



Mercury IT Governance Center™
Mercury™ Service Catalog
Configuration Guide

Version: 1.5

MERCURY™



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Chapter 1 Introduction

In This Chapter:

- *About This Document*
 - *Who Should Read This Guide*
 - *Prerequisite Documents*
 - *Related Documents*
 - *Overview of Service Catalog*
 - *Catalog Management*
 - *Selections and Orders*
 - *Approvals and Fulfillments*
-

About This Document

Mercury™ Service Catalog presents an interface for you to order service items offered by your IT organization. Using a browser, you can browse or search through a catalog of published service items, adding the required service items to a cart. Once ready to check out, you are guided through a checkout process that specifies additional details for each service item in the cart. When the order is placed, individual requests are generated for each service item. The service items are then moved along the appropriate approval process until the service item is fulfilled.

This document is organized in the following way:

- [Chapter 1, *Introduction*, on page 11](#)

This chapter presents an overview of this document and an overview of how Service Catalog works and interacts with Mercury Demand Management™.

- [Chapter 2, *Installing and Licensing Service Catalog*, on page 17](#)

This chapter details the step-by-step procedures on how to license and install Service Catalog. This chapter also includes a description of the access grants associated with Service Catalog.

- [Chapter 3, *Designing Catalogs*, on page 21](#)

Once Service Catalog is licensed and access grants set, you can begin designing the Service Catalog database that stores the catalog or catalogs of Service Catalog.

- [Chapter 4, *Configuring Catalogs*, on page 31](#)

After designing Service Catalog, you must create the catalog, category, and service item spreadsheets. These spreadsheets are then imported into and become the Service Catalog database.

- [Chapter 5, *Configuring Demand Management*, on page 55](#)

Once the Service Catalog database is created, you must configure Mercury Demand Management to access the Service Catalog functionality. This chapter details how to configure Demand Management for Service Catalog.

- [Chapter 6, *Mercury Service Catalog Content*, on page 71](#)

Service Catalog comes with optional predefined content to help quickly configure your service catalog. This chapter details the predefined content and tells how to install and configure this predefined content.

Who Should Read This Guide

The intended audience for this guide is:

- Mercury IT Governance configurators
- Mercury IT Governance administrators

Prerequisite Documents

Prerequisite documents for this guide are:

- *Mercury Demand Management User's Guide*
- *Mercury Demand Management Configuration Guide*

Related Documents

Related documents for this guide are:

- *Mercury Service Catalog User's Guide*

Overview of Service Catalog

Mercury Service Catalog presents an interface you use to order service items offered by your IT organization. The main components of Service Catalog are:

- Catalog Management
- Selections and Orders
- Approvals and Fulfillments

Catalog Management refers to the catalogs and service items offered by your IT organization. Using the XML import tool, administrators configure and maintain the catalogs of Mercury Service Catalog.

Selections and Orders are a series of Mercury IT Governance Dashboard™ pages where you can browse and search catalogs, adding the required service items to your cart. Once ready to check out, you are guided through a checkout process that specifies additional details for each service item in the cart.

Approvals and Fulfillments uses the functionality of Mercury Demand Management to move your service items (requests) along an approval process (workflow) until the service item is fulfilled.

Figure 1-1 Illustrates the main Service Catalog components.

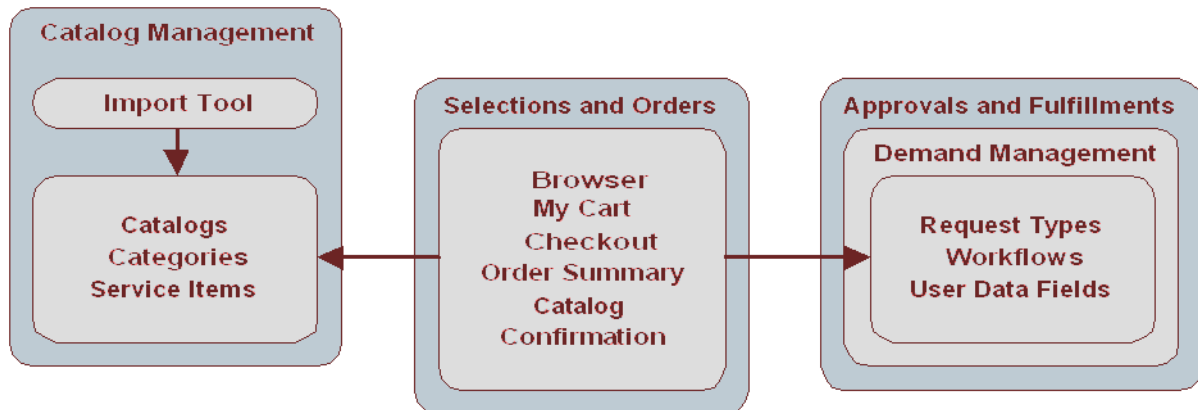


Figure 1-1. Service Catalog functional components

Catalog Management

Catalog management is the authoring and storage component of Service Catalog. When browsing and searching for goods and services, those goods and services are read from a catalog. Catalogs are created specifically by and for Service Catalog. These catalogs are maintained using the Service Catalog XML Generator. This tool is used to configure the catalog, categories, and service items within Microsoft Excel. The tool contains macros that convert the Microsoft Excel data into XML files. The Mercury IT Governance Center™ front end contains an import utility to load the XML files into the system. This feature makes it easy for service owners to manage aspects of their catalog such as descriptions, pricing, and service configuration settings without requiring access to the Mercury IT Governance Workbench.

The following chapters cover Catalog Management:

- [Chapter 3, *Designing Catalogs*, on page 21](#)
- [Chapter 4, *Configuring Catalogs*, on page 31](#)

Selections and Orders

Selections and orders is where you shop for goods and services. Use Selections and Orders to search or browse for service items in a catalog, add items to your cart, and finally checkout the selected goods or services. The following lists Selections and Orders Dashboard pages:

- **Service Catalog Browser.** The Service Catalog Browser is a Dashboard page configured to search and browse for service items to add to your cart.
- **My Cart.** My Cart lists the service items selected from a catalog.
- **Checkout.** Checkout is where an order is created for the service items in your cart and requests are generated for each service item. During checkout, you might be required to provide additional information for each request.
- **Order Summary.** Order Summary is where you can view all of your requested service items before placing the order.
- **Confirmation.** Confirmation confirms that your requests have been submitted to Approvals and Fulfillments and are now following a standard Mercury Demand Management workflow.

The *Mercury Service Catalog User's Guide* covers selections and orders.

Approvals and Fulfillments

Approvals and fulfillments is where individual Demand Management requests are generated for each service item. The requests (service items) are then moved along the appropriate workflow (approval process) until the service item is fulfilled.

Mercury Demand Management workflows can follow complex business rules by using different approval methods. Email and pager notifications can be generated as the request passes through the various stages of the workflow. Prioritization and delegation features allow requests to efficiently advance through their specific workflow, routing them to the relevant department, group, or individual.

[Chapter 5, *Configuring Demand Management*, on page 55](#) covers approvals and fulfillments.

Chapter

2

Installing and Licensing Service Catalog

In This Chapter:

- *System Requirements for Service Catalog*
 - *Installing Service Catalog*
 - *Assigning Service Catalog Licenses*
 - *Configuring Service Catalog Access Grants*
-

System Requirements for Service Catalog

Mercury Service Catalog has the following prerequisites:

- Server: Mercury IT Governance Center 6.0 Service Pack 13
- Workstation: Microsoft Excel 2003

Installing Service Catalog

Service Catalog comes bundled as part of Mercury IT Governance Center 6.0 Service Pack 13. See the readme for Service Pack 13 for details about installing the service pack.



Note

Service Catalog includes a separate package of predefined configurations, as well as a comprehensive set of portlets that can track and manage catalog demand, to jump-start your usage of Mercury Service Catalog. For more information concerning these predefined configurations and portlets, and how to install this package, see [Chapter 6, *Mercury Service Catalog Content*, on page 71](#).

Assigning Service Catalog Licenses

All users accessing Service Catalog must be assigned a Service Catalog license and a Demand Management license.



Note

For more information on how to assign licenses, see the *Security Model Guide and Reference*.

Configuring Service Catalog Access Grants

Once a user is assigned a Service Catalog license and a Demand Management license, the user must also be assigned the correct access grants for their level of access. *Table 2-1* lists the Service Catalog access grants. Look for Service Catalog access grants under the Service Catalog access grant category.

Table 2-1. Service Catalog access grant descriptions

Category	Access Grant	Description
Service Catalog	Request Services For Me	Allows the user to request services through Service Catalog for themselves.
Service Catalog	Request Services For All Users	Allows the user to request services through Service Catalog for another user in addition to requesting services for themselves.
Service Catalog	Manage Service Catalogs	Allows the user the administrative power to update the Service Catalog catalog, category, and service item definitions using the XML Import Tool.

For example, a user of Service Catalog would need the following access grants:

- Service Catalog: Request Services For Me
- Demand Management: Edit Requests

For example, a user of Service Catalog who requests services for someone else, as well as themselves, would need the following access grants:

- Service Catalog: Request Services For All Users
- Demand Management: Edit Requests

In addition, for an administrator to import XML files for Service Catalog, would need the following additional access grant:

- Service Catalog: Manage Service Catalogs



Note

For more information on how to assign access grants, see the *Security Model Guide and Reference*.

Chapter 3 Designing Catalogs

In This Chapter:

- *Designing a Catalog*
 - *Designing Catalog Hierarchy*
 - *Inherited Attributes*
 - *Designing Entitlements for Catalog Access*
 - *About Security Groups and Organization Units*
 - *Designing Bundling for Service Items*
 - *Designing the Catalog's User Interface*
 - *How Service Item Are Displayed*
 - *Changing the Terms Cart and Order*
 - *Designing Service Catalog Images and URLs*
-

Designing a Catalog

This chapter discusses how to design catalogs for Service Catalog. Designing a catalog is the first step in configuring Service Catalog. Once catalogs are designed, they must be configured in Microsoft Excel, converted into XML files, and imported into an Mercury IT Governance Center instance. For information concerning configuring catalogs in Microsoft Excel, converting the spreadsheets into XML files, and importing the XML files into a Mercury IT Governance Center, see [Chapter 4, Configuring Catalogs, on page 31](#).

To design your Service Catalog catalogs, you should understand the following:

- Configuring catalog hierarchy
- Configuring entitlements
- Configuring bundles
- Configuring the user interface

Designing Catalog Hierarchy

A Service Catalog is a hierarchical structure in which service items are categorized and organized for efficient browsing and ordering. The following are the main concepts of the Service Catalog hierarchical structure:

- **Catalog.** The catalog is the highest-level entity in a catalog. The catalog encapsulates all items in a specific catalog. Multiple catalogs can be defined but users can only request services from one catalog at a time. Each catalog contains one or more categories (logical grouping), and categories can contain child categories and service items. Users can add service items from one catalog to their shopping cart. Users cannot add service items from multiple catalogs to their shopping cart.
- **Categories.** Categories (and sub-categories) are logical groupings which can contain sub-categories and/or service items. Categories are used to organize service items found in a single catalog.
- **Service Items.** Service items are the actual goods and services a user adds to a shopping cart.

Figure 3-1 shows an example of catalog hierarchy for Service Catalog.

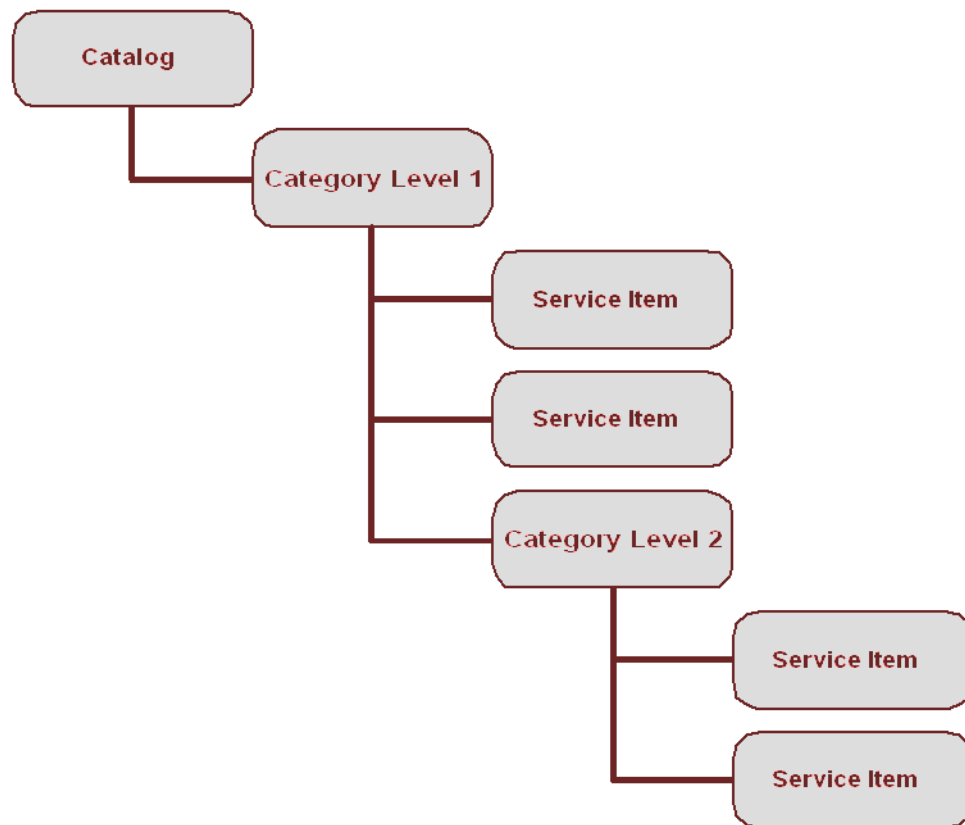


Figure 3-1. Catalog hierarchy

Inherited Attributes

Attributes exist at each level of the catalog hierarchy. These attributes define various characteristics used by Service Catalog, such as the default request type for the catalog or the entitlement for a category. When an attribute is set at the catalog or category level of the hierarchy, that attribute is inherited by all subsequent sub-categories and service items unless the attribute is overridden by a subsequent sub-category or service item.

For example, you could set the default request type at the catalog level and all categories and service items in the catalog will have the same default request type. Likewise, if you set the default request type at the catalog level, you can change the default request type at each category level and at each service item. For a complete list of catalog, category, and service item attributes, see [Chapter 4, *Configuring Catalogs*, on page 31](#).

Designing Entitlements for Catalog Access

Entitlement refers to whether a user is “entitled” to access a catalog, category, or service item. In Mercury IT Governance Center, entitlements are assigned based on security groups and organization units. Entitlements can be specified at the catalog, category, and the service-item level (see [Figure 3-2](#)).

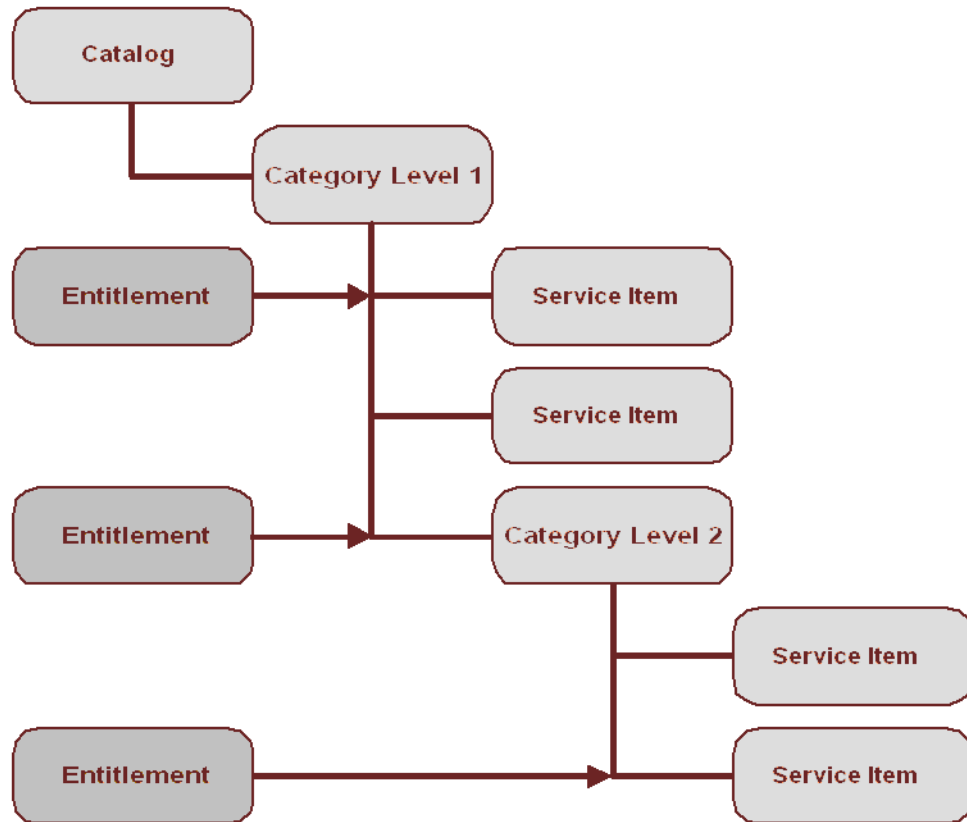


Figure 3-2. Catalog hierarchy with entitlements

About Security Groups and Organization Units

Service Catalog uses entitlement as a way of allowing and denying users access to catalogs, categories, and service items. Security groups and organization are standard Mercury IT Governance Center entities.



Note

You must have the proper licenses and access grants to view the security groups and organization units. For more information, see the *Security Model Guide and Reference*.

To view the security groups:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Open Workbench**.

The Workbench opens.

3. From the shortcut bar, select **Sys Adm > Security Groups**.
4. On the **Query** tab of the Security Group Workbench, click **List**.

The existing security groups are listed.

To view the organization units:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Search > Organization Units**.

The Search for Organization Units page opens.

3. Search for all Organization Units.

Designing Bundling for Service Items

Service items can be bundled together, giving users the convenience of selecting one service item and having several bundled service items added to their cart. Bundled service items can be required or optional. Bundled service items that are required cannot be removed by the user. Bundled service items that are optional can be removed by the user.

For example, you can bundle a standard set of software with each laptop offered as a service item. In this scenario, you could make the operating system a required bundled service item while making the spreadsheet software optional. Note that each of the bundled service items, both optional and required, must separately exist in the catalog as individual service items (see [Figure 3-3](#)).

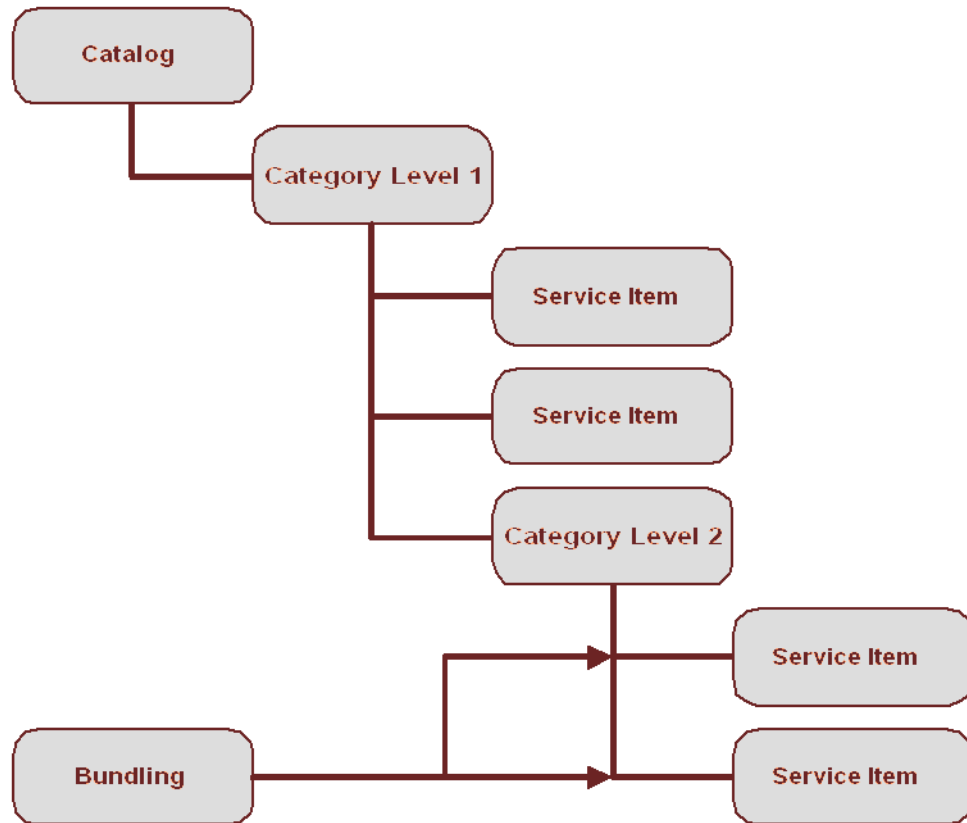


Figure 3-3. Catalog hierarchy with bundling

Designing the Catalog's User Interface

You can design specific attributes of the user interface for Service Catalog. These attributes are:

- How service items are displayed
- Changing the terms Cart and Order
- Adding images to the service items

How Service Item Are Displayed

Service items have a core set of attributes that are defined by the service item, such things as the name of the service item, the price, and the description. At the catalog-level, you can specify which of these service item attributes to display in the browser using the Service Attributes catalog attribute (see [Figure 3-4](#)).

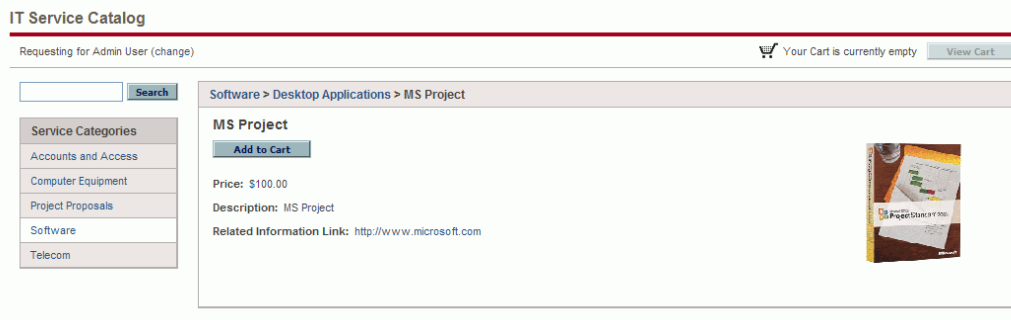


Figure 3-4. Service item displayed in browser

[Table 3-1](#) lists the default tokens for Service Attributes. For more information concerning the catalog attribute Service Attributes, see [Defining Catalog Attributes](#) on page 34.

Table 3-1. Service Attribute default token names (page 1 of 2)

Token	Description
NAME	Always shown. The name of the service item.
DESCRIPTION	A description of the service item.
IMAGE_LOCATION	A picture is displayed. An image to display in the browser.

Table 3-1. Service Attribute default token names (page 2 of 2)

Token	Description
RELATED_INFO_LINK	A clickable link. A link to the location (URL) of related information.
SERVICE_PROVIDER	The name of the service provider.
PRICE	The price of the service item.
TIME_ESTIMATE	A time estimate of how long it will take to complete the request for the service item.
MAX_ORDER_QUANTITY	The maximum number of service items that can be ordered at one time.

Changing the Terms Cart and Order

The Selections and Orders user interface is configurable. By default, the terms “Cart” and “Order” are displayed in the user interface, however, these two terms can be changed (see [Figure 3-5](#) and [Figure 3-6](#)). Changing the terms cart and order happen by assigning each a new name at the catalog level. See [Chapter 4, Configuring Catalogs, on page 31](#) for more information on the catalog-level attributes for the terms “Cart” and “Order.”

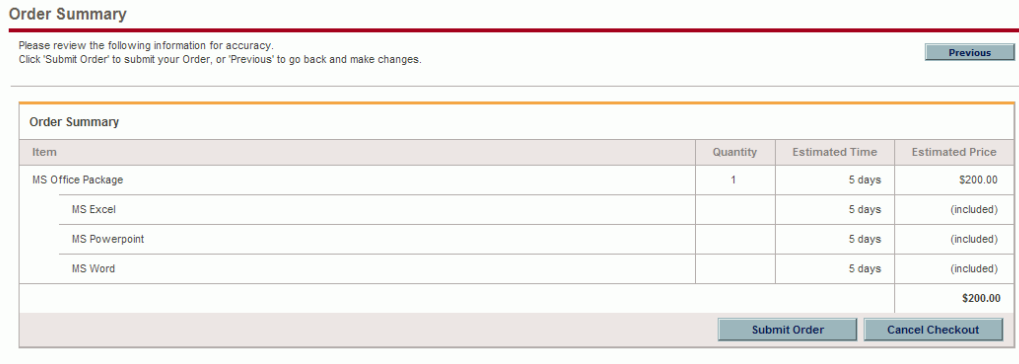


Figure 3-5. Service Catalog Order Summary

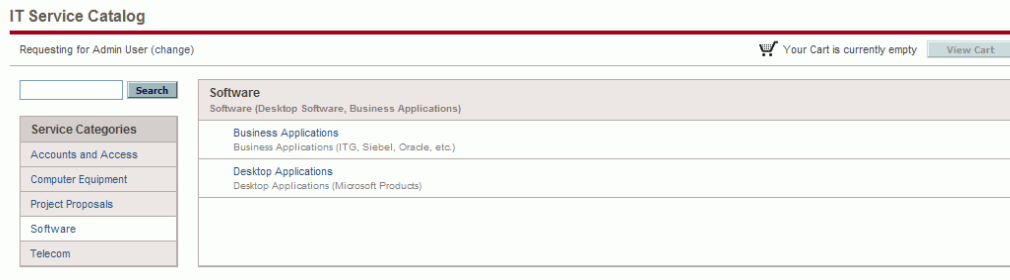


Figure 3-6. Service Catalog Browser Services, Cart

Designing Service Catalog Images and URLs

This section details information about configuring Service Catalog images and related information URLs. Images can be displayed by the Service Catalog browser page by configuring the Image Location service item attribute. When specifying an image in Image Location, the complete URL must be specified. The image file must be in a format readable by user browsers. The URL cannot be longer than 2,000 alphanumeric characters.

