it simpler for users to browse the catalog or they can use the powerful search feature to find offerings. Linking an Asset Model to an Offering allows automation of how the request for the offering is fulfilled. * Sometimes, in your own catalogs, the Model will not be pre-linked, allowing the Fulfiller to decide at request time how to fulfill the request. * Task Plans allow you to define Approvals at the offering level. Approvals can be defined at a governance level as well for all requests, for example, based on price. * Task plans can include both Manual and Automated work that is part of an Offering’s fulfillment. You have great flexibility due to SMA-X’s various Business Rules that can be part of the fulfillment tasks. | * Catalog Mgmt * Catalog Hierarchy: Category, Service Definition, Offerings: * **“OS, PC and Printer”** Category * **PC Lifecycle** Service Definition * **(Demo) Request a New PC**, General * Task Plans/Approval * Task Plans/Fulfill |
| **Use case 2: Bundle request and fulfillment**  **Request New Employee bundle:**   * Login as [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com), go to SRM and press New to create a new Request: Label=**New Employee John Doe**, Description=**Need new employee package for our new hire John Doe**, Requested by=(put ***yourself****)*, Requested for: (choose any other employee you want), Offering=**New employee** * Note that after choosing the offering, the Docking Station option will appear. Leave it unset, so you can show that the plan will omit the Docking Station fulfillment * Press Save * Refresh your view to see the new tickets created > | * Because this is a request for a new Employee, we will illustrate it as initiated by a Service Desk agent. But you can also enter the request through the Self Service Portal. * *[During the demo, you can show one or the other, depending on interest]* | * SRM, new request * New Employee offering * Save |
| **Fulfill New Employee bundle request**   * Drill into newly created ticket. Note on the top right corner that the request is flagged as a “request bundle” which handles the fulfillment of a Bundle * Next, under the Task Plan, note that various items have been requested * Under Related Records, you can see the line item Child Requests * Drill down to each line item, one at a time, and mark it fulfilled by – In their Resolution section, enter a Fulfillment Code and comment. As you save each child, it will transition to Accept * Now, back on the parent request, note that the status of the children has been updated (they are all in Accept), and the parent is now also automatically transitioned to Accept | Next, let’s look at the fulfillment:   * Bundle requests are handled by the creation of a parent “master” request and a number of “child requests” for each of the line items. These requests are associated with each other so that the fulfillment of the line items will trigger an update to the process flow of the parent when fulfillment is complete. | * Parent Request - Task plan * Related records and their phase id * Fulfill all four child requests with resolution and fulfillment code |
| ***Optional sub-flow: Review Catalog Bundle configuration***   * As an Agent. Jennifer, go to Service Catalog Management, and Go To: Human Resources 🡪 Employee Lifecycle Service 🡪 New Employee (item 6 of 7 on second page) * In the General tab, note that the Offering bundle checkbox is set, and scroll down to show the bundled offerings line items * In the user options tab, show how the Docking station option is configured. * Now go to the Task Plan>Fulfill tab, and show how each of the line item Offerings has been added into a fulfillment plan and how the Docking station user option is used in the logic. | * Bundle offerings include multiple line item components. The previous use case 2 demo showed SMA-X’s robust support for defining fulfillment plans for these bundles, and it shows the step by step fulfillment process, whereby a parent master request presents an overall view of each line item’s fulfillment in a synchronized process. | * Human Resource 🡪 Employee Lifecycle Service 🡪 New Employee * Offering bundle * General * User option * Task plan |

# Optional Sub Flows

Customer intrigued after seeing this overview? Ideas for possible sub-flows/drill-downs:

| **Do** | **Say** |  |
| --- | --- | --- |
| ***Add new Offering with User Option Configuration***   * Go to Request New Keyboard offering (OS, PC and Printer > PC Accessories Service). * Duplicate this offering and add your initials to make a new unique offering nane. Save * User options tab, add a PrimaryUseLocation Medium List option, mapped to the Location list * Add a KeyboardLayout user option as a new (+ next to List name) Medium List in Alphabetical order and add item values: English U.S., English UK, Hebrew, Spanish, Chinese, Romanian and then Save. * Still on the Offering, go to the Rules tab and add a simple rule for Rendering Forms to run before the request record rules to “Define suggested values by a list to list mapping”   + Field1: KeyboardLayout   + Field 2: PrimaryUseLocation   + Mapping definition:     - Israel: Hebrew, English US, English UK     - USA: English US, Spanish     - China: Chinese, English US, English UK     - Romania: Romanian, English US, English UK   + Default: English US   + Save * In ESS as Amy, and search for new keyboard, click the offerings filter, and request the New Keyboard offering you created and demonstrate the keyboard option values offered for each location. | * The Service Catalog is very easy to configure. Here we will duplicate an existing item and add a user option. * We will ask the user for the Primary Use location and then add another option that offers the languages appropriate for that location. | * **OS, PC and Printer -> PC Accessories Service -> Request New Keyboard** * Duplicate with unique name * Add options for Primary Use Location, Keyboard Layout * Add Rendering Form business rule for Define Suggested Values by list to list mapping * Save * ESS, Request New Keyboard xx and view user options |
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## Post-demo Checklist (in addition to above)

* Return the PC you were assigned back to Phoenix Stockroom A. Phase from In Use -> Prepare -> In Stock and set Stockroom to Phoenix A. Remove Amy from User List.

# Demo Preparation in a new tenant

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Initial Set-up

* Verify that your SMA-X Person ([amy.lopezmf](mailto:amy.lopezhpe@gmail.com)) has set your location to North America/United States.
* Make sure that [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) is a member of the “Hardware Services Group”
* Create a view for Devices that are filtered by Phase ID is “In Stock” and then group by Subtype and then by Model and name it “Stock by Type and Model”.
* Modify Catalog Bundle configuration for “New Employee” to add option to make Docking Station optional and use it to determine logic in the Task Plan
* Under User Options, add a Boolean option: Name=Docking, Display Name=Do you want a docking station?
* In the Task Plan, click on the transition arrow leading to the Docking Station, and Add a decision node: Title = Docking station, condition (in case of)=${entity.UserOptions.Docking\_c} (hint, use ctl-space and demonstrate the assisted expression editor)
* After creating the transition, click on the Yes node edit pencil and select Path to, and then click on the Docking Station task, thus creating a path to order the Docking Station only when the option is selected by the user
* Click on the No path and add a “Join” node which will terminate the task execution path when there is no Docking Station desired.
* Save the offering changes

## Pre-demo Checklist (in addition to above)

* Before running, be sure that there are available Laptops of models HP ZBook 15 and HP Elitebook Folio 9470m in the Phoenix stockroom A
* Your User profile ([amy.lopezmf](mailto:amy.lopezhpe@gmail.com)) has her location set to North America/United States

## Post-demo Checklist (in addition to above)

* Return the PC you were assigned back to Phoenix Stockroom A. Phase from In Use -> Prepare -> In Stock and set Stockroom to Phoenix A. Remove Amy from User List.