For example:

```
http://example.com/image1.gif
```

If the image is on the Mercury IT Governance server, the image must be in a directory within the server's Web deployment area to ensure that they are Web-accessible. A Mercury IT Governance server's Web deployment area is dependent on the Mercury IT Governance default URL location. Check with your Mercury IT Governance Center administrator for more information concerning your Mercury IT Governance Server's default URL location. If Service Catalog images are to be stored on the Mercury IT Governance Server, in most cases it is recommended that a new subdirectory be created for these images under the directory:

```
<ITG_home>/server/kintana/deploy/itg.war/html/
```

For example:

```
<ITG_home>/server/kintana/deploy/itg.war/html/catalogImages/
```

Place your image files in this new subdirectory. Taking `image1.gif` as an example image file, the new file should now be located at:

```
<ITG_home>/server/kintana/deploy/itg.war/html/catalogImages/
image1.gif.
```

The actual URL for the image would be:

```
http://<server>:<port>/itg/html/catalogImages/image1.gif
```

Where <server>:<port> is the DNS name and HTTP port number for your Mercury IT Governance Server. For example:

```
http://itgsite:8080/itg/html/catalogImages/image1.gif
```



Note

Image locations are displayed as images. Related information locations are displayed as clickable links.

Chapter 4 Configuring Catalogs

In This Chapter:

- *Configuring Catalogs for Service Catalog*
 - *Configuring Spreadsheets*
 - *Defining Attributes for the Spreadsheets*
 - *Installing the Microsoft Excel Add-in File*
 - *Downloading the Microsoft Excel Add-in File for Service Catalog*
 - *Installing the Microsoft Excel Add-in File for Service Catalog*
 - *Converting Spreadsheets into XML Files*
 - *Converting the Catalog Spreadsheet into an XML File*
 - *Converting Category Spreadsheets into XML Files*
 - *Converting Service Item Spreadsheets into XML Files*
 - *Importing XML Files into Service Catalog*
 - *Synchronizing Imported XML Data*
-

Configuring Catalogs for Service Catalog

This chapter discusses how to configure catalogs for Service Catalog. Once catalogs are designed, they must be configured in Microsoft Excel, converted into XML files, and imported into a Mercury IT Governance Center instance. For information concerning how to design catalogs, see [Chapter 3, *Designing Catalogs*, on page 21](#).

Configuring a Service Catalog catalog requires the following steps:

1. Configure your Microsoft Excel spreadsheets for Service Catalog (see [Configuring Spreadsheets](#)). The following lists the spreadsheets you must configure:
 - A catalog spreadsheet.
 - Spreadsheets for categories. Each categories spreadsheet must be for one and only one catalog.
 - Spreadsheets for service items. Each service item spreadsheet must be for one and only one catalog.
2. Download and install the Microsoft Excel Add-in file for Service Catalog on your workstation. See [Installing the Microsoft Excel Add-in File on page 43](#).
3. Convert your Service Catalog spreadsheets to XML files (see [Converting Spreadsheets into XML Files on page 46](#)).
4. Import each of the XML files using Service Catalog XML Import tool (see [Importing XML Files into Service Catalog on page 52](#)).

Configuring Spreadsheets

To configure a catalog for Service Catalog, you must create separate Microsoft Excel spreadsheets as follows:

- Configure one spreadsheet for the catalogs of Service Catalog.
- Configure multiple spreadsheets for the categories of Service Catalog. Each category spreadsheet must be for one and only one catalog.
- Configure multiple spreadsheets for the service items of Service Catalog. Each service item spreadsheet must be for one and only one catalog.

When entering data into one of the spreadsheets, the first row in the spreadsheet is reserved for the header field names (see *Figure 4-1*). These header field names must be included in the top row of the spreadsheet. Header field names determine where your spreadsheet data is loaded into the Service Catalog tables, not the position of the columns on the spreadsheet. The second row and all subsequent rows in the spreadsheet are for the actual attribute of each catalog, category, and service item.



Note

Delimiters are specified when the Service Catalog spreadsheets are converted into XML files.

When configuring your actual Microsoft Excel spreadsheets for Service Catalog, you should know and understand the following:

- How to design your catalog (see [Chapter 3, *Designing Catalogs*, on page 21](#))
- The names of your Security Groups and Organization Units (see [Chapter 3, *Designing Catalogs*, on page 21](#))
- The location of your images and related information URLs.

	A	B	C	D	E	F	G
1	Item Identifier	Category Identifier	Request Type	Show On Checkout	Catalog Name	Required Bundled Items	Optional Bundled Items
2	Desktop001	HW_WIN	Hardware Service Request	Y	IT Service Catalog	Monitor003,Mouse001,MSWINOSXP	
3	Desktop002	HW_WIN	Hardware Service Request	Y	IT Service Catalog		
4	Monitor001	HW_WIN	Hardware Service Request	Y	IT Service Catalog		
5	Monitor002	HW_WIN	Hardware Service Request	Y	IT Service Catalog		
6	Monitor003	HW_WIN	Hardware Service Request	Y	IT Service Catalog		
7	Mouse001	HW_WIN	Hardware Service Request	Y	IT Service Catalog		
8	Mouse002	HW_WIN	Hardware Service Request	Y	IT Service Catalog		
9	MSWINOSXP	SW_WIN	Software Service Request	Y	IT Service Catalog	MSWINExp,MSWINOutlook	MSWINExcel,MSWINWord
10	MSWINExcel	SW_WIN	Software Service Request	Y	IT Service Catalog		
11	MSWINWord	SW_WIN	Software Service Request	Y	IT Service Catalog		
12	MSWINExp	SW_WIN	Software Service Request	Y	IT Service Catalog		
13	MSWINOutlook	SW_WIN	Software Service Request	Y	IT Service Catalog		

Figure 4-1. Spreadsheet example

Defining Attributes for the Spreadsheets

Attributes are the fields required to define a catalog, category, or service item within the Service Catalog database. The following sections list the fields and definitions for the attributes of catalogs, categories, and service items.

Defining Catalog Attributes

Table 4-1 lists the fields, data types, and definitions for catalog attributes. Spreadsheets with catalog attributes are converted into XML files by the Mercury SC Catalogs XML Generator.

Table 4-1. Catalog attribute fields (page 1 of 3)

Catalog Attribute	Description
Catalog Name	(Required) Name of the catalog. The name of the catalog must be unique. A maximum of 200 alphanumeric characters. For example: Service Catalog
Description	(Optional) Description of the catalog. A maximum of 4,000 alphanumeric characters. For example: Hardware catalog for Americas.
Vendor	(Optional) Identifies the vendor of this catalog, if applicable. A maximum of 200 alphanumeric characters. For example: Apple

Table 4-1. Catalog attribute fields (page 2 of 3)

Catalog Attribute	Description
Default Request Type	(Required) Name of the default request type for this entire catalog. For example: Service Request Type
Cart Name	(Required) The word Cart is configurable as displayed by the browser. A maximum of 200 alphanumeric characters. For example: Agreement
Order Name	(Required) The word Order is configurable as displayed by the browser. A maximum of 200 alphanumeric characters. For example: Agreement
Org Unit Restrictions	(Optional) List of organization unit names. The user must be a member of one of the listed organization units to see this catalog. Leave this attribute empty for all users to access. Enter the term none in Org Unit Restrictions or Security Group Restrictions to deny access to all users. For example: Americas:Europe:Asia
Security Group Restrictions	(Optional) List of security groups names. The user must be a member of one of the listed security groups to see this catalog. Leave this attribute empty for all users to access. Enter the term none in Org Unit Restrictions or Security Group Restrictions to deny access to all users. For example: Dev Sec Grp:Finance Sec Grp

Table 4-1. Catalog attribute fields (page 3 of 3)

Catalog Attribute	Description
Service Attributes	<p>(Required) The tokens for the service item attributes seen using the Service Catalog browser page. The possible default values are:</p> <ul style="list-style-type: none"> • NAME (always shown) • DESCRIPTION • IMAGE_LOCATION (a picture is displayed) • RELATED_INFO_LINK (a clickable link) • SERVICE_PROVIDER • PRICE • TIME_ESTIMATE • MAX_ORDER_QUANTITY <p>For example: NAME:DESCRIPTION:PRICE</p> <p>You can also specify custom attributes. Custom attributes are added to the service item spreadsheet as user data fields. For additional information on Service Attributes, see Designing Service Catalog Images and URLs on page 29.</p>
<p>Custom User Data Column Head. The token name of the corresponding user data field is included in the spreadsheet's header field. For example: SC Catalog Owner</p>	<p>(Optional) Service Catalog allows for added user data fields to be added to catalogs. For example: John Smith</p>

Defining Category Attributes

Table 4-2 lists the fields, data types, and definitions for category attributes. Spreadsheets with category attributes are converted into XML files by the Mercury SC Categories XML Generator.

Table 4-2. Category attribute fields (page 1 of 2)

Category Attribute	Description
Catalog	<p>(Required) Parent catalog for this category. All categories must belong to a parent catalog. The service catalog name must be listed in the Catalog Name column of the catalog spreadsheet (see Table 4-1). A maximum of 200 alphanumeric characters. For example: Service Catalog</p> <p>The name of the catalog is typed into the Catalog field of the Mercury SC Categories XML Generator window.</p>
Category Identifier	<p>(Required) Unique alphanumeric identifier for the category. Will act as the primary key for the spreadsheet (database table). The Category Identifier is not seen by the user. For example: HW_WIN_NT</p>
Parent Category Identifier	<p>(Optional) Assumes that this is a child (Category Level 2 or lower) category. Leave this cell empty to denote that this category as a Category Level 1 (parent) category.</p> <p>Sets the parent and child hierarchy between two categories (Category Level 1 and Category Level 2) within a catalog. Enter the unique alphanumeric identifier of the parent Category Identifier for this child category. The parent Category Identifier must appear on the spreadsheet before this child category. For example: HW_WIN</p>
Category Name	<p>(Required) The name for this category as seen by the user in Selections and Orders. A maximum of 200 alphanumeric characters. For example: Windows NT Hardware</p>
Description	<p>(Optional) Description of the category. A maximum of 4,000 alphanumeric characters. For example: Windows NT hardware.</p>
Default Request Type	<p>(Optional) Name of the default request type for this entire category. Leave this cell empty to default to the catalog (or higher level category) service request type. For example: Service HW Request Type</p>

Table 4-2. Category attribute fields (page 2 of 2)

Category Attribute	Description
Org Unit Restrictions	(Optional) List of organization unit names. The user must be a member of one of the listed organization units to see this category. Leave this attribute empty for all users to access. Enter the term none in Org Unit Restrictions or Security Group Restrictions to deny access to all users. For example: Americas:Europe:Asia
Security Group Restrictions	(Optional) List of security groups names. The user must be a member of one of the listed security groups to see this category. Leave this attribute empty for all users to access. Enter the term none in Org Unit Restrictions or Security Group Restrictions to deny access to all users. For example: Dev Sec Grp:Finance Sec Grp

Defining Service Item Attributes

Table 4-3 lists the fields, data types, and definitions for service item attributes. Spreadsheets with service item attributes are converted into XML files by the Mercury SC Service Item XML Generator.

Table 4-3. Service item attribute fields (page 1 of 5)

Service Item Attribute	Description
Catalog	<p>(Required) Parent catalog for this service item. All service items must belong to a parent catalog. The service catalog name must be listed in the Catalog Name column of the catalog spreadsheet (see Table 4-1). A maximum of 200 alphanumeric characters. For example:</p> <p>Service Catalog</p> <p>The name of the catalog is typed into the Catalog field of the Mercury SC Service Item XML Generator window.</p>
Item Identifier	<p>(Required) Unique alphanumeric identifier for this service item. Will act as the primary key for this spreadsheet (database table). This unique alphanumeric identifier is not seen by the user. For example:</p> <p>Mouse_Opt_01</p>
Category Identifier	<p>(Required) The Category Identifier from this service item's parent category. From the category attribute fields, Category Identifier (see Table 4-2). The Category Identifier is not seen by the user. For example:</p> <p>HW_WIN_NT</p>
Name	<p>(Required) The name for this service item as seen by the user in Selections and Orders. A maximum of 200 alphanumeric characters. For example:</p> <p>USB Port Optical Mouse</p>
Description	<p>(Optional) A description of the service item. A maximum of 4,000 alphanumeric characters. For example:</p> <p>Logitech USB Port Optical Mouse for laptops and desktops.</p>
Short Description	<p>(Optional) A brief description of the service item. For example:</p> <p>Xtra Laptop Mouse</p> <p>Note that Short Description is copied into the Description field of requests generated for service items.</p>

Table 4-3. Service item attribute fields (page 2 of 5)

Service Item Attribute	Description
Image Location	<p>(Optional) The location of the image displayed by the Service Catalog browser page when the service item is accessed. The complete URL for the image. The image file must be in a format readable by user browsers. The URL cannot be longer than 2,000 alphanumeric characters. For example:</p> <p>http://example.com/image1.gif</p> <p>For more information concerning image locations, see and for information concerning image locations on the Mercury IT Governance Server, see Designing Service Catalog Images and URLs on page 29.</p>
Related Info URL	<p>(Optional) The location of the URL (clickable link) displayed by the Service Catalog browser page. Clicking the link opens the URL, providing additional information concerning the service item. The complete URL. A maximum of 1,000 alphanumeric characters. To be a clickable link, the entry must start with http://, https://, or mailto:. For example:</p> <p>http://example.com/mouse1.html</p> <p>For more information concerning the location of related information URLs, see the information concerning Image Location (Designing Service Catalog Images and URLs on page 29).</p>
Price	<p>(Optional) Cost of the service item. Do not include signs or symbols. For example:</p> <p>14.95</p>
Provider	<p>(Optional) Service provider for the service item. For example, if you are ordering a Logitech mouse directly from Logitech, enter:</p> <p>Logitech</p> <p>For example, if you are ordering a Logitech mouse from Best Buy, enter:</p> <p>Best Buy</p>

Table 4-3. Service item attribute fields (page 3 of 5)

Service Item Attribute	Description
Time Estimate	<p>(Optional) Estimated amount of time to satisfy the request for this service item. Time Estimate and Estimate Units together form the estimated amount of time required to satisfy a service item. Time Estimate sets a number, such as 7. Estimate Units sets the duration of time, such as DAYS. For example:</p> <p>7</p>
Estimate Units	<p>(Optional) Duration of the time estimate. One of the following values:</p> <ul style="list-style-type: none"> • DAYS • HOURS • MINUTES <p>Time Estimate and Estimate Units together form the estimated amount of time required to satisfy a service item. Time Estimate sets a number, such as 7. Estimate Units sets the duration of time. For example:</p> <p>DAYS</p>
Max Order Quantity	<p>(Required) Maximum number of service items an user can order with a single request. A number. If Max Order Quantity is set to zero, the service item can be viewed by not ordered. For example:</p> <p>20</p>
Show on Checkout	<p>(Required) Yes or No. Sets if the service item is displayed as part of checkout.</p> <p>Show on Checkout = Y will always show the request.</p> <p>Show on Checkout = N will not show the request unless there are required fields that still need to be filled in after token mapping. This is useful when including standard extras for a service item. For example, you might want to include a specific brand/model USB mouse to all laptop computers, but you do not want to display the mouse each time a laptop is ordered by an user.</p> <p>For example:</p> <p>N</p>

Table 4-3. Service item attribute fields (page 4 of 5)

Service Item Attribute	Description
Request Type	<p>(Optional) Name of the default request type for this service item. Leave this cell empty to default to the catalog or category service request type. For example:</p> <p>Service HW Request Type</p> <p>Note that if Request Type is left blank, the service item Request Type is filled-in by the appropriate category Default Request Type. If the category Default Request Type is left blank, the service item Request Type is filled-in by the catalog Default Request Type.</p>
Org Unit Restrictions	<p>(Optional) List of organization unit names. The user must be a member of one of the listed organization units to see this service item. Leave this attribute empty for all users to access. Enter the term none in Org Unit Restrictions or Security Group Restrictions to deny access to all users. For example:</p> <p>Americas:Europe:Asia</p>
Security Group Restrictions	<p>(Optional) List of security groups names. The user must be a member of one of the listed security groups to see this service item. Leave this attribute empty for all users to access. Enter the term none in Org Unit Restrictions or Security Group Restrictions to deny access to all users. For example:</p> <p>Dev Sec Grp:Finance Sec Grp</p>
Required Bundled Items	<p>(Optional) Assumes this is the parent service item. Enter the Item Identifier for all of the required bundled (children) service items. Required bundled service items cannot be removed by the user. For example:</p> <p>Mouse_Opt_01:Win_NT_OS</p> <p>Note that bundled (children) service items must appear in the Microsoft Excel spreadsheet before the parent service item.</p>

Table 4-3. Service item attribute fields (page 5 of 5)

Service Item Attribute	Description
Optional Bundled Items	(Optional) Assumes this is the parent service item. Enter the Item Identifier for all of the optional bundled (children) service items. Optional bundled service items can be removed by the user. For example: Mouse_Opt_01:Win_NT_OS Note that bundled (children) service items must appear in the Microsoft Excel spreadsheet before the parent service item.
Custom User Data Column Head. The token name of the corresponding user data field is included in the spreadsheet's header field. For example: SKU Number	(Optional) Service Catalog allows for added user data fields to be added to catalogs. For example: S988782747

Installing the Microsoft Excel Add-in File

Before installing the Microsoft Excel Add-in file for Service Catalog, the following prerequisites must be met:

- Mercury IT Governance Center 6.0 Service Pack 13 or later must be installed on your Mercury IT Governance Server.
- Microsoft Excel 2003 must be installed on your workstation.

Installing the Microsoft Excel Add-in file for Service Catalog on your workstation requires the following two-step process:

1. Download the Microsoft Excel Add-in file for Service Catalog.
2. Install the Microsoft Excel Add-in file for Service Catalog.

Downloading the Microsoft Excel Add-in File for Service Catalog

The Microsoft Excel Add-in file for Service Catalog can be downloaded onto your workstation from the Mercury IT Governance Center instance. The Service Catalog is only visible to users with the Service Catalog, Manage Service Catalogs access grant.

To download the Microsoft Excel Add-in file for Service Catalog:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Manage Service Catalog > Download Microsoft Excel Plugin**.

The File Download window opens.

3. In the File Download window, click **Save**.

The Save As window opens.

4. Browse the Save As window and save the Microsoft Excel Service Catalog macro to your workstation.

The Microsoft Excel Add-in file for Service Catalog (SRCXMLGenerator.xla) is saved to your workstation.



Note

In some cases, your browser will save the SRCXMLGenerator.xla file as SRCXMLGenerator.xls. If this happens, rename the file SRCXMLGenerator.xla.

Installing the Microsoft Excel Add-in File for Service Catalog

To install the Microsoft Excel Add-in file for Service Catalog:

1. On your workstation, open Microsoft Excel 2003.
2. From the **Microsoft Excel** menu, select **Tools > Add-Ins**.

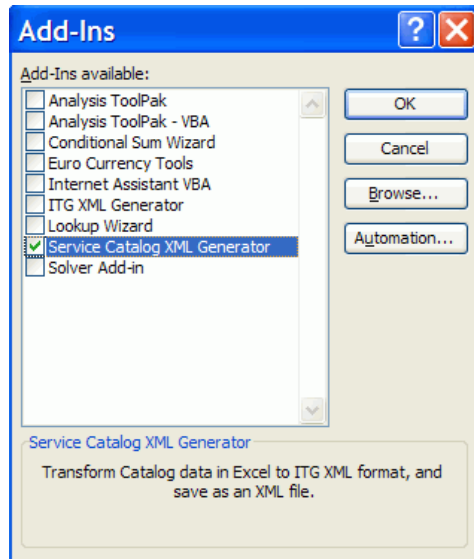
The Add-Ins window opens.

3. In the Add-Ins window, click **Browse**.

The Browse window opens.

- Browse for and select the `SRCXMLGenerator.xla` file.

The Service Catalog XML Generator entry appears in **Add-Ins available**.

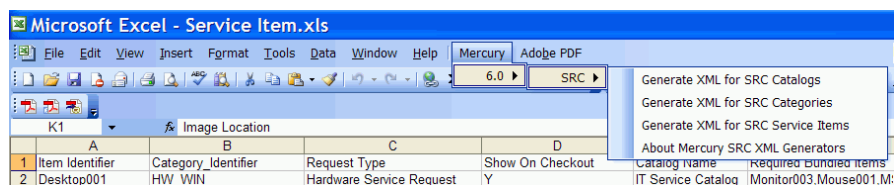


- From the Add-Ins window, select **Service Catalog XML Generator** and click **OK**.

The **Mercury** menu item is added to the Microsoft Excel menu.

- Select the **Mercury** menu item.

A list of **Mercury** menu items is displayed.



Converting Spreadsheets into XML Files

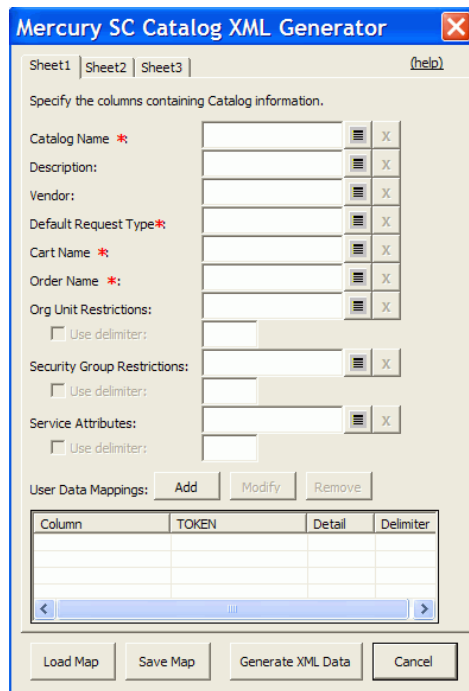
You must convert each of the three Service Catalog spreadsheets separately.

Converting the Catalog Spreadsheet into an XML File

To convert a catalog spreadsheet into an XML file:

1. Open Microsoft Excel.
2. Open the catalog spreadsheet.
3. From the **Microsoft Excel** menu, select **Mercury > 6.0 > Generate XML for SRC Catalogs**.

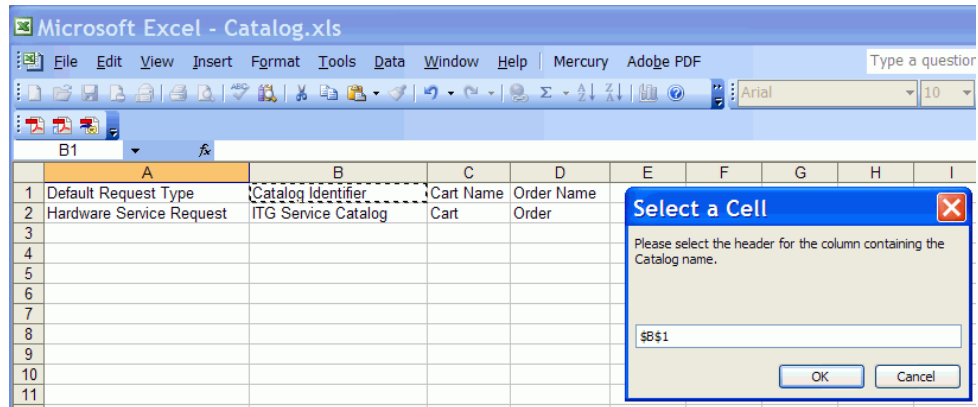
The Mercury SC Catalog XML Generator window opens. Fields with a red asterisk are required fields.



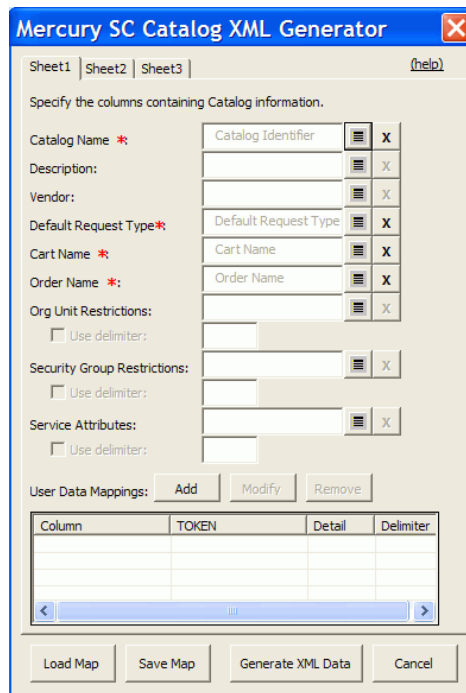
4. In the Mercury SC Catalog XML Generator window, in **Catalog Name**, click the **Field** icon.

The Select a Cell dialog box opens.

- On the spreadsheet, highlight the **Catalog Identifier** header and click **OK** in the Select a Cell dialog box.



The name of the catalog is added to the Mercury SC Catalog XML Generator window. Additional spreadsheet columns might automatically be mapped to the fields of the Mercury SC Catalog XML Generator window.



- Map any remaining spreadsheet columns to the fields in the Mercury SC Catalog XML Generator window by clicking the **Field** icon and completing the Select a Cell dialog box.

7. Generate the XML data file:

- Click **Generate XML Data** to generate the XML data file.
- Click **Save Map** to save the spreadsheet mapping.
- Click **Load Map** to load an existing spreadsheet mapping.
- Click **Cancel** to exit the Mercury SC Catalog XML Generator window.

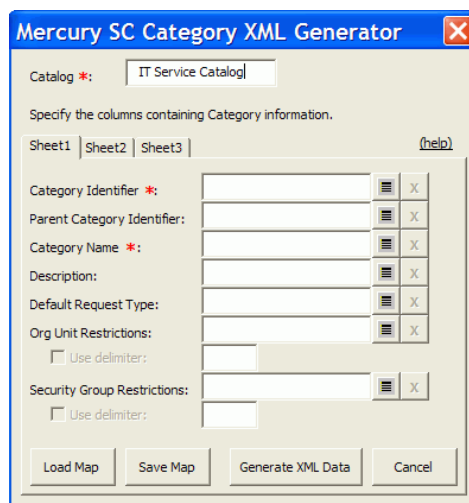
Converting Category Spreadsheets into XML Files

To convert a category spreadsheet into an XML file:

1. Open Microsoft Excel.
2. Open one of the category spreadsheets.
3. From the **Microsoft Excel** menu, select **Mercury > 6.0 > Generate XML for SRC Categories**.

The Mercury SC Categories XML Generator window opens. Fields with a red asterisk are required fields.

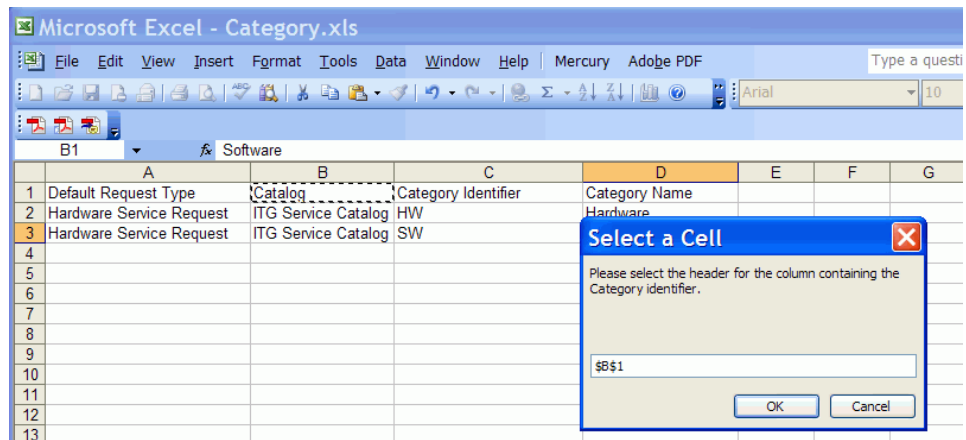
4. In the Mercury SC Categories XML Generator window, type the name of the catalog in **Catalog**.



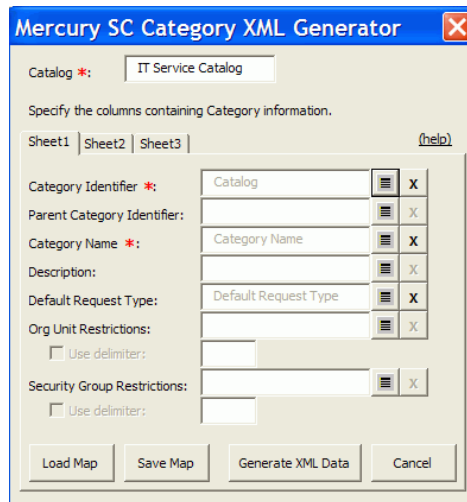
5. In **Category Identifier**, click the **Field** icon.

The Select a Cell dialog box opens.

6. On the spreadsheet, highlight the **Category Identifier** header and click **OK** in the Select a Cell dialog box.



The heading of the **Category Identifier** column is added to the Mercury SC Categories XML Generator window. Additional spreadsheet columns might also be automatically mapped to the fields of the Mercury SC Categories XML Generator window.



7. Map any remaining spreadsheet columns to the fields in the Mercury SC Categories XML Generator window by clicking the **Field** icon and completing the Select a Cell dialog box.

8. Generate the XML data file:

- Click **Generate XML Data** to generate the XML data file.
- Click **Save Map** to save the spreadsheet mapping.
- Click **Load Map** to load an existing spreadsheet mapping.
- Click **Cancel** to exit the Mercury SC Category XML Generator window.

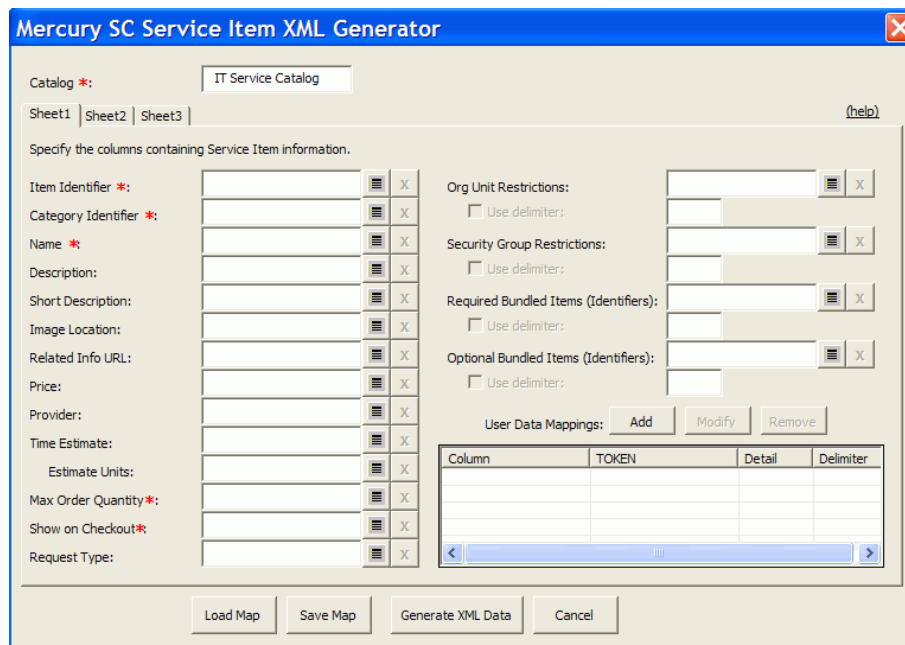
Converting Service Item Spreadsheets into XML Files

To convert a service item spreadsheet into an XML file:

1. Open Microsoft Excel.
2. Open a service item spreadsheet.
3. From the **Microsoft Excel** menu, select **Mercury > 6.0 > Generate XML for SRC Service Items**.

The Mercury SC Service Items XML Generator window opens. Fields with a red asterisk are required fields.

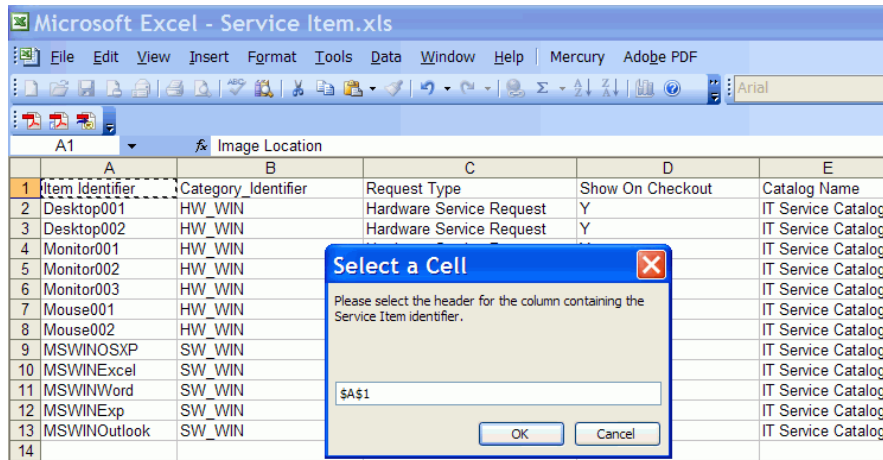
4. In the Mercury SC Service Items XML Generator window, type the name of the catalog in **Catalog**.



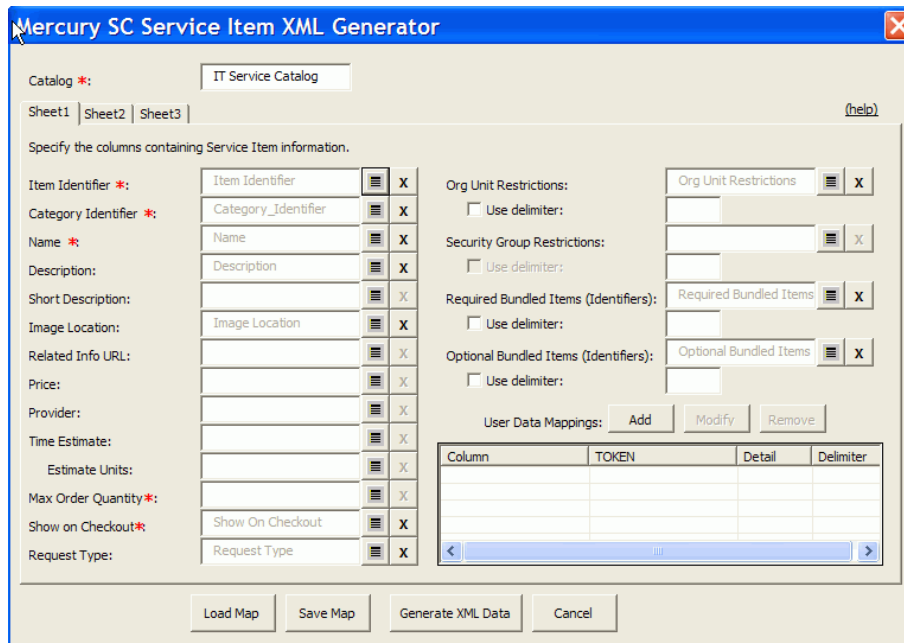
5. In **Item Identifier**, click the **Field** icon.

The Select a Cell dialog box opens.

6. On the spreadsheet, highlight the **Item Identifier** header and click **OK** in the Select a Cell dialog box.



The heading of the **Item Identifier** column is added to the Mercury SC Service Item XML Generator window. Additional spreadsheet columns might also be automatically mapped to the fields of the Mercury SC Service Item XML Generator window.



7. Map any remaining spreadsheet columns to the fields in the Mercury SC Service Item XML Generator window by clicking the **Field** icon and completing the Select a Cell dialog box.
8. Generate the XML data file:
 - Click **Generate XML Data** to generate the XML data file.
 - Click **Save Map** to save the spreadsheet mapping.
 - Click **Load Map** to load an existing spreadsheet mapping.
 - Click **Cancel** to exit the Mercury SC Service Item XML Generator window.

Importing XML Files into Service Catalog

To import XML files into Service Catalog:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Manage Service Catalog > Import SRC Data**.

The Import XML Service Catalog Definitions page opens.

Import XML Service Catalog Definitions

Browse for the XML Catalog, Category, or Service Item definition data file that you wish to import into the Service Catalog.
To import category definitions, please ensure that the parent catalog is already defined in IT Governance Center.
To import service item definitions, please ensure that both the parent catalog and all parent categories are already defined in IT Governance Center.

XML file to import:

Stop process after failures (leave blank for no failure limit).

Importing Categories or Service Items will:

- Create new definitions that do not already exist in the Service Catalog.
- Overwrite existing definitions with those contained in the imported XML data file.
- Remove existing definitions from the Service Catalog which are not contained in the imported XML file.
(Note: these actions will not be committed in Test Mode.)

3. Click **Browse** to locate and select one of the spreadsheet files converted to XML.



Note

Each of the three Service Catalog XML data files must be imported separately.

4. Click **Test** to verify the data.

During the test import, all data is validated for accuracy and correctness without committing the data to an actual import.

- If the test import is successful, import the data.
- If the test import is not successful, go back to [Converting Spreadsheets into XML Files](#) and remap the columns.

5. Click **Import** to import the XML file.

During the import, all data is validated for accuracy and correctness. When the import finishes, a link points to a results page. The results page lists messages or error messages.

Synchronizing Imported XML Data

It is possible to update existing Service Catalog XML data by rerunning the Service Catalog XML Generator on the same entities. The system record with the specified identifier will be updated with the information contained in the new XML file. This means that any kind of update can be performed.

When synchronizing importing categories and service items, you can remove categories or service items in the catalog that are not included in the XML file using the Import XML Service Catalog Definitions page. By selecting the checkbox, **Remove existing definitions from the Service Catalog which are not contained in the imported XML file**, you can synchronize the new spreadsheet (XML file) with the existing database. However, this option should be used with caution. You cannot retrieve old information without a backup of the previous Microsoft Excel spreadsheet file.



Note

You cannot remove existing definitions from the Service Catalog in Test Mode.

Configuring Demand Management

In This Chapter:

- *Overview of Demand Management Entities*
 - *Configuring Requests for Service Catalog*
 - *Configuring Request Header Type Fields*
 - *Configuring Request Header Type, Field Groups Fields*
 - *Configuring Request Type Fields*
 - *Configuring Request Type Fields with Token Mapping*
 - *Configuring Service Catalog Workflows*
 - *Configuring Workflow Steps*
 - *Configuring User Data Fields*
-

Overview of Demand Management Entities

The following lists Mercury Demand Management entities used by Service Catalog:

- Service Catalog requests
 - Service Catalog request types
 - Service Catalog request header types
 - Service Catalog field group
- Service Catalog user data fields
- Service Catalog workflows
- Service Catalog portlet
- Service Catalog token mapping

Configuring Requests for Service Catalog

Requests are a fundamental work unit of Mercury IT Governance Center (see [Figure 5-1](#)). Users create requests and then submit requests along a resolution process, which is defined in the workflow. The request page contains all information typically required to complete a specific business process.

Each request has an associated request type. Request types determine which fields are included in the request and much of the logic associated with the request. Request types obtain their fields from the following sources:

- Request Header Type fields
- Request Header Type, Field Groups fields
- Request Type fields



For complete information concerning request types, see the *Mercury Demand Management Configuration Guide*.

Figure 5-1. Generic Service Catalog request

Configuring Request Header Type Fields

Request header types define the collection of fields that appear under the Header subsection in the Summary section of requests (see [Figure 5-1](#)). Request header types typically include more general information that will be tracked between multiple types of requests. This can include such information as who logged the request, its priority, and a description of the issue.

Every request type must include a request header type. A single request header type can be used for multiple request types. For Service Catalog, the request header type must include the Service Request field group.



Note

For Service Catalog, the request header type must include the Service Request field group. For more information concerning field groups, see [Configuring Request Header Type, Field Groups Fields](#).

For detailed information concerning request header types and configuring request header types, see the *Mercury Demand Management Configuration Guide*.

Configuring Request Header Type, Field Groups Fields

Request header type field groups are a way for Mercury IT Governance Center to distribute a collection of fields required for certain functionality, in this case Service Catalog. Field groups can be found by clicking **Field Groups** in the Request Header Type window (see [Figure 5-2](#)). For Service Catalog, the request header type must include the Service Request field group. Fields of the Service Request field group appear under the Header subsection in the Service Request section of requests.

Field group fields will behave just like normal fields, with the restrictions that you cannot remove them except by removing the entire field group and you might not be able to modify some of the field properties. [Service Catalog Field Group Tokens on page 59](#) lists the field group fields for Service Catalog.



Note

For Service Catalog, the request header type must include the Service Request field group.

For detailed information concerning request header types and configuring request header types, see the *Mercury Demand Management Configuration Guide*.

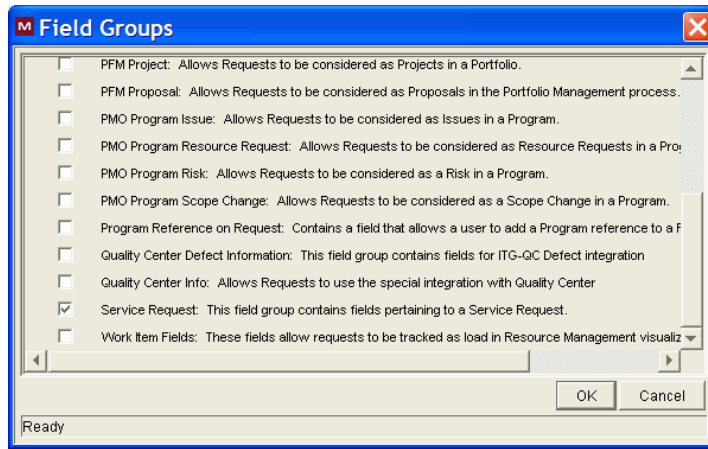


Figure 5-2. Requests and field groups

Service Catalog Field Group Tokens

Service Catalog field group tokens are accessible when using the Token Builder from the Request Type window. Note that the Request Type's associated Request Header Type must include the Service Catalog field group. Service Catalog fields are automatically filled when the request is created.

Table 5-1. Service Catalog field group tokens (page 1 of 2)

Prefix	Tokens	Description
REQ.P	KNTA_SRC_CATALOG_NAME	The catalog name of the service catalog.
REQ.P	KNTA_SRC_ORDER_ID	The order identifier of the service catalog order.
REQ.P	KNTA_SRC_PRICE	The price of the service item.
REQ.P	KNTA_SRC_QUANTITY	The quantity of the service item in the service catalog order.
REQ.P	KNTA_SRC_REQUESTED_FOR	The requestor for of the order.
REQ.P	KNTA_SRC_REQUESTOR	The requestor for the service catalog order.
REQ.P	KNTA_SRC_SEQ	The sequence number of the service item in the service catalog order.

Table 5-1. Service Catalog field group tokens (page 2 of 2)

Prefix	Tokens	Description
REQ.P	KNTA_SRC_SERVICE_ID	The service identifier of the service catalog order.
REQ.P	KNTA_SRC_SERVICE_NAME	The service name of the service item.
REQ.P	KNTA_SRC_TIME_ESTIMATE	The time estimate for the service item in the service catalog order.

Configuring Request Type Fields

Once a request header type is attached to a request type, the fields configured in the request header type are added to the request type. Additional fields and sections can then be configured for the request type. These additional fields will appear under the Header subsection with the fields found in the Summary and Service Request sections (see [Figure 5-2](#)).



Note

For Service Catalog, the request's attached request header type must include the Service Request field group.

For detailed information concerning the configuration of request types, see the *Mercury Demand Management Configuration Guide*.

Configuring Request Type Fields with Token Mapping

This section discusses how to map Service Catalog catalog attributes and service item attributes into the fields of a request. Request fields designated for mapping are typically found in the Field section of the request. To map an attribute to a field in a request requires that the field in the request type be assigned a token in the form of prefix-attribute. The prefixes are as follows:

- SERVICE_<attribute>, where the attribute of a service item attempts to map to a request type field. If mapping occurs, data is retrieved from Service Catalog and entered into the field of the request.
- CATALOG_<attribute>, where the attribute of a catalog attempts to map to a request type field. If mapping occurs, data is retrieved from Service Catalog and entered into the field of the request.

- ORDER_<attribute>, where the user types information into the field of the request. That information is automatically populated to the any subsequent requests that are created for the order.

For example, the prefix SERVICE_ is added to the service item attribute SKU_NUMBER. The token for the request type field is:

SERVICE_SKU_NUMBER

SKU numbers found in the service item tables would be automatically mapped to the request. *Figure 5-3* illustrates how the SERVICE_SKU_NUMBER token is added to a request type.

Prompt	Token	Enabled	Component Type	Validation
Summary				
Service Request				
Request Type Fields				
SKU Number	SERVICE_SKU_NUMBER	Y	Text Field	Text Field - 40
T-Shirt Size	ORDER_TSHIRT_SIZE	Y	Text Field	Text Field - 20

Figure 5-3. Request Type example

When a Service Catalog request is submitted, request type fields having a token with the prefix of SERVICE_ and CATALOG_ automatically loads the matching service item or catalog attribute. For a list of the default Service Catalog tokens, see *Service Catalog Default Attributes on page 63*.

Attributes with the prefix SERVICE_ and CATALOG_ are populated and repopulated each time the user loads or reloads a request within a single order (each time a request is submitted within the order). Tokens with the prefix ORDER_ populate each request in a single order with the same data. Consider the illustration in *Figure 5-4*.

In the request type, the Created By field is assigned the token ORDER_USER_ID. ORDER_USER_ID maps to the attribute USER_ID in the order. When the first request in the order is displayed, the user types the name “Joe” in the field. For each subsequent request in the order, the Created By field equals Joe.

In the same request type, the Price field was assigned the token SERVICE_PRICE. SERVICE_PRICE maps to the service item attribute PRICE. As each request in the order is displayed, the price of the service item is mapped to a Price field of the request.

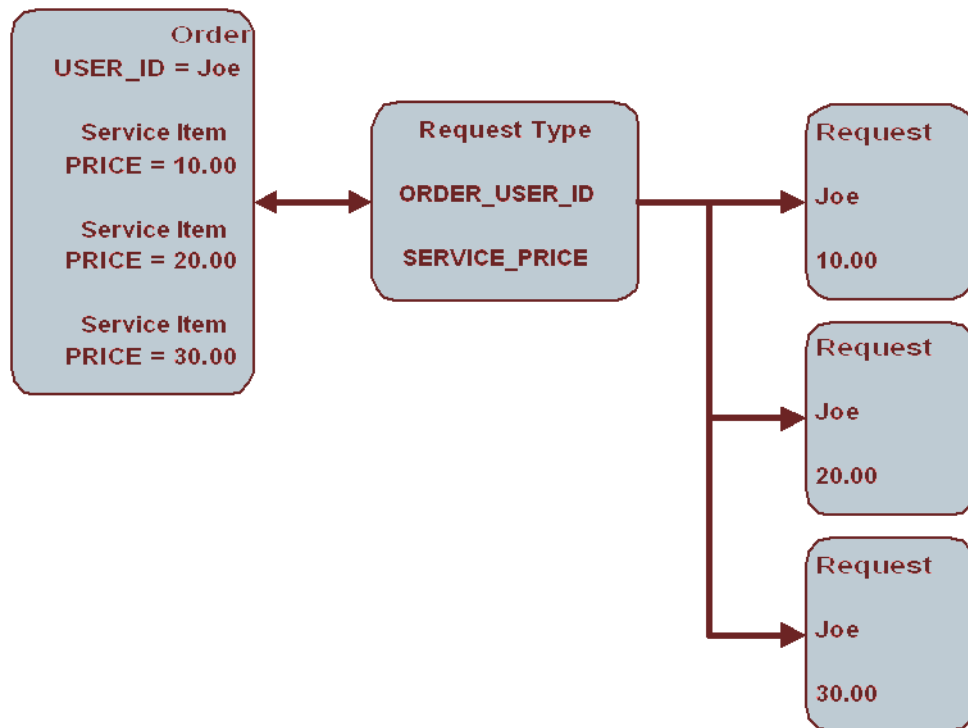


Figure 5-4. Token mapping

Rules Governing Service Catalog Tokens

- Default and user-defined user data field attributes can use the SERVICE_ and CATALOG_ prefixes. For the list of default attributes, see [Service Catalog Default Attributes on page 63](#). For more information concerning user-defined user data fields, see [Configuring User Data Fields on page 68](#).
- User data field attributes can use the ORDER_ prefix.
- Tokens with the SERVICE_ and CATALOG_ prefixes can overwrite information in the request that the user has already typed.
- Tokens with the ORDER_ prefix will not overwrite information typed-in by the user. ORDER_ prefix tokens will only be populated if the request has not been created. This allows the user to fill in different values for these tokens.

- A request field whose token name begins with the prefix ORDER_ is populated based on the last user-entered value for the token, or on a previous request in the current checkout process. The request type field is not be populated when the first request is generated.
- If there are requests that are not shown during the checkout process, and have fields with ORDER_ prefix tokens, all of those fields will get a copy of the last user-entered value for that token, including a blank value. If the token does not exist in any of the requests needing additional details, or if there are no such requests, no value will be copied into those request fields.

Service Catalog Default Attributes

Table 5-2 lists the default catalog attributes that can be used as a token in a request type. *Table 5-3* lists the default service item attributes that can be used as a token in a request type.

Table 5-2. Catalog attributes

Attribute Name	Description
CATALOG_NAME	Name of the catalog.
DESCRIPTION	Description of the catalog.
VENDOR	Vendor providing the catalog.
SERVICE_REQUEST_TYPE_ID	Default request type.
CART_NAME	Name used when referring to the cart.
ORDER_NAME	Name used when referring to the order.
SERVICE_DETAILS_ATTRIBUTES	Service attributes displayed for service items.

Table 5-3. Service item attributes (page 1 of 2)

Attribute Name	Description
SERVICE_ID	Unique alphanumeric identifier for this service item.
SERVICE_NAME	Name of the service item.
DESCRIPTION	Description of the service item.
IMAGE_LOCATION	The URL for the service item image.

Table 5-3. Service item attributes (page 2 of 2)

Attribute Name	Description
RELATED_INFO_LINK	Can be used by the client to display a link to related information about the service item.
SERVICE_PROVIDER	Service provider of the service item.
SERVICE_REQUEST_TYPE_ID	Default request type.
SHOW_ADDITIONAL_DETAILS	Set to Yes/No, show additional details about the service item.
BUNDLED_SERVICES	Other service items related to this service item.
PRICE	Price of the service item.
TIME_ESTIMATE	A number, in minutes, hours, or days for this service item to be fulfilled.
MAX_ORDER_QUANTITY	Maximum number of service items that can be ordered at one time.

Configuring Service Catalog Workflows

A workflow represents a business process and is used to map business rules and processes to an organization (see [Figure 5-5 on page 66](#)).

The following is a list of the basic components of a workflow:

- **Begin.** For each workflow, you must explicitly define the first eligible workflow step.
- **Workflow step.** Workflow steps are events that are linked together to form a complete workflow. The following lists the basic workflow steps:
 - **Decision step.** Decision steps represent manual activities performed outside of Mercury IT Governance Center. For example, a decision step is where a user or group of users approves a request.
 - **Execution step.** Execution steps represent actions that are automated through Mercury IT Governance Center. For example, updating a Web page with the results of a test.

- **Condition step.** Condition steps are logic steps used for complex workflow processing, such as allowing the workflow to proceed only when each of the workflow steps are completed.
- **Subworkflows step.** A subworkflow step represents multiple workflows steps (the subworkflow) in a workflow. For example, a test workflow step in the main workflow represents a series of tests and approvals.
- **Transition.** The results of workflow step that must be communicated to another workflow step. For example, the results of a decision step is Approved and Not Approved.
- **Workflow step security.** Workflow step security determines who has permission to execute or choose a result for a workflow step. For example, for a Approve Request decision step, only the IT project manager can Approve or Not Approved the request.
- **Notification.** Notifications are emails alerts sent out at specific workflow steps. For example, for a Approve Request decision step, an email alert is sent to the product manager.
- **Close step.** Close steps indicate the end of the workflow. The close step is an execution step that marks the request as completed.



Note

For complete instructions on how to configure a workflow, see the *Mercury Demand Management Configuration Guide*.

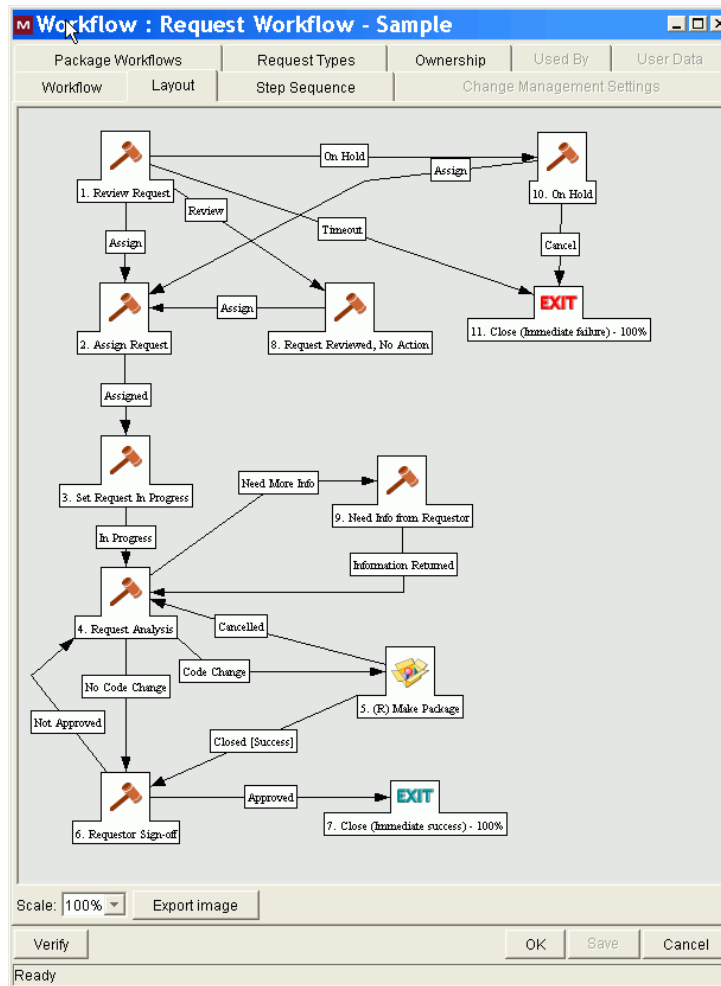


Figure 5-5. Example workflow

Configuring Workflow Steps

Every workflow step can be configured to meet specific business model needs. For example, a workflow step can be configured to notify the responsible parties that a request is in their queue and needs a decision.



Note

For complete instructions on how to configure a workflow, see the *Mercury Demand Management Configuration Guide*.

Figure 5-6. Example Workflow step window

Workflow steps include the following configuration options (see [Figure 5-6](#)):

- **Properties.** General information concerning the workflow step is defined under the **Properties** tab.
- **Security.** Permission settings for specific individuals or groups authorized to act on a workflow step are defined under the **Security** tab.

- **Notifications.** Emails can be sent when a workflow step becomes eligible or after a workflow step is complete. Notifications can inform a user of a task (workflow step) to perform, such as review and approve a new request. Notifications can also inform a group of users of the results of a task. Notifications are defined under the **Notifications** tab.
- **Timeout.** Timeouts determine how long a workflow step can remain inactive before generating an error. Timeouts are defined under the **Timeout** tab.
- **User Data.** Product entities such as packages, workflows, requests and projects include a set of standard fields that provide information about those entities. While these fields are normally sufficient for day to day processing, user data fields provide the ability to capture additional information specific to each organization. User data is defined under the **User Data** tab. If there are no user data fields, the **User Data** tab is disabled.
- **Results.** Each workflow step includes a validation. The **Results** tab lists the validation, the component type and the results.

Configuring User Data Fields

Product entities such as packages, workflows, requests and projects include a set of standard fields that provide information about those entities. While these fields are normally sufficient for day to day processing, user data fields provide the ability to capture additional information specific to each organization or business model. For example, you might want to include a Stock Keeping Unit number (SKU) with every Service Catalog request.

To add a user data field to a request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Open Workbench**.

The Workbench opens.

3. From the shortcut bar, select **Configuration > User Data**.

The User Data Workbench opens.

4. In the User Data Workbench, open the Service Item User Data window.

The Service Item User Data window opens (see [Figure 5-7](#)). The Service Item Data window allows you to configure additional fields across all Service Catalog requests at one time.

5. In the Service Item User Data window, click **New**.

The Field window opens (see [Figure 5-7](#)).

6. Complete the fields in the Field window and click **OK**.

7. The new user data field appears in the Service Item User Data window. The new user data field also appears in all Service Catalog request types under the Header subsection (see [Figure 5-7](#)).



Note

For detailed information concerning the configuration of user data fields, see the *Mercury Demand Management Configuration Guide*.

Figure 5-7. Adding user data fields to a request

To have the user data field appear in the browser page, include the user data field token in the list of tokens specified by Service Attributes. Service Attributes is set in the catalog spreadsheet. For more information on Service Attributes, see [How Service Item Are Displayed on page 27](#).

Mercury Service Catalog Content

In This Chapter:

- *Overview of Mercury Service Catalog Content*
 - *Service Catalog Content Overview*
 - *Service Catalog Content Architecture Diagram*
 - *Service Catalog Content Roles*
- *Installing and Configuring Service Catalog Content*
 - *Prerequisites for Installing Service Catalog Content*
 - *Downloading Service Catalog Content*
 - *Installing Service Catalog Content*
 - *Configuring Service Catalog Content*
 - *Disabling/Removing Service Catalog Content Requests*
 - *Adding New Service Catalog Content Request Types*
 - *Special Notes for Service Catalog Content Maintenance*
 - *Service Catalog Content XML Files*
- *Service Catalog Content Entities*
- *Service Catalog Content Request Types*
 - *SC - Generic SR Header Request Header Type*
 - *SC - Application Access Request Type*
 - *SC - Communication Device Request Type*
 - *SC - Conference Line Request Type*
 - *SC - Hardware Procurement Request Type*
 - *SC - Network Access Request Type*
 - *SC - Phone and Voicemail Request Type*
 - *SC - Software Procurement Request Type*
 - *SC - VPN Access Request Type*
- *Service Catalog Content Service Item User Data*

- *Service Catalog Content Workflows*
 - *Service Catalog Generic Service Request Workflow*
 - *Service Catalog Manager Approval Subworkflow*
 - *Service Catalog Advanced Approval Subworkflow*
 - *Service Catalog Level 1 Approval Subworkflow*
 - *Service Catalog Level 2 Approval Subworkflow*
 - *Service Catalog Level 3 Approval Subworkflow*
 - *Service Catalog Level 4 Approval Subworkflow*
 - *Service Catalog Level 5 Approval Subworkflow*
 - *Service Catalog Fulfillment Subworkflow*
 - *Service Catalog Fulfillment Acceptance Subworkflow*
 - *Service Catalog Requestor Feedback Subworkflow*
- *Service Catalog Content Modules*
 - *SC - Executive Module*
 - *SC - Management Module*
 - *SC - Fulfillment Module*
 - *SC - Requestor Module*
- *Service Catalog Content Portlets*
 - *Open Catalog Requests by Service (last 60 Days) Portlet*
 - *Open Requests by Recipient Department (last 60 Days) Portlet*
 - *Catalog Activity Portlet*
 - *Service Department Activity Portlet*
 - *Satisfactory Feedback by Service Name (last 60 Days) Portlet*
 - *Unsatisfactory Feedback by Service Name (last 60 Days) Portlet*
 - *Satisfactory Feedback by Service Department (last 60 Days) Portlet*
 - *Unsatisfactory Feedback by Service Department (last 60 Days) Portlet*
 - *SLA Exceptions Roll-Up Portlet*
 - *Consolidated Catalog Demand (Past 2 Months, Future 2 Months) Portlet*
 - *Catalog Volume by Status (last 120 Days) Portlet*
 - *Catalog Volume by Service Name (last 120 Days) Portlet*
 - *Catalog Volume by Service Department (last 120 Days) Portlet*
 - *Service Outcome (last 60 Days) Portlet*
 - *Assignment Queue - Prioritized Portlet*
 - *Service Request Pipeline Portlet*
 - *Service Requests in Fulfillment Portlet*
 - *Closed Service Requests (last 60 days) Portlet*
 - *Average Feedback Within Fixed Time Frame Portlet*
 - *Average Feedback Within Rolling Window Portlet*
 - *SC - Count of Requests by Priority Portlet*
 - *My Order Details Portlet*

- *Service Catalog Content Reports*
 - *Service Catalog Requests Report*
 - *Service Catalog Content Database Objects*
 - *Sc_Update_Assigned_To*
 - *Sc_Update_Actual_Delvdte*
 - *Sc_Set_Fulf_Queue_Date*
 - *Sc_Update_Reject_Date*
 - *SC_ED*
 - *SC_FILL_RTNAME*
 - *Sc_Fulfillment_Status*
 - *Sc_Next_Working_Day*
 - *SC_EST_SCH_DATE*
 - *SC_EST_DELV_DATE*
 - *Sc_Fulfillment_Accepted*
 - *Sc_Req_By_Date*
 - *Sc_Update_Escalation_Flag*
 - *Sc_Blank_Authorized_To_Cancel*
 - *Sc_Fulfillment_Rejected*
 - *Sc_Update_Error_Message*
-

Overview of Mercury Service Catalog Content

This chapter provides information to implement the Mercury Service Catalog content. This chapter contains both functional and technical information that outlines all components contained within the system.

This chapter is intended for use by Mercury IT Governance Center system administrators and configurators. To effectively utilize this chapter, readers require basic working knowledge of Mercury IT Governance Center administration and configuration.

Service Catalog Content Overview

The Mercury Service Catalog content is a preconfigured set of requests, workflow, database functions, and modules that provide organizations with an effective way to easily implement and manage standard services (service requests) within Mercury IT Governance Center. The Mercury Service Catalog content contains a configurable front end GUI navigator, standard foundational content, and workflow processes that are commonly supported by IT departments. Each Service contains a set of core reporting and management fields that enable consistent reporting, structure, and management within Mercury IT Governance Center.

The service catalog is maintained using the Service Catalog XML Generator. This tool is used to configure the Catalog, Categories, and Service Items within Microsoft Excel. The tool contains macros that convert the Microsoft Excel data into XML files. The Mercury IT Governance Center front end contains an import utility to load the XML files into the system. This feature makes it easy for service owners to manage aspects of their catalog such as descriptions, pricing, and service configuration settings without requiring access to the Workbench.

In addition, the Service Catalog content deployment contains several preconfigured Mercury-supplied portlets that are available for role based reporting needs. An extract report is also available to filter service catalog data for Microsoft Excel exports.

Service Catalog Content Architecture Diagram

Figure 6-1 illustrates the high level architecture for the Mercury Service Catalog.

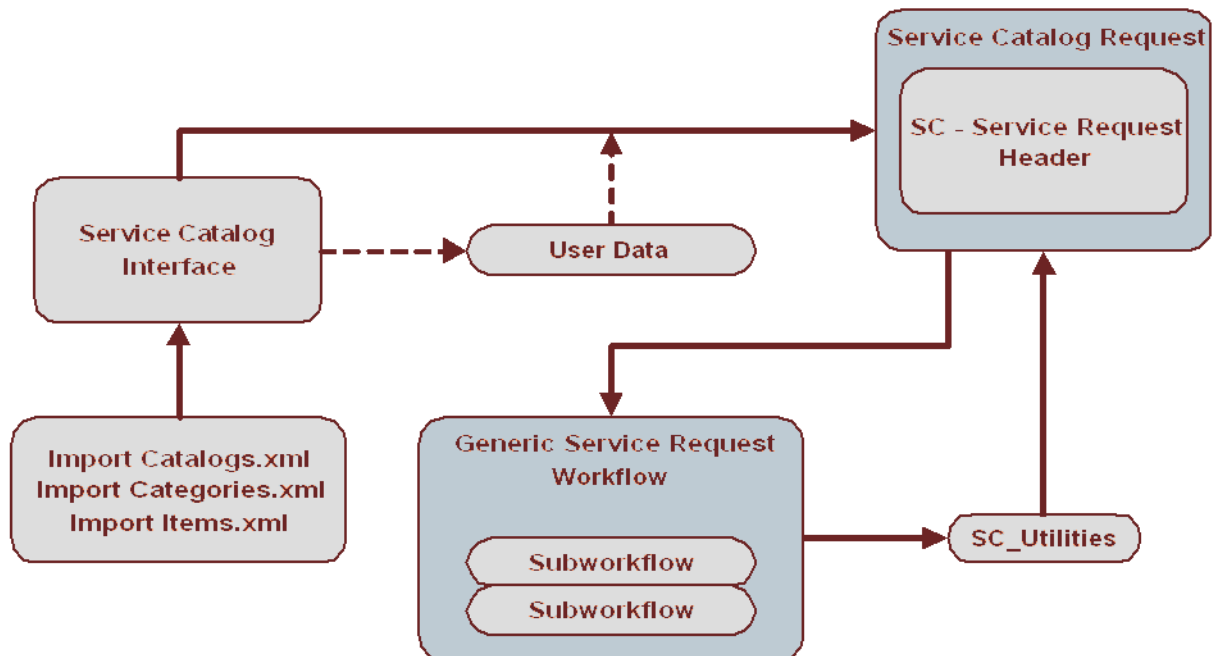


Figure 6-1. Mercury Service Catalog content architecture diagram

The Mercury Service Catalog content architecture consists of the following high-level components:

- Mercury Service Catalog Content Interface/Catalog and Service Item Data.** The Mercury Service Catalog content includes an embedded menu interface, allowing users to browse categorized service items or perform a text based searches for service items. The menu configuration is managed by populating data into Microsoft Excel files. These files are then converted into XML files. The XML files are then loaded into the system using the Import XML Service Catalog Definitions page.
- Service Catalog Content Request Header: SC - Request Header.** This header contains a core set of fields that are required and used by all Service Catalog content request types. The header contains fields that are necessary for workflow processing and consistent reporting. The header should not be changed without carefully assessing the functional and technical impact to the overall Mercury Service Catalog content solution.

- **Service Catalog Content Requests (Request Types).** A single request type can support one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types may be based on the following considerations:
 - The need to capture specific or additional information for a service item. A custom request type for a service.
 - The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.
- **Service Catalog Content Generic Workflow.** The Generic Service Request workflow is used by all Service Catalog content request types. It contains the primary workflow steps. Not all workflow steps are mandatory for every service; service item configuration (through the XML importer) has a direct impact on the workflow path followed by a service item.

The following list contains the primary workflow steps contained in the Service Catalog content generic workflow.

- **Manager Approval.** (Optional, Configurable) Approval for a Service Recipient's Functional Manager.
- **Level 1 Approval.** (Optional, Configurable) Approval for a named level approver once a predetermined financial threshold is reached.
- **Level 2 Approval.** (Optional, Configurable) Approval for a named level approver once a predetermined financial threshold is reached.
- **Level 3 Approval.** (Optional, Configurable) for a named level approver once a predetermined financial threshold is reached.
- **Level 4 Approval.** (Optional, Configurable) for a named level approver once a predetermined financial threshold is reached.
- **Level 5 Approval.** (Optional, Configurable) Approval for a named level approver once a predetermined financial threshold is reached.
- **Fulfillment.** Delivery of goods or services specified within each service request.

- **Fulfillment Acceptance.** (Optional, Configurable) Requestor Approval verification for completed services.
- **Requestor Feedback.** (Optional, Configurable) Indication by requestor of satisfaction levels for completed service.

Figure 6-2 shows a graphical representation of the Generic Service Request Workflow.

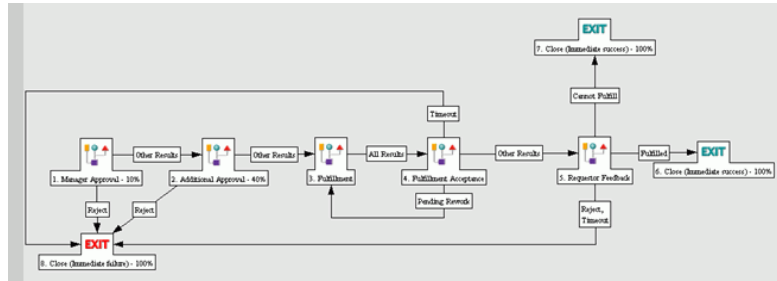


Figure 6-2. Generic Service Request workflow

- **Subworkflows.** The following subworkflows branch off the Generic Service Request Workflow:
 - SC - Advanced Approval
 - SC - Fulfillment
 - SC - Level1 Approval
 - SC - Level2 Approval
 - SC - Level3 Approval
 - SC - Level4 Approval
 - SC - Level5 Approval
 - SC - Manager Approval
 - SC - Requestor Feedback
 - SC - Fulfillment Acceptance
- **SC_Utilities.** SC_Utilities is a package of functions supporting advanced processing such as field updates and calculations between the Service Catalog content generic workflow and all of the Service Catalog content requests.

Service Catalog Content Roles

The following roles play an active role in the defined Service Catalog content process:

- System Owner (SOX Req: PO-4.8 Authorizes all Changes into production)
- Change Manager
- CAB group (Change Advisory Board)
- CAB/EC group (Change Advisory Board - Emergency Committee)
- Change Builder
- Independent Tester
- Applications Development Manager

The CAB or CAB/EC group may consist of the following roles, depending on the change:

- System Owner
- Change Manager
- Customer(s)
- User manager(s)
- Applications Development Manager
- QA Manager
- Operations Manager (e.g. maintainers where appropriate)
- Technical consultants
- Problem Manager
- Service Level Manager
- Customer Relations staff

Installing and Configuring Service Catalog Content

This section details how to install and configure Service Catalog content.

Prerequisites for Installing Service Catalog Content

- Ensure that your current version of Mercury IT Governance Center is 6.0 SP13 or later.
- Back up your database and application server.
- The installation will require usernames and passwords for the following:
 - The database schema associated with the Mercury IT Governance Center installation
 - A Mercury IT Governance Center user account and password. This will be used as the “Created By” User for the imported configurations. The admin user account is sufficient.
- Ensure that the user running this `kDeploy` installation has full permissions (Read, Write, Execute, Delete) to the entire `<ITG_HOME>` directory structure.

Downloading Service Catalog Content

To download Mercury Service Catalog content:

1. Go to the Mercury IT Governance Download Center:

<http://itg.merc-int.com/support/download/login.jsp>

2. Log on using the username and password your company was given when you purchased Service Catalog.
3. Download the installation bundle (`mitg-600-SC15.zip`) from the Mercury IT Governance Download Center.

Installing Service Catalog Content

To install Mercury Service Catalog content:

1. Ensure that your `server.conf` file contains the following parameter, and it is set to the SID for the database that your Mercury IT Governance Center schema is installed in:

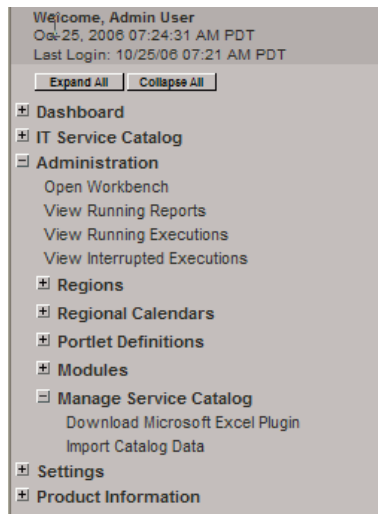
```
com.kintana.core.server.DB_CONNECTION_STRING=<DB_CONNECT_
STRING>
```



Note

If the above parameter is not present, you must add it to the `server.conf` file before you continue with the installation.

2. Unzip `mitg-600-SC15.zip` into a temporary directory.
3. Copy the installation file `mitg-600-SC15.jar` to the `<ITG_HOME>` directory. This is the directory where the Mercury IT Governance Center is installed.
4. Change directory to `<ITG_HOME>/bin`.
5. Run `kDeploy.sh -i mitg-600-SC15.jar`.
6. When the installation is complete STOP and RESTART the Mercury IT Governance Center Server.
7. Log on to Mercury IT Governance Center as admin or using the administrator account.
8. From the menu bar, select **Administration > Manage Service Catalog > Import Catalog Data**.



9. Import the following files (located in the `<ITG_HOME>/transfers` directory) in the following order:

- a. `Catalog_Data.xml`
- b. `Category_Data.xml`
- c. `Service_Items_Data.xml`

Import XML Service Catalog Definitions

Browse for the XML Catalog, Category, or Service Item definition data file that you wish to import into the Service Catalog.
 To import category definitions, please ensure that the parent catalog is already defined in IT Governance Center.
 To import service item definitions, please ensure that both the parent catalog and all parent categories are already defined in IT Governance Center.

XML file to import:

Stop process after failures (leave blank for no failure limit).

Importing Categories or Service Items will:

- Create new definitions that do not already exist in the Service Catalog.
- Overwrite existing definitions with those contained in the imported XML data file.

Remove existing definitions from the Service Catalog which are not contained in the imported XML file.
 (Note: these actions will not be committed in Test Mode.)

For details concerning the XML files, see [Service Catalog Content XML Files](#) on page 86.

Configuring Service Catalog Content

After installing the Mercury Service Catalog content, several steps must be followed to tailor the Service Catalog content for specific organizational use.

1. Determine which service items and request types included in the installation will be used.
2. Review the default Catalog Categorization structure. Define a new catalog taxonomy as appropriate.
3. Modify default Catalog Categories and Catalog Items as needed using the Mercury Service Catalog content spreadsheets included in the deployment package.
4. Disable any request types that are not needed. (See [Disabling/Removing Service Catalog Content Requests](#).)
5. Review the fields provided within the Details sections of the service request types and apply changes as needed. Additional fields and validations may be added, modified, or removed within the Details section without corrupting the functionality of the Mercury Service Catalog content.
6. Review the default text contained in the workflow notifications. Notifications are sent when any of the following events occur:
 - A request is rejected or cannot be fulfilled
 - A request requires manager approval
 - A request is escalated
 - A request requires additional information
7. Identify the individuals or entities responsible for the following roles for each active service item:
 - Service Owner
 - Fulfillment Owner
 - Service Department
 - Service Contact
 - Level 1 Approver (optional)

- Level 2 Approver (optional)
- Level 3 Approver (optional)
- Level 4 Approver (optional)
- Level 5 Approver (optional)
- Escalation Owner

8. Define the following configuration information for each active service item (new or existing).

ITEM_ID	CATEGORY_ID
SERVICE_ITEM_NAME	DESCRIPTION
SHORT_DESCRIPTION	IMAGE_LOCATION
SERVICE_REQUEST_TYPE_NAME	RELATED_INFO_URL
SERVICE_PROVIDER	SHOW_ON_CHECKOUT_FLAG
PRICE	TIME_ESTIMATE
TIME_ESTIMATE_TYPE_CODE	MAX_ORDER_QUANTITY
ORDER_SEQ	REQUIRED_BUNDLED_ITEMS
OPTIONAL_BUNDLED_ITEMS	ACTION
DEPARTMENT_CODE	SERVICE_OWNER
SC_SERVICE_CONTACT	DELIVERY_INFO_NOTE
SERVICE_INSTRUCTIONS	SERVICE_DESCRIPTION
WORKLOAD	WORKLOAD_CATEGORY
SKILL	MGR_APPROVAL_REQUIRED
FULFILLMENT_OWNER	ESCALATION_OWNER
LEVEL_1_APPROVER	LEVEL_1_THRESHOLD
LEVEL_2_APPROVER	LEVEL_2_THRESHOLD
LEVEL_3_APPROVER	LEVEL_3_THRESHOLD
LEVEL_4_APPROVER	LEVEL_4_THRESHOLD
LEVEL_5_APPROVER	LEVEL_5_THRESHOLD
FULFILLMENT_ACCEPT	REQUIRE_FEEDBACK
FEEDBACK_FREQUENCY	DURATION_LOW
DURATION_EFFORT_LOW	COST_LOW
DURATION_NORMAL	DURATION_EFFORT_NORMAL

COST_NORMAL	DURATION_HIGH
DURATION_EFFORT_HIGH	COST_HIGH
DURATION_CRITICAL	DUR_EFFORT_CRITICAL
COST_CRITICAL	

9. Update the line items in the Service Catalog Items import spreadsheet.
10. Convert the Catalog Import spreadsheets to the XML format by using the Mercury Service Catalog Add In for Microsoft Excel.
11. Import the XML files.
12. Grant access to users to request types (if required).
 - Defined per customer installation.
13. Publish portlet and modules to users.
 - Defined per customer installation.

Disabling/Removing Service Catalog Content Requests

To disable or remove a defined service request:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Open Workbench**.

The Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.

The Request Types Workbench opens.
4. Open the request type and select **No** on Enabled.
5. Be sure to remove any references to the request type within the Service Catalog Import Spreadsheets.
6. Remove the request type from any filters within impacted modules or portlets in which the disabled request is used. (Note: Skip this step if data exists for the request and legacy data should still appear in existing portlets.)

7. Convert the spreadsheets to the XML format and re-import.
8. Redistribute any impacted portlet pages or modules if necessary.

Adding New Service Catalog Content Request Types

To add a new defined service request type:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Administration > Open Workbench**.
The Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
The Request Types Workbench opens.
4. Copy an existing request type.
5. Save the request with a new name, preferably prefixed with “SC - “.
6. Set user access if necessary.
7. Save the request.
8. Add, modify, and/or delete fields from the Details section as needed.
9. Setup the appropriate status dependencies for the fields in the Details section.
10. Determine the Catalog Items that will map to the request type.
11. Provide references between service items and the new request type as appropriate using the service items Import Spreadsheet.
12. Convert the spreadsheet to the XML format and re-import.
13. Test the service items.
14. Edit impacted modules.
 - Set the request type filters to include the new request type for any portlet that should contain request data.
15. Redistribute the modules as needed.

Special Notes for Service Catalog Content Maintenance

The following notes should be considered when building service catalogs.

1. Create a well planned catalog taxonomy. Organization of the catalog is critical to ensure users can easily locate desired services.
2. Provide easy to understand service names.
3. Provide clear instructions and service information for each service item.
4. Service Item Spreadsheet: If an Item references another Item that does not exist in the Catalog, such as when you specify bundled or optional items, be sure the newly referenced Item is located above the row that is identifying the reference. Otherwise, you might be referencing an Item Id that does not exist in the database yet. As an example, suppose Item A has optional Items B, C, and D, the import spreadsheet should be sequentially structured as follows:
 - a. Item B
 - b. Item C
 - c. Item D
 - d. Item A
5. The example in previous point applies to Catalog Category references as well.
6. Set the normal service cost to be equal to the PRICE for each item. This will ensure consistency between the service cost displayed in the catalog front end and the default back end request price.

Service Catalog Content XML Files

The Service Catalog content out-of-the-box configurations show how the following XML files are configured:

- `Catalog_Data.xml`
- `Category_Data.xml`
- `Service_Items_Data.xml`

Catalog_Data.xml Detail

Table 6-1. Category_Data.xml details

CATALOG_NAME	DESCRIPTION	CART_NAME	ORDER_NAME
IT Service Catalog	Parent Catalog	Cart	Order

Category_Data.xml Detail

Table 6-2. Category_Data.xml details

CATEGORY_ID	SERVICE_CATALOG_NAME	PARENT_CATEGORY_ID	SERVICE_CATEGORY_NAME	DESCRIPTION
COMP_EQUIP	IT Service Catalog		Computer Equipment	Computer Equipment
SOFTWARE	IT Service Catalog		Software	Software
TELECOM	IT Service Catalog		Telecom	Telecom
ACCTS_ACCESS	IT Service Catalog		Accounts and Access	Accounts and Access
SUPPORT	IT Service Catalog		Support	IT Support Services
LAPTOPS	IT Service Catalog	COMP_EQUIP	Laptops	Laptop Equipment
DESKTOPS	IT Service Catalog	COMP_EQUIP	Desktops	Desktop Equipment
ACCESSORIES	IT Service Catalog	COMP_EQUIP	Accessories	Computer Accessories
LAPTOP_BAGS	IT Service Catalog	ACCESSORIES	Laptop Bags	Laptop Bags
CABLES	IT Service Catalog	ACCESSORIES	Cables	Cables and Connectors
PORTABLE_STORAGE	IT Service Catalog	ACCESSORIES	Portable Storage	Portable Storage Devices

Service_Item_Data.xml Detail

Table 6-3. Service_Item_Data.xml detail (page 1 of 3)

ITEM_ID	CATEGORY_ID	SERVICE_ITEM_NAME	DESCRIPTION	SERVICE_REQUEST_TYPE_NAME
SC - Network Access	ACCTS_ACCESS	Network Access	Network Access	SC - Network Access
SC - VPN Access	ACCTS_ACCESS	VPN Access	VPN Access	SC - VPN Access
SC - Application Access	ACCTS_ACCESS	Application Access	Application Access	SC - Application Access

Table 6-3. Service_Item_Data.xml detail (page 2 of 3)

ITEM_ID	CATEGORY_ID	SERVICE_ITEM_NAME	DESCRIPTION	SERVICE_REQUEST_TYPE_NAME
SC - Hardware Procurement	COMP_EQUIP	Hardware	Hardware	SC - Hardware Procurement
SC - Software Procurement	SOFTWARE	Desktop Applications	Desktop Applications	SC - Software Procurement
Lan Cable - 10 ft.	CABLES	Lan Cable - 10 ft.	Lan Cable - 10 ft.	SC - Hardware Procurement
Laptop Lockdown Kit	ACCESSORIES	Laptop Lockdown Kit	Laptop Lockdown Kit	SC - Hardware Procurement
Mouse – USB	ACCESSORIES	Mouse - USB	Mouse - USB	SC - Hardware Procurement
MS Office Package	SOFTWARE	MS Office Package	MS Office Package	SC - Software Procurement
Laptop Bag – Canvas	LAPTOP_BAGS	Laptop Bag - Canvas	Laptop Bag - Canvas	SC - Hardware Procurement
SC - Communications Device	TELECOM	Communications Device	Communications Device	SC - Communications Device
SC - Phone and Voicemail	TELECOM	Phone and Voicemail	Phone and Voicemail	SC - Phone and Voicemail
SC - Conference Line	TELECOM	Conference Line	Conference Line	SC - Conference Line
Laptop - Model 1	LAPTOPS	Laptop - Model 1	Laptop - Model 1. Basic Laptop Model X200	SC - Hardware Procurement
Laptop - Model 2	LAPTOPS	Laptop - Model 2	Laptop - Model 2 Advanced Laptop Model X500	SC - Hardware Procurement
Laptop Bag – Leather	LAPTOP_BAGS	Laptop Bag - Leather	Laptop Bag - Leather	SC - Hardware Procurement
Lan Cable - 6 ft.	CABLES	Lan Cable - 6 ft.	Lan Cable - 6 ft.	SC - Hardware Procurement
Lan Cable - 20 ft.	CABLES	Lan Cable - 20 ft.	Lan Cable - 20 ft.	SC - Hardware Procurement
Jump Drive 256MB	PORTABLE_STORAGE	Jump Drive 256MB	Jump Drive 256MB	SC - Hardware Procurement
Jump Drive 1GB	PORTABLE_STORAGE	Jump Drive 1GB	Jump Drive 1GB	SC - Hardware Procurement
Jump Drive 500MB	PORTABLE_STORAGE	Jump Drive 500MB	Jump Drive 500MB	SC - Hardware Procurement
PC Lockdown Kit	ACCESSORIES	PC Lockdown Kit	PC Lockdown Kit	SC - Hardware Procurement
PC – Standard	DESKTOPS	PC - Standard	PC - Standard	SC - Hardware Procurement

Table 6-3. Service_Item_Data.xml detail (page 3 of 3)

ITEM_ID	CATEGORY_ID	SERVICE_ITEM_NAME	DESCRIPTION	SERVICE_REQUEST_TYPE_NAME
PC – Deluxe	DESKTOPS	PC - Deluxe	PC - Deluxe	SC - Hardware Procurement
MS Access	SOFTWARE	MS Access	MS Access	SC - Software Procurement
MS Excel	SOFTWARE	MS Excel	MS Excel	SC - Software Procurement
MS Powerpoint	SOFTWARE	MS Powerpoint	MS Powerpoint	SC - Software Procurement
MS Visio	SOFTWARE	MS Visio	MS Visio	SC - Software Procurement
MS Project	SOFTWARE	MS Project	MS Project	SC - Software Procurement
MS Frontpage	SOFTWARE	MS Frontpage	MS Frontpage	SC - Software Procurement
MS Word	SOFTWARE	MS Word	MS Word	SC - Software Procurement
Laptop Bundle – Standard	LAPTOPS	Laptop Bundle - Standard	Laptop Bundle - Standard	SC - Hardware Procurement
Laptop Bundle – Deluxe	LAPTOPS	Laptop Bundle - Deluxe	Laptop Bundle - Deluxe	SC - Hardware Procurement

Service Catalog Content Entities

The remaining sections of this chapter detail the Mercury Service Catalog content entities. These entities include:

- Service Catalog content request types
- Service Catalog content service item user data
- Service Catalog content workflows
- Service Catalog content modules
- Service Catalog content portlets
- Service Catalog content reports
- Service Catalog content database objects

Service Catalog Content Request Types

This section provides the specifications for the key screen (forms/request types) that are required to support the Mercury Service Catalog content. *Figure 6-3* shows a Service Catalog content request.

The following lists the Service Catalog content request types. Multiple service items can map to a single Service Catalog content request type.

- SC - Application Access
- SC - Communications Device
- SC - Conference Line
- SC - Hardware Procurement
- SC - Network Access
- SC - Phone and Voicemail
- SC - Software Procurement
- SC - VPN Access

Table 6-4 lists the fields found within the Service Catalog content request types.

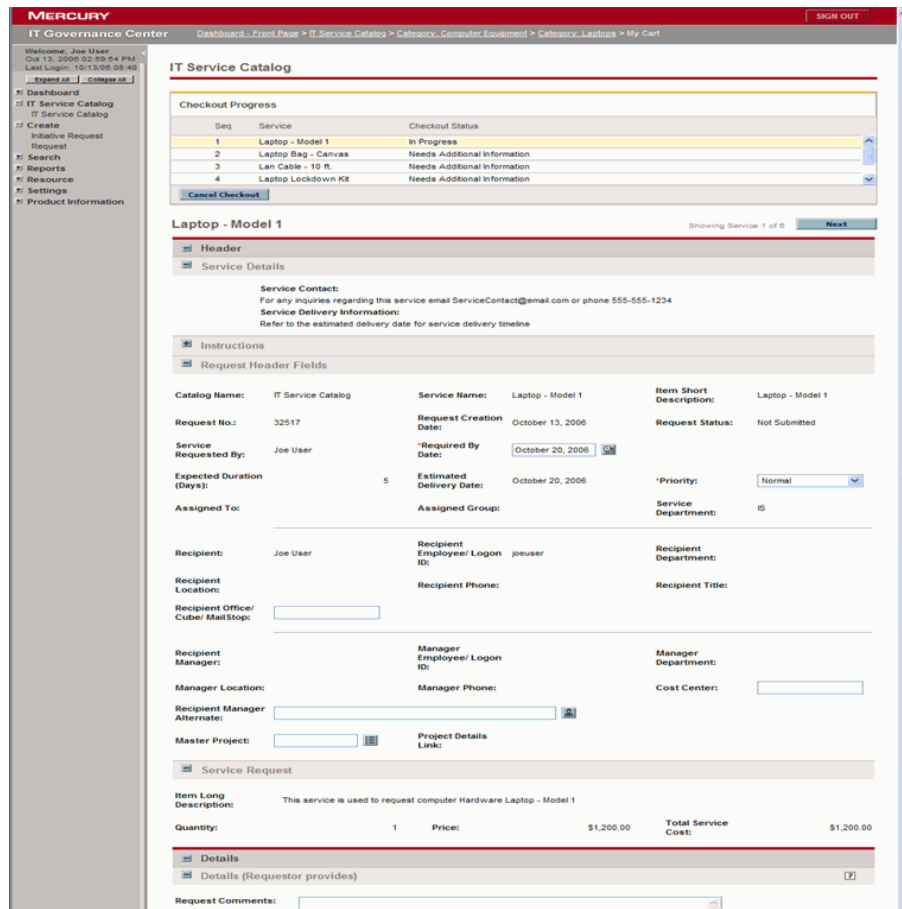


Figure 6-3. Service Catalog content request

Table 6-4. Service Catalog content request type fields (page 1 of 5)

Field Name	Description	Source
Service Delivery Information	Field used to display catalog user data.	Service Data
Service Description	Field used to display catalog user data.	Service Data
Instructions	Field used to display catalog user data.	Service Data
Catalog Name	Displays the Catalog Name the request item was selected from.	Catalog Data
Service Name	Displays the Service Name for the current item.	Catalog Data
Item Short Description	Displays the catalog user data for the Item Short Description	Service Data
Request No.	Field used to uniquely identify the record. The value is system generated.	Request Data
Request Creation Date	The date the request was created.	Request Data

Table 6-4. Service Catalog content request type fields (page 2 of 5)

Field Name	Description	Source
Request Status	The current status of the request.	Request Data
Service Request By	The user name of the person who created the request.	Request Data
Required By Date	The date the request is due (user selected)	Request Data
Expected Duration (Days)	The expected number of days to fulfill the service. The value is populated from the corresponding Service Item User Data. The priority of the request determines the expected duration.	Request Data
Estimated Delivery Date	The estimated completion date of the request.	Request Data
Priority	Used to select service priority of the request. {Normal, Low, High, Critical}	Request Data
Assigned To	The user who is required to take action on the request at a given point in time. The value is set within the Service Request Workflow.	Request Data
Assigned Group	The name of a user security group to take action on the request.	Request Data
Service Department	The department name that is responsible for the service.	Service Data
Recipient	The recipient of the service.	Catalog Data
Recipient Employee/Logon ID	The user id or logon id for the recipient.	Resource Data
Recipient Department	The recipient department.	Resource Data
Recipient Location	The recipient location.	Resource Data
Recipient Office/ Cube/ Mailstop	The mail stop for the Recipient. The value is manually entered by the Requestor.	Request Data
Recipient Title	The Recipient's title.	Resource Data
Recipient Phone	The recipient phone number.	Resource Data
Cost Center	The recipient cost center.	Request Data
Recipient Manager	The manager of the recipient.	Resource Data
Manager Location	The location of the Recipient Manager.	Resource Data
Manager Department	The Recipient Manager Department.	Resource Data
Recipient Manage Alternate	Alternate user to act on Manager approval steps.	Request Data
Master Project	A master project plan may be selected to associate the request with. This is for informational purposes only.	Request Data
Project Details Link	A link to the Master Project.	Request Data
Item Long Description	The long description of the service item.	Service Data
Additional Cost Description	A description for additional service costs. This value is entered during fulfillment.	Request Data
Additional Cost	The additional cost in USD.	Request Data
Quantity	Item quantity.	Catalog Data

Table 6-4. Service Catalog content request type fields (page 3 of 5)

Field Name	Description	Source
Price	The price of the service item	Service Data
Total Service Cost	Calculated total cost of service (Price*Qty)+Additional Cost.	Request Data
Service Owner	The owner of the service.	Service Data
Fulfillment Owner	The user responsible for fulfillment.	Service Data
Action	Flag used to indicate service type (Add, Update, Remove)	Service Data
Require Manager Approval	Indication of the service requires manager approval.	Service Data
Escalation Owner	Person responsible to resolve escalation.	Service Data
Service Notes	Service comments.	Request Date
Service Priority	Priority of request while in fulfillment (optional).	Request Data
Fulfillment Queue Date	The date the request enters fulfillment.	Request Data
Scheduled Start Date	The date in which the service will begin fulfillment. The date is initially populated by a rule which reads the Required By Date, subtracts the Expected Duration Days, and checks the valid working days within the current working calendar. If the Required by Date is less than the duration provided by the Expected Duration, the Scheduled Start/Finish date is moved forward to comply with the SLA level.	Request Data
Scheduled Finish Date	The date in which the service will complete fulfillment. The date is initially populated by a rule which reads the Required By Date, subtracts the Expected Duration Days, and checks the valid working days within the current working calendar. If the Required by Date is less than the duration provided by the Expected Duration, the Scheduled Start/Finish date is moved forward to comply with the SLA level.	Request Data
Scheduled Effort (Days)	The scheduled level of effort required to complete the service item.	Request Data
Scheduled Effort (Hours)	The number of hours required to fulfill the request. The value is populated from the corresponding Service Item user data.	Request Data
Actual Start Date	The date in which the service began fulfillment. This value is populated by the fulfillment user.	Request Data
Actual Finish Date	The date in which the service completed fulfillment. This value is populated by the fulfillment user.	Request Data
Actual Effort (Hours)	The actual amount of time required to fulfill the request. This value is entered in fulfillment.	Request Data
Actual Duration (Days)	The actual number of days required to fulfill the frequent. This value is entered in fulfillment.	Request Data
Fulfillment Status	The actual status of the request in fulfillment.	Request Data
Tracking Information	Misc. tracking information.	Request Data
Fulfillment Comments	Text area used to store comments by fulfillment.	Request Data

Table 6-4. Service Catalog content request type fields (page 4 of 5)

Field Name	Description	Source
Requestor Acceptance First Time	Indication if the request was accepted in fulfillment the first time. This field will retain a value of No if the request was first rejected then accepted at a later time.	Request Data
Request Escalated	Indication if the request was ever escalated throughout workflow.	Request Data
Level 1 Approver	(Hidden) User who provides Level 1 approval (if applicable)	Service Data
Level 1 Cost Threshold	(Hidden) The dollar amount in which Level 1 Approval is required.	Service Data
Level 2 Approver	(Hidden) User who provides Level 2 approval (if applicable)	Service Data
Level 2 Cost Threshold	(Hidden) The dollar amount in which Level 2 Approval is required.	Service Data
Level 3 Approver	(Hidden) User who provides Level 3 approval (if applicable)	Service Data
Level 3 Cost Threshold	(Hidden) The dollar amount in which Level 3 Approval is required.	Service Data
Level 4 Approver	(Hidden) User who provides Level 4 approval (if applicable)	Service Data
Level 4 Cost Threshold	(Hidden) The dollar amount in which Level 4 Approval is required.	Service Data
Level 5 Approver	(Hidden) User who provides Level 5 approval (if applicable)	Service Data
Level 5 Cost Threshold	(Hidden) The dollar amount in which Level 5 Approval is required.	Service Data
Application	(Hidden) Not used.	Request Data
Workload Category	(Hidden) Not used.	Service Data
Workflow	(Hidden) The workflow the request will use. All Service Requests use the SC - Generic workflow.	Request Data
Request Type Name	(Hidden) The name of the request. This value is defaulted.	Request Data
Contact Name	(Hidden)	Request Data
Company	(Hidden)	Request Data
Workload?	(Hidden) Indication if the current request will impact user workload.	Service Data
Allow External Update of Actual Effort	(Hidden) Not used.	Request Data
% Complete	(Hidden) Not used.	Request Data
Fulfillment Vendor	The name of a third party vendor that may fulfill the request. This is populated by a fulfillment user.	Request Data
Demand Satisfied Date	The date the request completed fulfillment.	Request Data
Reject Date	(Hidden) The date the request was rejected.	Request Data
Skill	(Hidden) The skill required to fulfill the request.	Service Data

Table 6-4. Service Catalog content request type fields (page 5 of 5)

Field Name	Description	Source
Estimated Start Date	(Hidden) The estimated date fulfillment will begin	Request Data
Request Group	Request group field for the request. The value is set by a rule.	Request Data
Estimated Effort	(Hidden) The number of hours estimated to fulfill the request.	Request Data
Service Satisfied	(Hidden) The date in which fulfillment was completed.	Request Data

SC - Generic SR Header Request Header Type

The SC - Generic SR Header is the request header type used in all Service Requests in the system. The request header type contains the fields that are standard across all Service Catalog content request types. These fields that are necessary for workflow processing and consistent reporting. In addition Demand SLA, Demand Scheduling, and Request Work Item field groups are used within the header, but are hidden. Rules are used to update the Mercury IT Governance Center field groups for reporting purposes.

The SC - Generic SR Header request header type should not be changed without carefully assessing the functional and technical impact to the overall Mercury Service Catalog content solution.

Table 6-5. SC - Generic SR Header fields (page 1 of 8)

Field Name	Description	Type	Validation
SC_SERVICE_CONTACT	Service Contact Heading	Text	Text Field - 200
SERVICE_SC_SERVICE_CONTACT	Service Contact Description	Text	Text Field - 200
SC_DELIVERY_INFORMATION	Service Delivery information Heading	Text	Text Field - 200
SERVICE_DELIVERY_INFO_NOTE	Service Delivery Information Note	Text	Text Field - 300
SERVICE_SERVICE_INSTRUCTIONS	Informational. Provides instructions for the user.	Text	Text Area - 1800
Catalog Name	Name of the Catalog	Text	Text Field - 40
Service Name	Name of the kind of Service being used	Text	Text Field - 40
Item Short Description	Small Description about the service item in use	Text	Text Field - 300

Table 6-5. SC - Generic SR Header fields (page 2 of 8)

Field Name	Description	Type	Validation
Request No.	Field used to uniquely identify the record. The value is system generated.	Text	Text Field - 40
Request Creation Date	The date the request was created. The field is auto populated.	Date	Date
Request Status	The current status of the request. The value is determined by the service request workflow.	Auto-complete	CRT - Request Type Status - All
Service Requested By	The user who created the request.	Auto-complete	KNTA - User Id - Enabled
Required By Date	The date in which the requestor specifies the service must be completed. The value is selected by the requestor.	Date	Date
Required By Date Feasibility	This field contains the message which appears if the user enters an infeasible Required by Date	Text	Text Area - 1800
Expected Duration (Days)	The expected number of days to fulfill the service. The value is populated from the corresponding entry in the Microsoft Excel. The selected Priority is used to query the appropriate value from the setup table.	Numeric	Numeric Text Field
Estimated Delivery Date	The date in which the service should be satisfied per the SLA level	Date	Date
Priority	Used to select service priority of the request. {Normal, Low, High, Critical}	Drop-down List	CRT - Priority - Enabled
Assigned To	The user who is required to take action on the request at a given point in time. The value is set within the Service Request Workflow.	Auto-complete	CRT - Assigned To - Enabled
Assigned Group	A user group who may act on the request at a specific workflow step. This field is set by workflow	Auto-complete	CRT - Assigned Group - Enabled

Table 6-5. SC - Generic SR Header fields (page 3 of 8)

Field Name	Description	Type	Validation
Service Department	The Department that will fulfill the request. This is auto populated from the corresponding entry in the Microsoft Excel	Auto-complete	KNTA - Department - Enabled
SC_HR1	Contains the Line separating a section	Text	Text Field - 200
Recipient	The user who will receive the services. This Recipient is selected by the Service Requestor.	Auto-complete	KNTA - User Id - Enabled
Recipient Employee/ Logon ID	The Mercury IT Governance Center ID of the Recipient.	Text	Text Field - 40
Recipient Department	The Recipient's department. This value is populated from the Mercury IT Governance Center User Profile	Auto-complete	KNTA - Department - Enabled
Recipient Location	The location of the recipient. The value is auto populated from the Mercury IT Governance Center User Profile.	Text	Text Field - 200
Recipient Phone	The phone number for the recipient. The value is populated from the user profile	Text	Telephone Text Field
Recipient Title	The Recipient's title. The value is calculated from the Mercury IT Governance Center User Profile.	Text	Text Field - 200
Recipient Office/ Cube/ MailStop	The mail stop for the Recipient. The value is manually entered by the Requestor.	Text	Text Field - 200
Recipient Role	The role of the recipient. The value is auto populated from the Mercury IT Governance Center User Profile	Auto-complete	KRSC - Skill
SC_HR2	Contains the Line separating a section	Text	Text Field - 200
Recipient Manager	The manager of the recipient. The value is auto populated from the Mercury IT Governance Center User Profile.	Auto-complete	KNTA - User Id - Enabled
Manager Employee/ Logon ID	The Manager's Mercury IT Governance Center ID	Text	Text Field - 200

Table 6-5. SC - Generic SR Header fields (page 4 of 8)

Field Name	Description	Type	Validation
Manager Department	The Recipient Manager Department. This value is populated from the Mercury IT Governance Center User Profile.	Text	Text Field - 200
Manager Location	The location of the Recipient Manager. The value is auto populated from the Mercury IT Governance Center User Profile.	Text	Text Field - 200
Manager Phone	The Manager's phone. The value is populated from the user profile	Text	Telephone Text Field
Cost Center	This field captures any cost center or charge code to be used for the request. It is populated by the Requestor.	Text	Text Field - 200
Recipient Manager Alternate	Allows for the selection of a user to act on manager approval steps for the current request	Auto-complete	KNTA - User Id - Enabled
Master Project	A master project plan may be selected to associate the request with. This is for informational purposes only.	DRV - Master Projects - Enabled	DRV - Master Projects - Enabled
Project Details Link	A reference link for the selected Master Project plan. The link is generated after selecting a Master Project.	URL	URL
Service Priority (Store)	Used to store the service priority of the request. {Normal, Low, High, Critical} used as a hidden field.	Drop-down List	CRT - Priority - Enabled
Estimated Duration (Days)	This has the value same as Expected Duration (days)	Numeric	Numeric Text Field
Item Long Description	This field contains a detailed description of the Service Request. It takes value from the corresponding entry in Microsoft Excel.	Text	Text Field - 200
Additional Cost Description	A short description of the additional cost incurred during the fulfillment stage of the service request process.	Text	Text Field - 200
Additional Cost	This contains some additional cost incurred during the fulfillment stage.	Text	Currency Text Field

Table 6-5. SC - Generic SR Header fields (page 5 of 8)

Field Name	Description	Type	Validation
Quantity	This field takes its value from the Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field
Price	This field gives the price of the service item based on the priority of the service request being made by the requestor.	Text	Currency Text Field - Allow Blank
Total Service Cost	This field gives a final figure of (Price * Quantity) + Additional Cost	Text	Currency Text Field
Sea	This field defines the sequence of the service item	Numeric	Numeric Text Field
Service ID	Defines the system generated Service ID	Numeric	Numeric Text Field
Order ID	Defines the system generated Order ID	Numeric	Numeric Text Field
Delivery Estimate (Days)	This has the value same as Expected Duration (days)	Text	Text Field - 40
Internal Service Cost	This is a hidden field and takes its value directly from corresponding entry in the database.	Text	Currency Text Field
Service Priority	Used to select service priority of the request. {Normal, Low, High, Critical}	Drop-down List	CRT - Priority - Enabled
Fulfillment Queue Date	The date the request enters fulfillment.	Date	Date
Scheduled Start Date	The date in which the service will begin fulfillment. The date is initially populated by a rule which reads the Required By Date, subtracts the Expected Duration Days, and checks the valid working days within the current working calendar. If the Required by Date is less than the duration provided by the Expected Duration, the Scheduled Start date is moved forward to comply with the SLA level.	Date	Date

Table 6-5. SC - Generic SR Header fields (page 6 of 8)

Field Name	Description	Type	Validation
Scheduled Finish Date	The date in which the service is scheduled for completion. The value is initially populated by a rule, but then can be edited by a fulfillment user.	Date	Date
Scheduled Effort (hours)	The number of hours required to fulfill the request. The value is populated from the corresponding entry in Microsoft Excel.	Numeric	Numeric Text Field - 2 decimals
Scheduled Duration (days)	The number of days scheduled to fulfill the request. The value is initially populated by a rule, but then can be edited by a fulfillment user.	Numeric	Numeric Text Field
SC_FUL_HR1	Contains the Line separating a section	Text	Text Field - 200
Actual Start Date	The date in which the service began fulfillment. This value is populated by the fulfillment user.	Date	Date
Actual Finish Date	The date when fulfillment was completed. The value is set by a fulfillment user.	Date	Date
Actual Effort (hours)	Actual number of hours to fulfill the request. The value is entered in by a fulfillment user.	Numeric	Numeric Text Field - 2 decimals
Actual Duration (days)	The actual duration to fulfill the request. This value is manually entered by a fulfillment user	Numeric	Numeric Text Field - 2 decimals
SC_FUL_HR2	Contains the Line separating a section	Text	Text Field - 300
Fulfillment Status	Status field used to identify potential fulfillment outcomes. The value is automatically set from the service request workflow.	Drop-down List	SC - Fulfillment Status
Tracking Information	Field used for tracking information if necessary. The field is entered by fulfillment.	Text	Text Field - 300
Fulfillment Vendor (Communication Device)	Not Used	Drop-down List	SRC - Preferred Wireless Carriers

Table 6-5. SC - Generic SR Header fields (page 7 of 8)

Field Name	Description	Type	Validation
Fulfillment Vendor	The name of a third party vendor that may fulfill the request. This is populated by a fulfillment user.	Text	Text Area
Fulfillment Comments	Text area used to store comments by fulfillment.	Text	Text Area - 1800
Request Escalated	Captures the value if the Request is escalated at any stage of the workflow.	Radio Button	Radio Buttons (Y/N)
Estimated Effort	The number of hours estimated to fulfill the request. The value is defaulted from the corresponding Microsoft Excel entry, but then may be modified by a fulfillment user	Numeric	Numeric Text Field
Estimated Start Date	The estimated date fulfillment will begin	Date	Date
Skill	The skill required to fulfill the request.	Auto-complete	RSC - Skills - Enabled
Workload	Indication if the current request will impact user workload. This value is populated from the corresponding SC - Service Request Setup.	Radio Button	Yes No Radio Buttons
Workload Category	Workload Category comes from the corresponding entry in Microsoft Excel.	Drop-down List	RSC - Workload Category
Reject Date	The date the request was rejected.	Date	Date
Department	Not Used	Auto-complete	KNTA - Department - Enabled
Workflow	The workflow the request will use. All Service Request use the SC - Generic workflow.	Auto-complete	CRT - Workflows - Restricted
Creation Date	Not Used	Date	Date
Contact Phone	Not Used	Auto-complete	CRT - Contact Phone - Restricted Enabled
Created By	Not Used	Auto-complete	KNTA - User Id - Enabled
Contact Name	Not Used	Auto-complete	CRT - Contact Name - Enabled
Application	Not Used	Auto-complete	KNTA - Application - Enabled
Contact Email	Not Used	Auto-complete	CRT - Contact Email - Restricted Enabled

Table 6-5. SC - Generic SR Header fields (page 8 of 8)

Field Name	Description	Type	Validation
Request Type	Not Used	Auto-complete	CRT - Request Type Names - All
Request Group	Not Used	Auto-complete	CRT - Prj Code - Enabled
% Complete	Not Used	Text	Text Field - 40
Sub-Type	Not Used	Auto-complete	CRT - SubTypes - Enabled
Company	Not Used	Auto-complete	CRT - Company
_Scheduled Start Date	Not Used	Date	Date
_Scheduled Finish Date	Not Used	Date	Date
_Scheduled Effort Over Duration	Not Used	Numeric	Numeric Text Field - 10 decimals
_Actual Start Date	Not Used	Date	Date
_Actual Finish Date	Not Used	Date	Date
Demand Satisfied Date	Not Used	Date	Date
Service Requested	Not Used	Date	Date
Service Satisfied	Not Used	Date	Date
Allow External Update of Actual Effort	Not Used	Radio Button	Yes No Radio Buttons
Master Project	Not Used	Auto-complete	PMO - Master Projects

SC - Application Access Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-6. SC - Application Access fields (page 1 of 4)

Field Name	Description	Type	Validation
Type of Access	Requestor mentions the type of Application access is needed by the service request	Drop-down List	Type of Access
Groups	Requestor Mentions the group out of the drop down list in this field.	Drop-down List	SC - Groups
Effective Date	Effective Date.	Date	Date
Expiration Date	Expiration Date.	Date	Date
Request Comments	Comments by the Service Requestor or by the manager.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)

Table 6-6. SC - Application Access fields (page 2 of 4)

Field Name	Description	Type	Validation
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field

Table 6-6. SC - Application Access fields (page 3 of 4)

Field Name	Description	Type	Validation
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-6. SC - Application Access fields (page 4 of 4)

Field Name	Description	Type	Validation
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)
Feedback Frequency	This field takes its value from the Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value Yes in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

SC - Communication Device Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-7. SC - Communication Device fields (page 1 of 5)

Field Name	Description	Type	Validation
Service Type/Package	This field specifies the Service Type and is being filled by the requestor.	Text	Text Area - 1800
Preferred Area Code (New Service)	This field contains the Preferred Area Code.	Text	Text Field - 10
Phone Number (Existing Account)	This field contains the Phone Number.	Numeric	Numeric Text Field
Other Product Description	This field contains some other extra information about the product and is being filled by the Requestor.	Text	Text Area - 1800
Accessories	This field contains some description about the accessories and is being filled by the Requestor.	Text	Text Field - 200
Delivery Instructions	This field contains the Delivery Instructions as filled by the Service Requestor.	Text	Text Field - 200
Request Comments	This field contains some comments by the Requestor.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled

Table 6-7. SC - Communication Device fields (page 2 of 5)

Field Name	Description	Type	Validation
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field

Table 6-7. SC - Communication Device fields (page 3 of 5)

Field Name	Description	Type	Validation
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-7. SC - Communication Device fields (page 4 of 5)

Field Name	Description	Type	Validation
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating

Table 6-7. SC - Communication Device fields (page 5 of 5)

Field Name	Description	Type	Validation
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)
Feedback Frequency	This field takes its value from Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value 'Yes' in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

SC - Conference Line Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-8. SC - Conference Line fields (page 1 of 5)

Field Name	Description	Type	Validation
Conference Line Type	This field contains the information on the kind of Conference Line being needed as are the choices in the Drop-down List by the Service Requestor.	Drop-down List	SC - Conference Line Type
Description/ Purpose	This field contains a small description being filled by the Service Requestor.	Text	Text Field - 200
Start Date/ Time	This field contains the Start Date/ Time being filled by the Requestor.	Date	SC - Date (with Time)
Finish Date/ Time	This field contains the Finish Date/ Time being filled by the Requestor.	Date	SC - Date (with Time)
Number of Lines	This field contains the number of Conference Lines being needed	Text	Text Field - 200
End Date for Dedicated Service	This field specifies the end date and is being filled by the Service Requestor.	Text	Text Field - 200
Special Instructions/ Recurring Dates	This field contains some special instructions being provided by the Service Requestor	Text	Text Area - 1800
Request Comments	This field contains some comments by the Requestor.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled

Table 6-8. SC - Conference Line fields (page 2 of 5)

Field Name	Description	Type	Validation
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled

Table 6-8. SC - Conference Line fields (page 3 of 5)

Field Name	Description	Type	Validation
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-8. SC - Conference Line fields (page 4 of 5)

Field Name	Description	Type	Validation
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)

Table 6-8. SC - Conference Line fields (page 5 of 5)

Field Name	Description	Type	Validation
Feedback Frequency	This field takes its value from Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value 'Yes' in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

SC - Hardware Procurement Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-9. SC - Hardware Procurement fields (page 1 of 5)

Field Name	Description	Type	Validation
Request Comments	This field contains some comments by the Requestor.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field

Table 6-9. SC - Hardware Procurement fields (page 2 of 5)

Field Name	Description	Type	Validation
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled

Table 6-9. SC - Hardware Procurement fields (page 3 of 5)

Field Name	Description	Type	Validation
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-9. SC - Hardware Procurement fields (page 4 of 5)

Field Name	Description	Type	Validation
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800

Table 6-9. SC - Hardware Procurement fields (page 5 of 5)

Field Name	Description	Type	Validation
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)
Feedback Frequency	This field takes its value from Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value 'Yes' in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

SC - Network Access Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-10. SC - Network Access fields (page 1 of 4)

Field Name	Description	Type	Validation
ID	Service Requestor or the manager fill this field by an Identification Number for the Network Access	Text	Text Field - 200
Domain System	Service Requestor or the manager enters the domain system in this field	Text	Text Field - 300
Effective Date	This field contains the Effective Date.	Date	Date
Expiration Date	This field contains the Expiration Date as is filled by the Service Requestor or the manager.	Date	Date
Request Comments	This field contains some comments by the Requestor.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action

Table 6-10. SC - Network Access fields (page 2 of 4)

Field Name	Description	Type	Validation
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field

Table 6-10. SC - Network Access fields (page 3 of 4)

Field Name	Description	Type	Validation
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-10. SC - Network Access fields (page 4 of 4)

Field Name	Description	Type	Validation
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)
Feedback Frequency	This field takes its value from Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value 'Yes' in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

SC - Phone and Voicemail Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-11. SC - Phone and Voicemail fields (page 1 of 5)

Field Name	Description	Type	Validation
Name to Display on Caller ID/ Directory	This field contains the name as should appear in a caller ID and is entered by the Service Requestor or the Recipient Manager.	Text	Text Field - 200
Existing Number (for existing lines)	Service Requestor or the Recipient Manager enters the Existing Number in this field.	Text	Text Field - 200
Phone Equipment Type	This field contains the information about the Phone Equipment Type.	Text	Text Field - 200
Phone Location	This field contains the information about the Phone Location.	Text	Text Field - 200
Request Comments	This field contains some comments by the Requestor.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field

Table 6-11. SC - Phone and Voicemail fields (page 2 of 5)

Field Name	Description	Type	Validation
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled

Table 6-11. SC - Phone and Voicemail fields (page 3 of 5)

Field Name	Description	Type	Validation
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-11. SC - Phone and Voicemail fields (page 4 of 5)

Field Name	Description	Type	Validation
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800

Table 6-11. SC - Phone and Voicemail fields (page 5 of 5)

Field Name	Description	Type	Validation
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)
Feedback Frequency	This field takes its value from Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value 'Yes' in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

SC - Software Procurement Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-12. SC - Software Procurement fields (page 1 of 4)

Field Name	Description	Type	Validation
Request Comments	This field contains some comments by the Requestor.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field

Table 6-12. SC - Software Procurement fields (page 2 of 4)

Field Name	Description	Type	Validation
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-12. SC - Software Procurement fields (page 3 of 4)

Field Name	Description	Type	Validation
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating

Table 6-12. SC - Software Procurement fields (page 4 of 4)

Field Name	Description	Type	Validation
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)
Feedback Frequency	This field takes its value from Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value 'Yes' in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

SC - VPN Access Request Type

Each Service Catalog content request type supports one or more service items within in the catalog. Every request type used within the catalog must contain the SC - Request Header. The decision to use one or more request types is based on the following considerations:

- The need to capture specific or additional information for a service item, such as a custom request type for a service.
- The need to report on a grouping of services by request type. Using a single request type for multiple service items can simplify the level of detail shown in portlets that report or filter by request type.

In addition, all Service Catalog content request types use the SC - Generic workflow.

Table 6-13. SC - VPN Access fields (page 1 of 5)

Field Name	Description	Type	Validation
VPN Type	This field stores the type of VPN being required by the requestor or recipient manager.	Drop-down List	SC - VPN Type
ID	This field contains the VPN Access ID.	Text	Text Field - 200
Operating System	This field contains the name of the operating system.	Drop-down List	SC - Operating System
Effective Date	Effective Date as is filled by the Service Requestor or Recipient Manager.	Date	Date
Expiration Date	Expiration Date as is filled by the Service Requestor or Recipient Manager.	Date	Date
Secure IS Access Card Required?	This field contains the value as Yes or No based on the question Secure IS Access Card Required?	Drop-down List	SC - Secure IS Access Card Required
Secure IS Access Card Number	This field contains the Secure IS Access Card Number.	Text	Text Field - 20
Request Comments	This field contains some comments by the Requestor.	Text	Text Area - 1800
Request Type Name	Name of the request type is captured here and the name of the request type is mentioned in the default of this field.	Auto-complete	CRT - Request Types - Enabled

Table 6-13. SC - VPN Access fields (page 2 of 5)

Field Name	Description	Type	Validation
Total Service Cost (Store)	This field stores the value of Total Service Cost field of Header.	Text	Currency Text Field
Authorized to Cancel	Captures the name of the user who is entitled to cancel the request in the initial steps of the workflow before Fulfillment step of the workflow.	Auto-complete	KNTA - User Id - Enabled
Service Owner	Name of the Service Owner. This field takes its value from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Fulfillment Owner	This field contains the name of the user who will be completing the fulfillment of the Service Request and takes its value from the corresponding entry in Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Action	This field contains kind of action being taken on the Service Request like Add, Modify or Change.	Drop-down List	SC - Action
Require Manager Approval	This field contains the Manager Approval option as Yes or NO and comes directly from the Microsoft Excel.	Radio Button	Radio Buttons (Y/N)
Escalation Owner	This field contains the name of the Escalation Owner and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Approver	This field contains the name of Level 1 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 1 Threshold	This field contains the threshold value for Level 1 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 2 Approver	This field contains the name of Level 2 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 2 Threshold	This field contains the threshold value for Level 2 and comes directly from Microsoft Excel.	Text	Currency Text Field

Table 6-13. SC - VPN Access fields (page 3 of 5)

Field Name	Description	Type	Validation
Level 3 Approver	This field contains the name of Level 3 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 3 Threshold	This field contains the threshold value for Level 3 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 4 Approver	This field contains the name of Level 4 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 4 Threshold	This field contains the threshold value for Level 4 and comes directly from Microsoft Excel.	Text	Currency Text Field
Level 5 Approver	This field contains the name of Level 5 Approver and comes directly from Microsoft Excel.	Auto-complete	SC - User Id and SG - Enabled
Level 5 Threshold	This field contains the threshold value for Level 5 and comes directly from Microsoft Excel.	Text	Currency Text Field
Service Notes	This field contains the Service Notes corresponding to a service item being requested by the Service Requestor and comes directly from Microsoft Excel.	Text	Text Area - 1800
Service Cost Low	This field contains the Service Cost at Low priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Low	This field contains the Service Duration at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Low	This field contains the Service Duration Effort at Low priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Normal	This field contains the Service Cost at Normal priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Normal	This field contains the Service Duration at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field

Table 6-13. SC - VPN Access fields (page 4 of 5)

Field Name	Description	Type	Validation
Service Duration Effort Normal	This field contains the Service Duration Effort at Normal priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost High	This field contains the Service Cost at High priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration High	This field contains the Service Duration at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort High	This field contains the Service Duration Effort at High priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Cost Critical	This field contains the Service Cost at Critical priority and comes from Microsoft Excel.	Text	Currency Text Field
Service Duration Critical	This field contains the Service Duration at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Service Duration Effort Critical	This field contains the Service Duration Effort at Critical priority and comes from Microsoft Excel.	Numeric	Numeric Text Field
Fulfillment Acceptance Required	This field contains the Yes or No value which specifies whether a fulfillment acceptance step is needed in the workflow or not.	Text	Text Field - 20
Question1	This field is used for asking a question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer1	In this field requestor gives the feedback on the Service Fulfillment.	Drop-down List	SC - Survey Rating
Question2	This field is again used for asking another question about the Service Fulfillment of the Service Request being made by the requestor.	Text	Text Field - 300
Answer2	In this field requestor again gives the feedback on the Service Fulfillment based on the second question being asked.	Drop-down List	SC - Survey Rating

Table 6-13. SC - VPN Access fields (page 5 of 5)

Field Name	Description	Type	Validation
Feedback Comments	This field contains some feedback comments of the requestor if there are any.	Text	Text Area - 1800
Average Score	Based on the answers being provided by the Requestor the value is calculated for this field.	Drop-down List	SC - Average Score
Feedback Required	This contains some additional cost incurred during the fulfillment stage.	Radio Button	Radio Buttons (Y/N)
Feedback Frequency	This field takes its value from Microsoft Excel and gives the number of orders a requestor wants for the corresponding service item in the catalog.	Numeric	Numeric Text Field (length = 4)
Rework Required	This field contains the value 'Yes' in case the requestor sends the request back to the fulfillment owner by not accepting it.	Text	Text Field - 10

Service Catalog Content Service Item User Data

Table 6-14 lists the service item user data that is used to map service configuration values stored in the service item tables to requests. The values stored for each service item are passed as default values to newly created requests.

Table 6-14. Service Catalog content Service item user data (page 1 of 3)

Num	Field Name	User Data Token	Usage
1	Service Request	REQUEST_TYPE_ID	
2	Service Department	DEPARTMENT_CODE	The department name of the group that is responsible for the business of providing the service item.
3	Service Owner	SERVICE_OWNER	The name of the owner of service item. This refers to the person responsible for the business of providing the service item.
5	Service Contact	SC_SERVICE_CONTACT	The name of the person who is the primary contact for any inquiries related to the service item.

Table 6-14. Service Catalog content Service item user data (page 2 of 3)

Num	Field Name	User Data Token	Usage
6	Service Delivery Information	DELIVERY_INFORMATION_NOTE	Text used to describe service delivery.
7	Service Type Instructions	INSTRUCTIONS	Text used to describe service delivery.
8	Service Request Description	DESCRIPTION	Text used to describe the service.
9	Workload	KNTA_WORKLOAD	Indication if the service will Roll-Up to Mercury IT Governance Center workload.
10	Workload Category	KNTA_WORKLOAD_CATEGORY	The workload category for the service.
11	Skill	KNTA_SKILL	The skill required for the service.
12	Require Manager Approval	MGR_APPROVAL_REQUIRED	Indication if the service requires manager approval.
13	Fulfillment Owner	FULFILLMENT_OWNER	Name of the fulfillment owner for the service.
14	Escalation Owner	ESCALATION_OWNER	Name of the escalation owner for the service.
15	Level 1 Approver	LEVEL_1_APPROVER	The name of the user who will provide level 1 approval.
16	Level 1 Threshold	LEVEL_1_THRESHOLD	The value the service must reach to require level 1 approval. "0" may be used for required approval regardless of cost.
17	Level 2 Approver	LEVEL_2_APPROVER	The name of the user who will provide level 2 approval.
18	Level 2 Threshold	LEVEL_2_THRESHOLD	The value the service must reach to require level 2 approval. "0" may be used for required approval regardless of cost.
19	Level 3 Approver	LEVEL_3_APPROVER	The name of the user who will provide level 3 approval.
20	Level 3 Threshold	LEVEL_3_THRESHOLD	The value the service must reach to require level 3 approval. "0" may be used for required approval regardless of cost.
21	Level 4 Approver	LEVEL_4_APPROVER	The name of the user who will provide level 4 approval.
22	Level 4 Threshold	LEVEL_4_THRESHOLD	The value the service must reach to require level 4 approval. "0" may be used for required approval regardless of cost.
23	Level 5 Approver	LEVEL_5_APPROVER	The name of the user who will provide level 5 approval.
24	Level 5 Threshold	LEVEL_5_THRESHOLD	The value the service must reach to require level 5 approval. "0" may be used for required approval regardless of cost.
25	Fulfillment Acceptance	FULFILLMENT_ACCEPT	Indication of fulfillment acceptance is required for the service.

Table 6-14. Service Catalog content Service item user data (page 3 of 3)

Num	Field Name	User Data Token	Usage
26	Feedback Required	REQUIRE_FEEDBACK	Indication if feedback is required for the service.
27	Feedback Frequency	FEEDBACK_FREQUENCY	Specifies frequency of feedback. 1 - every request required feedback, 2 - every "second" request, 3 - every third request, etc.
28	Service Duration Low	DURATION_LOW	The duration for low priority requests.
29	Service Duration Effort Low	DURATION_EFFORT_LOW	The effort for low priority requests.
30	Service Cost Low	COST_LOW	The cost for low priority requests.
31	Service Duration Normal	DURATION_NORMAL	The duration for normal priority requests.
32	Service Duration Effort Normal	DURATION_EFFORT_NORMAL	The effort for normal priority requests.
33	Service Cost Normal	COST_NORMAL	The cost for normal priority requests.
34	Service Duration High	DURATION_HIGH	The duration for high priority requests.
35	Service Duration Effort High	DURATION_EFFORT_HIGH	The effort for high priority requests.
36	Service Cost High	COST_HIGH	The cost for high priority requests.
37	Service Duration Critical	DURATION_CRITICAL	The duration for critical priority requests.
38	Service Duration Effort Critical	DURATION_EFFORT_CRITICAL	The effort for critical priority requests.
39	Service Cost Critical	COST_CRITICAL	The cost for critical priority requests.
40	Action	ACTION	
41	Internal Service Cost	INTERNAL_COST	

Service Catalog Content Workflows

This section details the rules (e.g. security, relationship of steps to field values) that govern workflow steps and related screen behavior

Service Catalog Generic Service Request Workflow

The Generic Service Request workflow is used by all out-of-the-box Service Catalog content request types. It contains the primary workflow steps as listed in [Table 6-15](#). Not all workflow steps are mandatory for every service; service item configuration (through the XML importer) has a direct impact on the workflow path followed by a service item.

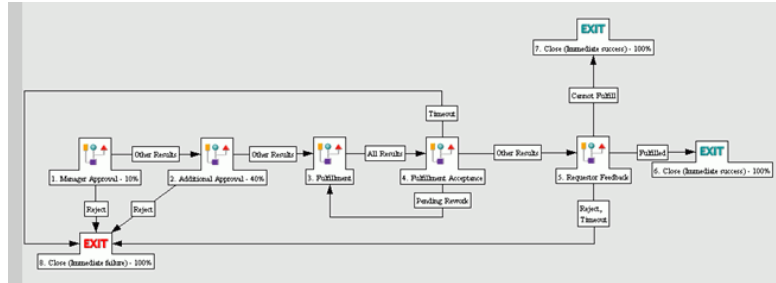


Figure 6-4. Service Catalog Generic Service Request workflow

Table 6-15. Service Catalog Generic Service Request workflow

Step Name	Description	User Security	Status
Manager Approval - 10%	Subworkflow for Manager Approval.		
Additional Approval - 40%	Sub Workflow for Advanced Approval		
Fulfillment	Sub Workflow for Fulfilling the Service Request		
Fulfillment Acceptance	Sub Workflow for fulfillment acceptance		
Requestor Feedback	Sub Workflow for Requestor Feedback		
Close (Immediate success)	Close (Immediate success)		Complete
Close (Immediate success)	Close (Immediate success)		Complete
Close (Immediate failure)	Close (Immediate failure)		Rejected

Service Catalog Manager Approval Subworkflow

Manager Approval is an optional and configurable subworkflow that provides approval for a Service Recipient’s Functional Manager.

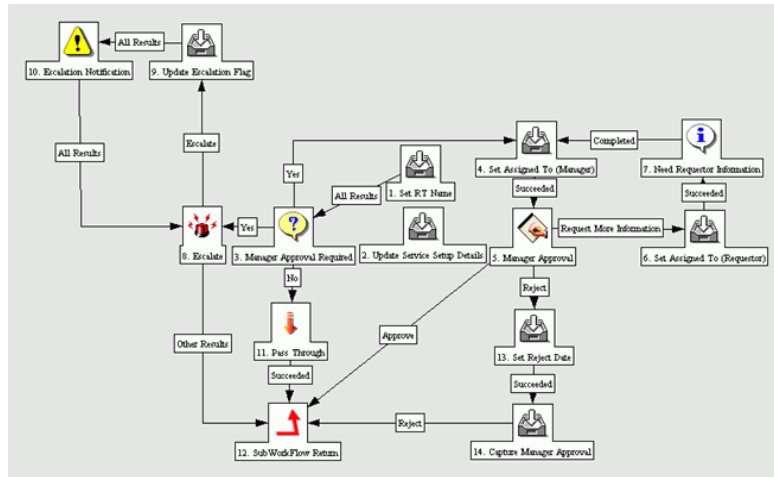


Figure 6-5. Service Catalog Manager Approval subworkflow

Table 6-16. Service Catalog Manager Approval subworkflow (page 1 of 2)

Step Name	Description	User Security	Status
Set RT Name	Update the request type name in request field		
Manager Approval Required	Check whether manager approval is required or not	Mercury IT Governance Center Administrator	
Set Assigned To (Manager)	Update assigned to field with recipient manager		
Manager Approval	Manager can approve or reject the request. Manager decision will be taken on this step.	[REQ.P.SC_RECIPIENT_MANAGER]; [REQ.ASSIGNED_TO_USER_ID]; [REQ.P.SC_RECIPIENT_MANAGER_ALTERNATE]; Mercury IT Governance Center Administrator	Pending Manager Approval
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name		
Need Requestor Information	More information needed in order to process the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	Pending Requestor Info

Table 6-16. Service Catalog Manager Approval subworkflow (page 2 of 2)

Step Name	Description	User Security	Status
Escalate	Requestor and recipient will act on this step and they can escalate the issue.	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Update Escalation Flag	Update the flag if ever the request is being escalated		
Escalation Notification	Send notification to recipient manager and service escalation owner if request is escalated		
Pass Through	Skip corresponding approval. Manager approval is not needed.		
Set Reject Date	Update the request field with rejection date.		
Capture Manager Approval	Captures the action taken by manager		
Sub Workflow Return	Return from sub workflow		

Service Catalog Advanced Approval Subworkflow

Advanced Approval is a subworkflow that provides advanced approval.

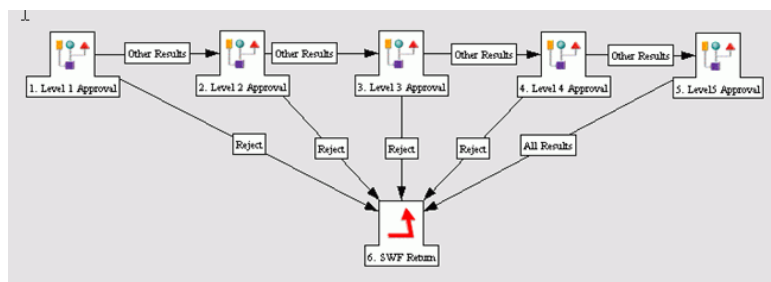


Figure 6-6. Service Catalog Advanced Approval subworkflow

Table 6-17. Service Catalog Advanced Approval subworkflow (page 1 of 2)

Step Name	Description	User Security	Status
Level 1 Approval	Sub workflow for level 1 approver		
Level 2 Approval	Sub workflow for level 2 approver		

Table 6-17. Service Catalog Advanced Approval subworkflow (page 2 of 2)

Step Name	Description	User Security	Status
Level 3 Approval	Sub workflow for level 3 approver		
Level 4 Approval	Sub workflow for level 4 approver		
Level 5 Approval	Sub workflow for level 5 approver		
SWF Return	Return from sub workflow		

Service Catalog Level 1 Approval Subworkflow

Level 1 Approval is an optional and configurable subworkflow providing approval for a named level approver once a predetermined financial threshold is reached.

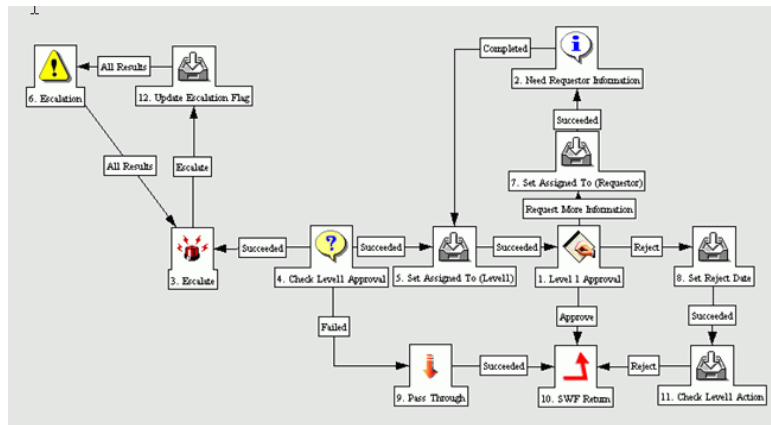


Figure 6-7. Service Catalog Level 1 Approval subworkflow

Table 6-18. Service Catalog Level 1 Approval subworkflow

Step Name	Description	User Security	Status
Level 1 Approval	Level 1 approver is supposed to take action on this step. It can accept or reject the request.	[REQD.P.SERVICE_LEVEL_1_APPROVER]; [REQD.VP.SERVICE_LEVEL_1_APPROVER]; [REQ.ASSIGNED_TO_GROUP_ID]; [REQ.ASSIGNED_TO_USER_ID]; Mercury IT Governance Center Administrator	Pending Level 1 Approval
Need Requestor Information	More information from requestor or recipient needed in order to process the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	Pending Requestor Info
Escalate	User can escalate the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Check Level1 Approval	Check whether the level 1 approval is required or not	[REQ.P.SC_RECIPIENT_MANAGER]; [REQ.ASSIGNED_TO_USER_ID]; [REQ.P.SC_RECIPIENT_MANAGER_ALTERNATE]; Mercury IT Governance Center Administrator	
Set Assigned To (Level1)	Update 'Assigned to' field with level 1 approver		
Escalation	Send notification to recipient manager and service escalation owner		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name		
Set Reject Date	Update the request field with the rejection date		
Pass Through	Skip corresponding approval. Level 1 approver action is not needed.		
Check Level1 Action	Check the action taken by level 1 approver		
Update Escalation Flag	Update the flag if any issue is being escalated		
SWF Return	Return from sub workflow		

Service Catalog Level 2 Approval Subworkflow

Level 2 Approval is an optional and configurable subworkflow providing approval for a named level approver once a predetermined financial threshold is reached.

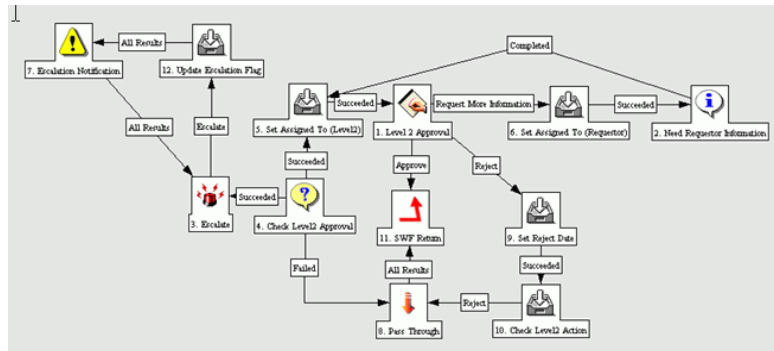


Figure 6-8. Service Catalog Level 2 Approval subworkflow

Table 6-19. Service Catalog Level 2 Approval subworkflow (page 1 of 2)

Step Name	Description	User Security	Status
Level 2 Approval	Level 2 approver is supposed to take action on this step. It can accept or reject the request.	[REQD.P.SERVICE_LEVEL_1_APPROVER]; [REQD.VP.SERVICE_LEVEL_1_APPROVER]; [REQ.ASSIGNED_TO_GROUP_ID]; [REQ.ASSIGNED_TO_USER_ID]; Mercury IT Governance Center Administrator	Pending Level 2 Approval
Need Requestor Information	More information needed from requestor or recipient in order to process the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	Pending Requestor Info
Escalate	User can escalate the request.	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	

Table 6-19. Service Catalog Level 2 Approval subworkflow (page 2 of 2)

Step Name	Description	User Security	Status
Check Level2 Approval	Check whether the level 2 approval is required or not	[REQ.P.SC_RECIPIENT_MANAGER]; [REQ.ASSIGNED_TO_USER_ID]; [REQ.P.SC_RECIPIENT_MANAGER_ALTERNATE]; Mercury IT Governance Administrator	
Set Assigned To (Level2)	Update 'Assigned to' field with level 2 approver		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Escalation Notification	Send notification to recipient manager and service escalation owner		
Pass Through	Skip corresponding approval. Level 2 approver action is not needed.		
Set Reject Date	Update the request field with request rejection date.		
Check Level2 Action	Check the action taken by level 2 approver		
Update Escalation Flag	Update the flag if any issue is being escalated		
SWF Return	Return from sub workflow		

Service Catalog Level 3 Approval Subworkflow

Level 3 Approval is an optional and configurable subworkflow for a named level approver once a predetermined financial threshold is reached.

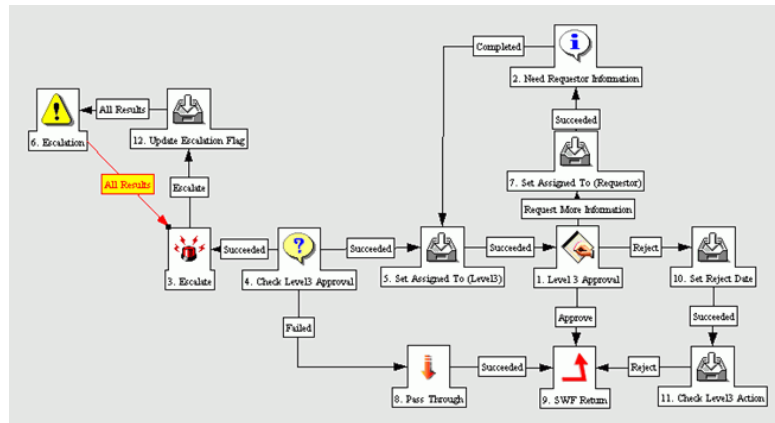


Figure 6-9. Service Catalog Level 3 Approval subworkflow

Table 6-20. Service Catalog Level 3 Approval subworkflow (page 1 of 2)

Step Name	Description	User Security	Status
Level 3 Approval	Level 3 approver is supposed to take action on this step. It can accept or reject the request.	[REQD.P.SERVICE_LEVEL_1_APPROVER]; [REQD.VP.SERVICE_LEVEL_1_APPROVER]; [REQ.ASSIGNED_TO_GROUP_ID]; [REQ.ASSIGNED_TO_USER_ID]; Mercury IT Governance Center Administrator	Pending Level 2 Approval
Need Requestor Information	More information needed from requestor or recipient in order to process the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	Pending Requestor Info
Escalate	User can escalate the request.	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Check Level3 Approval	Check whether the level 3 approval is required or not	[REQ.P.SC_RECIPIENT_MANAGER]; [REQ.ASSIGNED_TO_USER_ID]; [REQ.P.SC_RECIPIENT_MANAGER_ALTERNATE]; Mercury IT Governance Center Administrator	
Set Assigned To (Level3)	Update 'Assigned to' field with level 3 approver		

Table 6-20. Service Catalog Level 3 Approval subworkflow (page 2 of 2)

Step Name	Description	User Security	Status
Escalation	Send notification to recipient manager and service escalation owner.		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Pass Through	Skip corresponding approval. Level 3 approver action is not needed.		
Set Reject Date	Update the request field with request rejection date.		
Check Level3 Action	Check the action taken by level 3 approver		
Update Escalation Flag	Update the flag if any issue is being escalated.		
SWF Return	Return from sub workflow		SWF Return

Service Catalog Level 4 Approval Subworkflow

Level 4 Approval is an optional and configurable subworkflow providing for a named level approver once a predetermined financial threshold is reached.

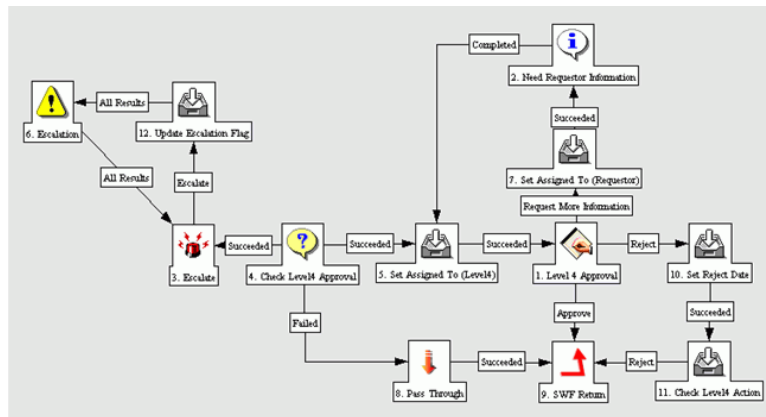


Figure 6-10. Service Catalog Level 4 Approval subworkflow

Table 6-21. Service Catalog Level 4 Approval subworkflow (page 1 of 2)

Step Name	Description	User Security	Status
Level 4 Approval	Level 4 approver is supposed to take action on this step. It can accept or reject the request.	[REQD.P.SERVICE_LEVEL_1_APPROVER]; [REQD.VP.SERVICE_LEVEL_1_APPROVER]; [REQ.ASSIGNED_TO_GROUP_ID]; [REQ.ASSIGNED_TO_USER_ID]; Mercury IT Governance Center Administrator	Pending Level 4 Approval
Need Requestor Information	More information needed from requestor or recipient in order to process the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	Pending Requestor Info
Escalate	User can escalate the request.	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Check Level4 Approval	Check whether the level 4 approval is required or not	[REQ.P.SC_RECIPIENT_MANAGER]; [REQ.ASSIGNED_TO_USER_ID]; [REQ.P.SC_RECIPIENT_MANAGER_ALTERNATE]; Mercury IT Governance Center Administrator	
Set Assigned To (Level4)	Update 'Assigned to' field with level 4 approver		
Escalation	Send notification to recipient manager and service escalation owner.		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Pass Through	Skip corresponding approval. Level 4 approver action is not needed.		
Set Reject Date	Update the request field with request rejection date.		
Check Level4 Action	Check the action taken by level 4 approver.		

Table 6-21. Service Catalog Level 4 Approval subworkflow (page 2 of 2)

Step Name	Description	User Security	Status
Update Escalation Flag	Update the flag if any issue is being escalated.		
SWF Return	Return from sub workflow		

Service Catalog Level 5 Approval Subworkflow

Level 5 Approval is an optional and configurable subworkflow providing approval for a named level approver once a predetermined financial threshold is reached.

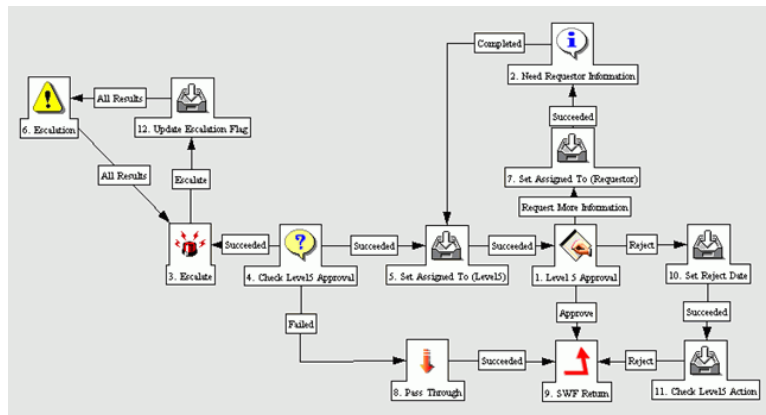


Figure 6-11. Service Catalog Level 5 Approval subworkflow

Table 6-22. Service Catalog Level 5 Approval subworkflow (page 1 of 2)

Step Name	Description	User Security	Status
Level 5 Approval	Level 5 approver is supposed to take action on this step. It can accept or reject the request.	[REQD.P.SERVICE_LEVEL_1_APPROVER]; [REQD.VP.SERVICE_LEVEL_1_APPROVER]; [REQ.ASSIGNED_TO_GROUP_ID]; [REQ.ASSIGNED_TO_USER_ID]; Mercury IT Governance Center Administrator	Pending Level 2 Approval
Need Requestor Information	More information needed from requestor or recipient in order to process the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	Pending Requestor Info
Escalate	User can escalate the request.	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Check Level5 Approval	Check whether the level 5 approval is required or not	[REQ.P.SC_RECIPIENT_MANAGER]; [REQ.ASSIGNED_TO_USER_ID]; [REQ.P.SC_RECIPIENT_MANAGER_ALTERNATE]; Mercury IT Governance Center Administrator	
Set Assigned To (Level5)	Update 'Assigned to' field with level 5 approver		
Escalation	Send notification to recipient manager and service escalation owner.		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Pass Through	Skip corresponding approval. Level 5 approver action is not needed.		
Set Reject Date	Update the request field with request rejection date.		
Check Level5 Action	Check the action taken by level 5 approver.		

Table 6-22. Service Catalog Level 5 Approval subworkflow (page 2 of 2)

Step Name	Description	User Security	Status
Update Escalation Flag	Update the flag if any issue is being escalated.		
SWF Return	Return from sub workflow		

Service Catalog Fulfillment Subworkflow

Fulfillment Delivery is a subworkflow providing the goods or services specified within each service request.

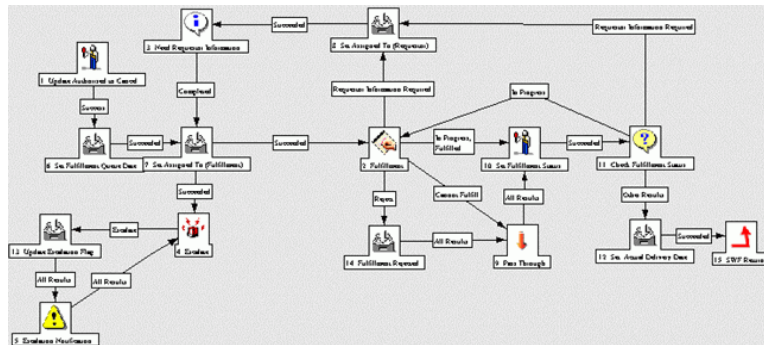


Figure 6-12. Service Catalog Fulfillment subworkflow

Table 6-23. Service Catalog Fulfillment subworkflow (page 1 of 2)

Step Name	Description	User Security	Status
Update Authorized to Cancel	Step disallows the service requestor to cancel the request. This step onwards requestor and recipient wouldn't get 'Request cancel' Button.		
Fulfillment	Step at which requirements will be fulfilled	[REQ.ASSIGNED_TO_GROUP_ID]; [REQ.ASSIGNED_TO_USER_ID]; [REQD.VP.SERVICE_FULFILLMENT_OWNER]; [REQD.P.SERVICE_FULFILLMENT_OWNER]; Mercury IT Governance Center Administrator	Pending Fulfillment

Table 6-23. Service Catalog Fulfillment subworkflow (page 2 of 2)

Step Name	Description	User Security	Status
Need Requestor Information	More information needed from requestor or recipient in order to process the request	[REQ.P.KNTA_SRC_REQUESTED_FOR];	
[REQ.P.KNTA_SRC_REQUESTOR]	Pending Requestor Info		
Escalate	User can escalate the request	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]	
Escalation Notification	Send notification to recipient manager and service escalation owner if request is escalated.		
Set Fulfillment Queue Date	Update the date on which the request entered for fulfillment.		
Set Assigned To (Fulfillment)	Update 'Assigned to' field with fulfillment owner name		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name		
Pass Through	Skip corresponding approval.		
Set Fulfillment Status	Captures and updates the Fulfillment Status		
Check Fulfillment Status	Check Fulfillment Status		
Set Actual Delivery Date	Update the request field with actual delivery date		
Fulfillment Rejected	Update the hidden field in request with flag when request is rejected.		
SWF Return	Return from sub workflow		

Service Catalog Fulfillment Acceptance Subworkflow

Fulfillment Acceptance is an optional and configurable subworkflow providing a requestor approval verification for completed services.

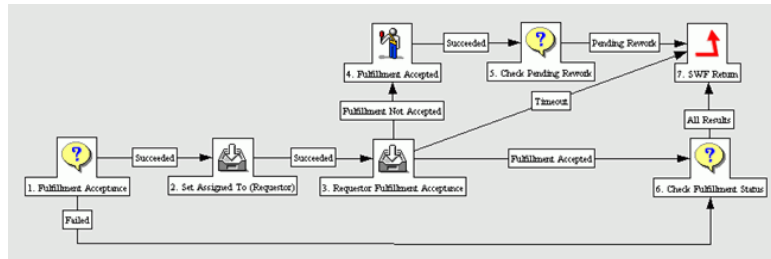


Figure 6-13. Service Catalog Fulfillment Acceptance subworkflow

Table 6-24. Service Catalog Fulfillment Acceptance subworkflow

Step Name	Description	User Security	Status
Fulfillment Acceptance	Step checks whether a fulfillment acceptance is needed in the workflow or not.		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name	[REQ.ASSIGNED_TO_GROUP_ID]; [REQ.ASSIGNED_TO_USER_ID]; [REQD.VP.SERVICE_FULFILLMENT_OWNER]; [REQD.P.SERVICE_FULFILLMENT_OWNER]; Mercury IT Governance Center Administrator	Pending Fulfillment
Requestor Fulfillment Acceptance	On this step requestor or recipient can decide whether they are satisfied with fulfillment of requirements or not	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]; Mercury IT Governance Center Administrator	Pending Fulfillment Acceptance
Fulfillment Accepted	Update 'Rework required' field with flag in order to specify that fulfillment is not accepted		Pending Fulfillment Acceptance
Check Pending Rework	Step is used for checking the pending rework		
Check Fulfillment Status	This step will check the fulfillment status		
SWF Return	Return from sub workflow		

Service Catalog Requestor Feedback Subworkflow

Requestor Feedback is an optional and configurable subworkflow providing an indication by the requestor of the satisfaction levels for completed service.

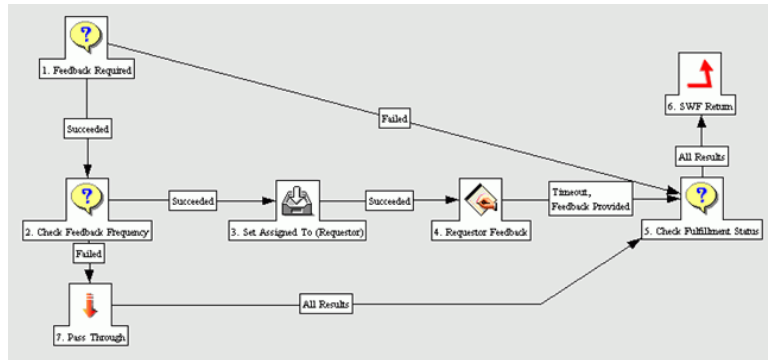


Figure 6-14. Service Catalog Requestor Feedback subworkflow

Table 6-25. Service Catalog Requestor Feedback subworkflow

Step Name	Description	User Security	Status
Feedback Required	Step will check whether requestor feedback is needed or not		
Check Feedback Frequency	On the basis of feedback frequency it will check whether the feedback is needed or not		
Set Assigned To (Requestor)	Update 'Assigned to' field with requestor name		
Requestor Feedback	Requestor will provide the feedback on service fulfillment	[REQ.P.KNTA_SRC_REQUESTED_FOR]; [REQ.P.KNTA_SRC_REQUESTOR]; Mercury IT Governance Center Administrator	Pending Requestor Feedback
Check Fulfillment Status	Step will check the fulfillment status		
Pass Through	Skip the requestor feedback		
SWF Return	Return from sub workflow		

Service Catalog Content Modules

This section documents the Mercury Service Catalog content role-based modules and their assigned portlets.

SC - Executive Module

- Page 1. SC Executive (Open Activity)
 - Open Catalog Requests by Service (last 60 Days)
 - Open Requests by Recipient Department (last 60 Days)
 - Catalog Activity
 - Requesting Department Activity
- Page 2. SC Executive Metrics
 - Satisfactory Feedback by Service Name (last 60 days)
 - Unsatisfactory Feedback by Service Name (last 60 days)
 - Satisfactory Feedback by Service Department (last 60 days)
 - Unsatisfactory Feedback by Service Department (last 60 days)
 - SLA Exception Roll Up
 - Consolidated Catalog Demand (Past 2 Months, Future 2 Months)

SC - Management Module

- Page 1. SC Detail
 - Catalog Volume by Status (120 Day) Portlet
 - Catalog Volume by Service Name (120 Day) Portlet
 - Catalog Volume by Service Department (120 Day) Portlet

- Page 2. SC Management
 - Open Catalog Requests by Service Name (last 60 days) Portlet
 - Open Catalog Requests by Recipient Department (last 60 days) Portlet
 - Catalog Activity Portlet
 - Open Catalog Volume by Service Name (last 60 days) Portlet
- Page 3. SC Quality Management
 - Satisfactory Feedback by Service Name (last 60 days) Portlet
 - Unsatisfactory Feedback by Service Name (last 60 days) Portlet
 - SLA Exception Roll Up Portlet
 - Service Outcome (last 60 days) Portlet

SC - Fulfillment Module

- Page 1. SC Fulfillment Detail
 - My Requests Portlet
 - Service Request Pipeline Portlet
 - Service Requests in Fulfillment Portlet
 - Closed Service Requests (last 60 days) Portlet
 - Request References Portlet
- Page 2. SC Detail
 - Catalog Volume by Status (last 120 days) Portlet
 - Catalog Volume by Service Name (last 120 days) Portlet
 - Catalog Volume by Service Department (last 120 days) Portlet

SC - Requestor Module

- Page 1. SC Requestor
 - My Service Request List Portlet
 - My Requests Portlet

Service Catalog Content Portlets

This section details a set of portlets that can provide real-time views into the Mercury Service Catalog. The portlets have been organized into “role” based modules to simplify the distribution/publication process.

Open Catalog Requests by Service (last 60 Days) Portlet

Displays all requests that are “open” and grouped by a specified set of Services.

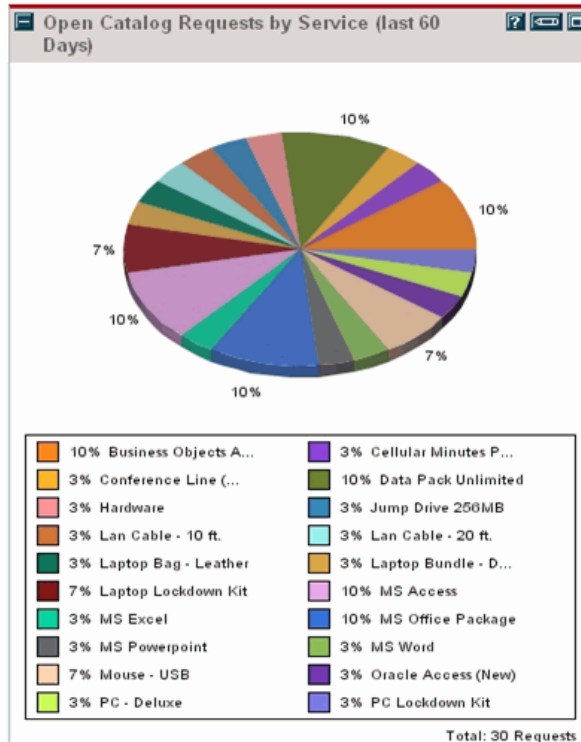


Figure 6-15. Open Catalog Requests by Service portlet

Table 6-26. Open Catalog Requests by Service applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Status	New; In Progress; Pending Requestor Info; Pending Requestor Feedback; Pending Fulfillment Details; Pending Level 2 Approval; Pending Level 1 Approval; Pending Child Requests Completion/ Closure; Pending Fulfillment; Pending Manager Approval
Created	Last 60 Days

Open Requests by Recipient Department (last 60 Days) Portlet

Displays all requests that are “open” and grouped by a specified set of Recipient Departments.

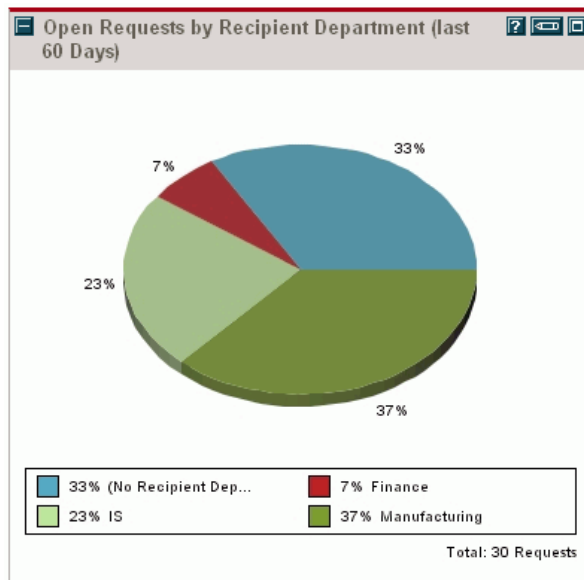


Figure 6-16. Open Requests by Recipient Department portlet

Table 6-27. Open Requests by Recipient Department applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Status	In Progress; Pending Requestor Info; Pending Requestor Feedback; Pending Fulfillment Details; Pending Level 2 Approval; Pending Level 1 Approval; Pending Fulfillment; Pending Manager Approval
Created	Last 60 Days

Catalog Activity Portlet

Displays summary open/closed count of recent request activity.

Request Type	Current Open Reqs	Opened Week of	Closed Week of	Opened Week of	Closed Week of
SC - Application Access	4	10/15/06	1	0	10/3/06
SC - Communications Device	6	8	1	1	0
SC - Conference Line	1	1	0	0	0
SC - Hardware Procurement	13	0	0	16	3
SC - Network Access	0	1	1	0	0

Figure 6-17. Catalog Activity portlet

Table 6-28. Catalog Activity applied filters

Field Name	Description
Request Group	Service Request
Grouped By	Request Type

Service Department Activity Portlet

Displays summary open/closed count of recent request activity.



Figure 6-18. Service Department Activity portlet

Table 6-29. Service Department Activity applied filters

Field Name	Description
Request Group	Service Request
Grouped By	Department

Satisfactory Feedback by Service Name (last 60 Days) Portlet

Displays request counts of completed services that received satisfactory feedback for the last 60 days.

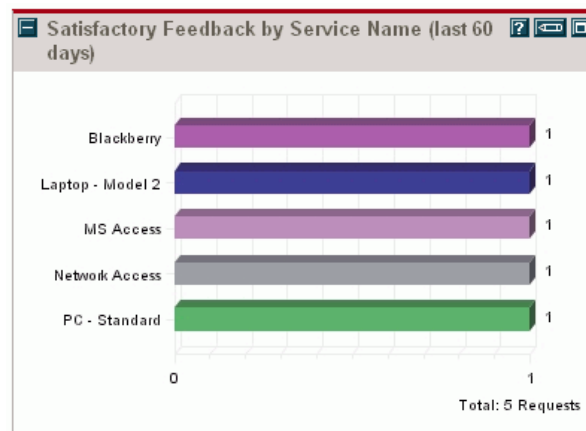


Figure 6-19. Satisfactory Feedback by Service Name portlet

Table 6-30. Satisfactory Feedback by Service Name applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Status	Complete
Average Score	3.0; 3.5; 4.0; 4.5; 5.0; 5.5
Created	Last 60 Days
Group By	Service Name

Unsatisfactory Feedback by Service Name (last 60 Days) Portlet

Displays request counts of completed services that received unsatisfactory feedback for the last 60 days.

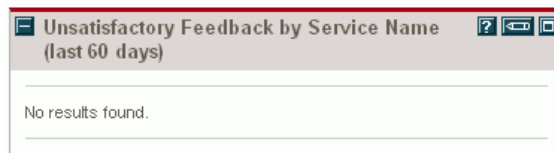


Figure 6-20. Unsatisfactory Feedback by Service Name portlet

Table 6-31. Unsatisfactory Feedback by Service Name applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Status	Complete
Average Score	1.0; 1.5; 2.0; 2.5
Created	Last 60 Days
Group By	Service Name

Satisfactory Feedback by Service Department (last 60 Days) Portlet

Displays request counts of completed services that received satisfactory feedback for the last 60 days.

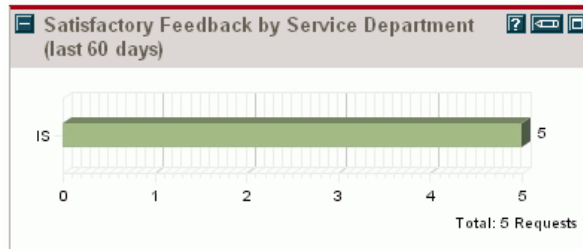


Figure 6-21. Satisfactory Feedback by Service Department portlet

Table 6-32. Satisfactory Feedback by Service Department applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Status	Complete
Average Score	3.0; 3.5; 4.0; 4.5; 5.0; 5.5
Created	Last 60 Days
Group By	Service Department

Unsatisfactory Feedback by Service Department (last 60 Days) Portlet

Displays request counts of completed services that received unsatisfactory feedback for the last 60 days.

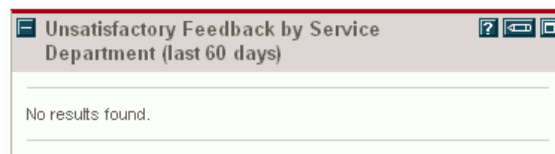


Figure 6-22. Unsatisfactory Feedback by Service Department portlet

Table 6-33. Unsatisfactory Feedback by Service Department applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Status	Complete
Average Score	1.0; 1.5; 2.0; 2.5
Created	Last 60 Days
Group By	Service Department

SLA Exceptions Roll-Up Portlet

Displays requests that were completed within and outside of SLA parameters.

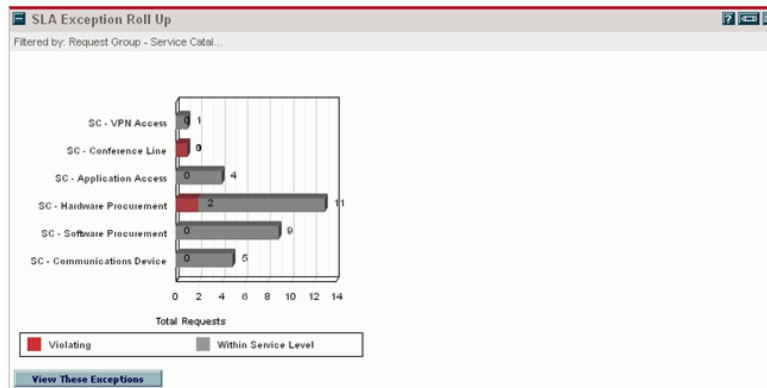


Figure 6-23. SLA Exception Roll-Up portlet

Table 6-34. SLA Exception Roll-Up applied filters

Field Name	Description
Demand Set	Service Catalog Demand Set
Request Group	Service Catalog
Demand Disposition	Backlog; New; Scheduled
Group By	Request Type

Consolidated Catalog Demand (Past 2 Months, Future 2 Months) Portlet

Displays total demand level for requests created in the past 2 months and request in queue for the future 2 months.

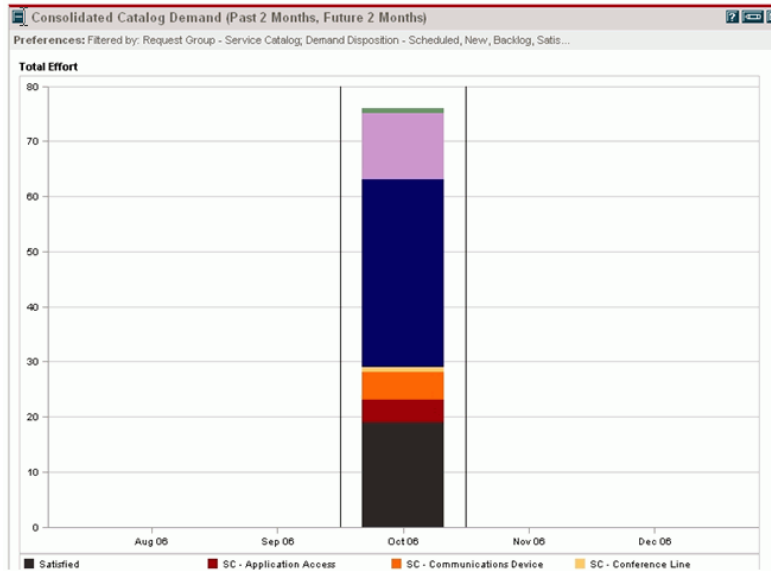


Figure 6-24. Consolidated Catalog Demand portlet

Table 6-35. Consolidated Catalog Demand applied filters

Field Name	Description
Demand Set	Service Catalog Demand Set
Request Group	Service Catalog
Demand Disposition	Backlog; New; Scheduled
Group By	Request Type
Display	2 past periods, 2 future periods

Catalog Volume by Status (last 120 Days) Portlet

Displays total request counts (by Status) of all services for the last 120 days.

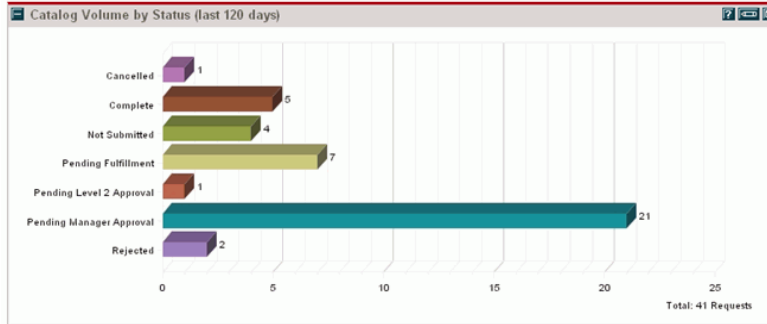


Figure 6-25. Catalog Volume by Status portlet

Table 6-36. Catalog Volume by Status applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Created	Last 120 Days
Group By	Status

Catalog Volume by Service Name (last 120 Days) Portlet

Displays total request counts (by Service Name) of all services for the last 120 days.

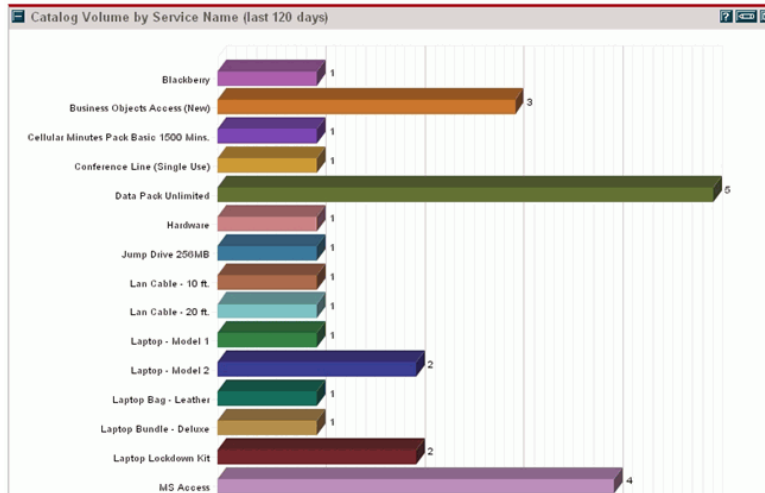


Figure 6-26. Catalog Volume by Service Name portlet

Table 6-37. Catalog Volume by Service Name applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Created	Last 120 Days
Group By	Service Name

Catalog Volume by Service Department (last 120 Days) Portlet

Displays total request counts (by Service Department) of all services for the last 120 days.

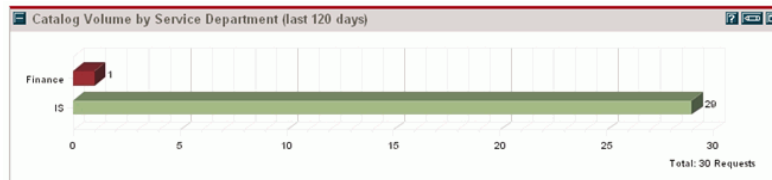


Figure 6-27. Catalog Volume by Service Department portlet

Table 6-38. Catalog Volume by Service Department applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Created	Last 120 Days
Group By	Service Department

Service Outcome (last 60 Days) Portlet

Displays total request counts (Fulfillment Status) of all closed services for the last 60 days.

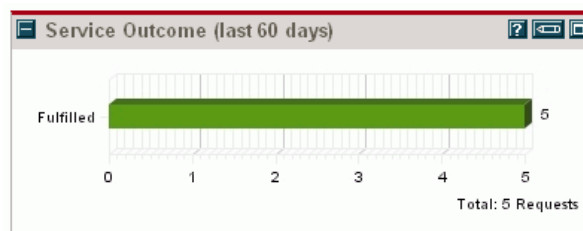


Figure 6-28. Service Outcome portlet

Table 6-39. Service Outcome applied filters

Field Name	Description
Request Type	SC - Software Procurement, SC - Network Access, SC - Hardware Procurement, SC - Conference Line, SC - Phone and Voicemail, SC - Application Access, SC - Communications Device, SC - VPN Access
Created	Last 60 Days
Group By	Fulfillment Status
Request Status	Complete

Assignment Queue - Prioritized Portlet

Displays open services with scheduled start dates and current assignment information.

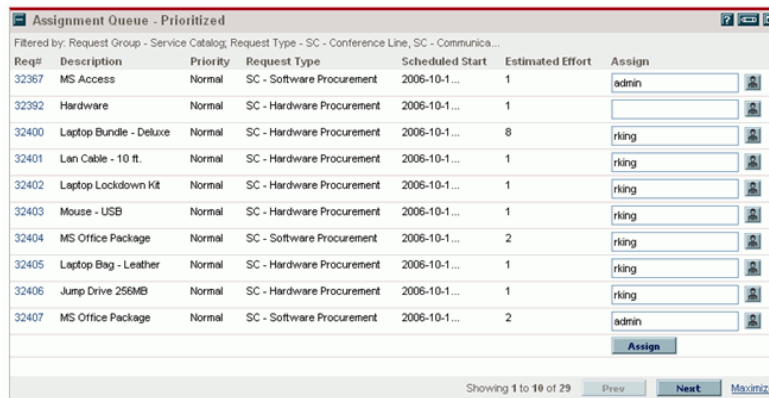


Figure 6-29. Assignment Queue - Prioritized portlet

Table 6-40. Assignment Queue - Prioritized applied filters

Field Name	Description
Request Types	SC - Conference Line; SC - Communications Device; SC - Network Access; SC - Software Procurement; SC - VPN Access; SC - Hardware Procurement; SC - Phone and Voicemail
Demand Set	Service Catalog Demand Set
Request Group	Service Catalog
Order by	Priority

Service Request Pipeline Portlet

Displays open services that are in workflow steps preceding fulfillment.



Request No	Service Name	Request Status	Recipient Department	Required By Date	Estimated Delivery Date	Scheduled Finish Date
32519	Data Pack Unlimited	Pending Manager Approval	Finance	Oct 17, 2006	Oct 17, 2006	Oct 17, 2006
32513	PC Lockdown Kit	Pending Manager Approval		Oct 18, 2006	Oct 18, 2006	Oct 18, 2006
32512	Lan Cable - 20 ft.	Pending Manager Approval		Oct 18, 2006	Oct 18, 2006	Oct 18, 2006
32511	MS Office Package	Pending Manager Approval		Oct 20, 2006	Oct 20, 2006	Oct 20, 2006
32510	Mouse - USB	Pending Manager Approval		Oct 18, 2006	Oct 18, 2006	Oct 18, 2006

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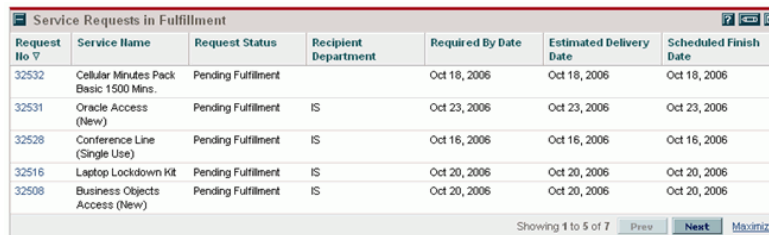
Figure 6-30. Service Request Pipeline portlet

Table 6-41. Service Request Pipeline applied filters

Field Name	Description
Request Types	SC - Conference Line; SC - Communications Device; SC - Network Access; SC - Software Procurement; SC - VPN Access; SC - Hardware Procurement; SC - Phone and Voicemail
Request Status	In Progress; Pending Requestor Info; Pending Manager Approval; Pending Level 1 Approval; Pending Level 2 Approval

Service Requests in Fulfillment Portlet

Displays open services that are in fulfillment.



Request No	Service Name	Request Status	Recipient Department	Required By Date	Estimated Delivery Date	Scheduled Finish Date
32532	Cellular Minutes Pack Basic 1500 Mins.	Pending Fulfillment		Oct 18, 2006	Oct 18, 2006	Oct 18, 2006
32531	Oracle Access (New)	Pending Fulfillment	IS	Oct 23, 2006	Oct 23, 2006	Oct 23, 2006
32528	Conference Line (Single Use)	Pending Fulfillment	IS	Oct 16, 2006	Oct 16, 2006	Oct 16, 2006
32516	Laptop Lockdown Kit	Pending Fulfillment	IS	Oct 20, 2006	Oct 20, 2006	Oct 20, 2006
32508	Business Objects Access (New)	Pending Fulfillment	IS	Oct 20, 2006	Oct 20, 2006	Oct 20, 2006

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Figure 6-31. Service Requests in Fulfillment portlet

Table 6-42. Service Requests in Fulfillment applied filters

Field Name	Description
Request Types	SC - Conference Line; SC - Communications Device; SC - Network Access; SC - Software Procurement; SC - VPN Access; SC - Hardware Procurement; SC - Phone and Voicemail
Request Status	Pending Fulfillment; Pending Fulfillment Details

Closed Service Requests (last 60 days) Portlet

Displays open services that are closed in the last 60 days.

Request No	Service Name	Request Status	Fulfillment Status	Recipient Department	Required By Date	Actual Finish Date
32521	Network Access	Complete	Fulfilled	Finance	Oct 19, 2006	Oct 15, 2006
32518	Blackberry	Complete	Fulfilled	Finance	Oct 20, 2006	Oct 15, 2006
32514	VPN Access	Cancelled			Oct 20, 2006	
32428	MS Access	Complete	Fulfilled	Finance	Oct 26, 2006	Oct 12, 2006
32292	Laptop - Model 2	Complete	Fulfilled		Oct 12, 2006	Oct 8, 2006

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Figure 6-32. Closed Service Requests portlet

Table 6-43. Closed Service Requests applied filters

Field Name	Description
Request Types	SC - Conference Line; SC - Communications Device; SC - Network Access; SC - Software Procurement; SC - VPN Access; SC - Hardware Procurement; SC - Phone and Voicemail
Request Status	Cannot Fulfill; Cancelled; Complete

Average Feedback Within Fixed Time Frame Portlet

Line chart showing the monthly average of all feedback scores for each type of service request. This portlet can be filtered to show requests created over a specific date range.



Figure 6-33. Average Feedback Within Fixed Time Frame portlet

Average Feedback Within Rolling Window Portlet

Line chart showing the monthly average of all feedback scores for each type of service request. This portlet is filtered to show data from previous months relative to the current date.



Figure 6-34. Average Feedback Within Rolling Window portlet

SC - Count of Requests by Priority Portlet

Compare the number of Critical, High, Medium, and Low priority requests between each type of Service Request.

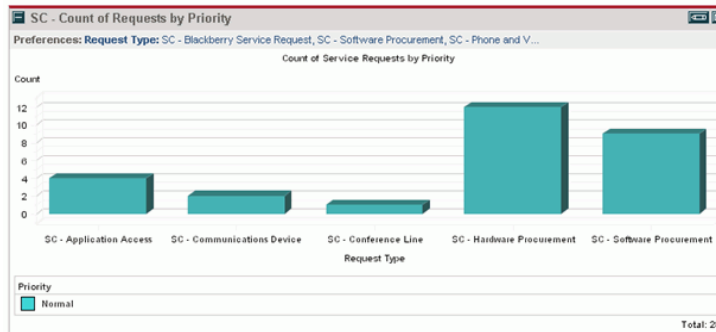


Figure 6-35. SC - Count of Request by Priority portlet

My Order Details Portlet

Lists all Service Catalog orders and all of the service items of each order, requested by a user. The portlet does not distinguish between those orders requested by the user and those orders requested for the user by someone else.

Orders	Status	Date Submitted	Estimated Delivery
Order #30000	In Progress	10/19/06	
S17 - 30330	New	10/19/06	10/20/06
Order #30001 (Requested by me for Demo User)	In Progress	10/19/06	
S17 - 30332	New	10/19/06	10/20/06
Order #30002	In Progress	11/2/06	
S17 - 30510	New	11/2/06	11/3/06
Order #30040	In Progress	10/25/06	
Laptop - Model 1 - 30392	Pending Manager Approval	10/25/06	11/2/06
Lan Cable - 10 ft. - 30420	Pending Manager Approval	10/25/06	10/31/06
<i>(This order contains more items on the next page...)</i>			

Showing 1 to 5 of 15 items [Prev](#) [Next](#) [Maximize](#)

Figure 6-36. My Order Details portlet

Table 6-44. My Portlet Details filter fields (page 1 of 2)

Field Name	Description
Order Status	<p>The status of the order. The possible statuses are:</p> <ul style="list-style-type: none"> • In Progress • Complete <p>Either In Progress or Complete must be selected. The default value is In Progress.</p>
Order Submitted Before	<p>Show orders submitted before the specified date. The default value is blank.</p>
Order Submitted After	<p>Show orders submitted after the specified date. If Order Submitted Before is specified, this date should be later than the Order Submitted Before date.</p>
Show Only	<p>Show only the following orders:</p> <ul style="list-style-type: none"> • Orders requested by me • Orders requested for me • All my Orders <p>The default value is All my Orders. The Show Only field cannot be left blank.</p>
Sort By	<p>Sort the portlet listings by the selected sorting parameter. Sorting parameters include the following:</p> <ul style="list-style-type: none"> • Order Number • Order Status • Date Submitted
Ascending and Descending	<p>The radio buttons Ascending and Descending set the Sort By order to ascending or descending order. The default is Ascending.</p>

Table 6-44. My Portlet Details filter fields (page 2 of 2)

Field Name	Description
Items Displayed	Items Displays sets the number of items displayed in the portlet's normal view. The number of items displayed should be set to six or higher. The default is ten (10).
Items Displayed in Maximized View	Items Displays in Maximized View sets the number of items displayed in the portlet's maximized view. The default is twenty-five (25).

Service Catalog Content Reports

This section details the key reports that are included in the Mercury Service Catalog content release.

Service Catalog Requests Report

This report is intended to provide a cumulative view of orders placed through Service Catalog. With this report, you can:

- View the details of one or more requests.
- View the details of all the fields within each request.
- Create advanced external reports or data extracts for Microsoft Excel.

This report depicts 65 parameters related to Service Catalog orders, such as: Request ID, Service Name, Catalog Name, Status, Expected Delivery Date, Estimated Delivery Date, Credentials of Recipient and its manager, and so on.

MERCURY Close Window X

Submit Report: Service Catalog Requests Report

Report Parameters

Request Creation Date Low:

Request Creation Date High:

Catalog Name:

Service Name:

Request Status:

Service Department:

Priority:

Recipient:

Recipient Department:

Recipient Manager:

Service Owner:

Fulfillment Owner:

Escalation Owner:

Scheduled Start Date Low:

Scheduled Start Date High:

Scheduled Finish Date Low:

Scheduled Finish Date High:

Actual Start Date Low:

Actual Start Date High:

Actual Finish Date Low:

Actual Finish Date High:

Fulfillment Status:

Scheduling

Run Report Immediately

Run Report On:

Repeat Every Hours Until

Send email to: when report is finished

Advanced Notifications

Close Window X

Figure 6-37. Service Catalog Request report fields

How to run the report:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Reports**.
3. Click **New Report**.
4. Select **Service Catalog Requests Report**.
5. Click **Submit**.

Request Id	Catalog Name	Service Name	Item Short Description	Service Requested By	Required By Date	Request Status	Request No.	Request Creation Date	P.
32290	IT Service Catalog	PC - Standard	PC - Standard	Admin User	2006-10-10 00:00:00	Complete	32290	2006-10-08 18:04:13	N
32291	IT Service Catalog	Laptop - Model 2	Laptop - Model 2	Admin User	2006-10-09 00:00:00	Rejected	32291	2006-10-08 18:18:32	N
32292	IT Service Catalog	Laptop - Model 2	Laptop - Model 2	Admin User	2006-10-12 00:00:00	Complete	32292	2006-10-08 18:21:24	N
32367	IT Service Catalog	MS Access	MS Access	Admin User	2006-10-03 00:00:00	Pending Fulfillment	32367	2006-10-10 19:37:27	N
32392	IT Service Catalog	Hardware	Hardware	Admin User	2006-10-18 00:00:00	Pending Manager Approval	32392	2006-10-11 03:51:56	N
32400	IT Service Catalog	Laptop Bundle - Deluxe	Laptop Bundle - Deluxe	Russ King	2006-10-18 00:00:00	Pending Manager Approval	32400	2006-10-11 10:25:09	N
32401	IT Service Catalog	Lan Cable - 10 ft	Lan Cable - 10 ft	Russ King	2006-10-16 00:00:00	Pending Manager Approval	32401	2006-10-11 10:26:43	N
32402	IT Service Catalog	Laptop Lockdown Kit	Laptop Lockdown Kit	Russ King	2006-10-18 00:00:00	Pending Manager Approval	32402	2006-10-11 10:27:05	N
32403	IT Service Catalog	Mouse - USB	Mouse - USB	Russ King	2006-10-16 00:00:00	Pending Manager Approval	32403	2006-10-11 10:27:05	N

Service Catalog Content Database Objects

SC_Utilities is a package of functions that support advanced processing such as field updates and calculations during the workflow execution and rules processing for the different service item Requests within Mercury Service Catalog.

The following SC_Utilities functions are provided in Service Catalog:

Sc_Update_Assigned_To

Function Sc_Update_Assigned_To updates the value in the **Assigned To** field with the latest value of the approver during the workflow execution at each of the approval step.

```
FUNCTION Sc_Update_Assigned_To
(VAR_REQUEST_ID KCRT_REQUESTS.REQUEST_ID%TYPE, TEMP_ID VARCHAR2,
TEMP_NAME VARCHAR2, TEMP_USER_ID VARCHAR2)
RETURN VARCHAR2
```

Sc_Update_Actual_Delvdate

Sc_Update_Actual_Delvdate sets the Actual Delivery date when a Service Request exits fulfillment. The function also updates the Service Satisfied, Demand Satisfied, and Actual Finish dates.

```
FUNCTION Sc_Update_Actual_Delvdate
(P_REQUEST_ID IN NUMBER)
RETURN VARCHAR2
```

Sc_Set_Fulf_Queue_Date

Sc_Set_Fulf_Queue_Date updates the **Fulfillment Queue Date** field with the system date and the function is called when a service item request reaches the Fulfillment Step. So basically this function stores the date on which the service request enters fulfillment.

```
FUNCTION Sc_Set_Fulf_Queue_Date
(P_REQUEST_ID IN NUMBER)
RETURN VARCHAR2
```

Sc_Update_Reject_Date

Sc_Update_Reject_Date updates the **Reject Date** field with the system date if a particular service item request is rejected at the respective step of the workflow.

```
FUNCTION Sc_Update_Reject_Date
(P_REQUEST_ID IN NUMBER)
RETURN VARCHAR2
```

SC_ED

SC_ED returns the Expected Duration in the Service Request created based on a combination of priority, service item name and the request type ID token.

```
FUNCTION SC_ED
(P_PRIORITY_CODE IN VARCHAR2, P_SERVICE_NAME IN VARCHAR2, P_
REQUEST_TYPE_ID IN VARCHAR2)
RETURN VARCHAR2
```

SC_FILL_RTNAME

SC_FILL_RTNAME is used to populate and update the request type name in the **Request Type Name** field.

```
FUNCTION SC_FILL_RTNAME
(REQ_ID NUMBER)
RETURN VARCHAR2
```

Sc_Fulfillment_Status

Sc_Fulfillment_Status sets the **Fulfillment Status** field based on the selected transition from Fulfillment step such that the function updates the field with the action being taken by the fulfillment owner.

```
FUNCTION Sc_Fulfillment_Status
(P_FULFILLMENT_STATUS IN VARCHAR2, VP_FULFILLMENT_STATUS IN
VARCHAR2, P_REQUEST_ID IN NUMBER)
RETURN VARCHAR2
```

Sc_Next_Working_Day

Sc_Next_Working_Day returns the next working date in case the request has been created on a Non Working Day. So this function instead of considering the Non Working Day as the starting date returns the next working day after the Non Working Day.

```
FUNCTION Sc_Next_Working_Day
(P_REQUEST_CREATION_DATE IN VARCHAR2)
RETURN DATE
```

SC_EST_SCH_DATE

SC_EST_SCH_DATE calculates the Estimated and Scheduled Start Dates of the service request based on the values of Required By Date, Priority, Service Item Name, Request Type ID token, and Creation Date.

```
FUNCTION SC_EST_SCH_DATE
(REQD_BY_DATE VARCHAR, PRIORITY VARCHAR, SERVICE_NAME VARCHAR,
REQUEST_TYPE_ID VARCHAR, P_REQUEST_CREATION_DATE VARCHAR)
RETURN VARCHAR2
```

SC_EST_DELV_DATE

SC_EST_DELV_DATE calculates the Estimated and Scheduled Delivery Dates of the service request based on the values of Required By Date, Priority, Service Item Name, Request Type ID token, and Creation Date.

```
FUNCTION SC_EST_DELV_DATE
(REQUIRED_BY_DATE VARCHAR, PRIORITY_CODE VARCHAR, SERVICE_NAME
VARCHAR, REQUEST_TYPE_ID VARCHAR, P_REQUEST_CREATION_DATE
VARCHAR)
RETURN VARCHAR2
```

Sc_Fulfillment_Accepted

Sc_Fulfillment_Accepted updates the **Fulfillment Status** field in case the Requestor rejects the fulfillment by a **Pending Rework** value and updates a value **No** in **Requestor Acceptance - First Time** field.

```
FUNCTION Sc_Fulfillment_Accepted
(P_FULFILLMENT IN VARCHAR, P_REQUEST_ID IN NUMBER)
RETURN VARCHAR2
```

Sc_Req_By_Date

Sc_Req_By_Date is used inside function SC_EST_DELV_DATE for calculating the next working date in case the Required By Date coming inside function SC_EST_DELV_DATE falls on any of the non working day.

```
FUNCTION Sc_Req_By_Date
(P_REQ_BY IN VARCHAR2)
RETURN VARCHAR2
```

Sc_Update_Escalation_Flag

Sc_Update_Escalation_Flag updates a value **Yes** in the **Request Escalated** field whenever at any point of the workflow a service item request has been escalated.

```
FUNCTION Sc_Update_Escalation_Flag
(P_REQUEST_ID IN VARCHAR2)
RETURN VARCHAR2
```

Sc_Blank_Authorized_To_Cancel

Sc_Blank_Authorized_To_Cancel blanks the **Authorized To Cancel** field and deletes its token from the database so that the cancel button is not visible to the service requestor from the Fulfillment Step and ahead in the workflow.

```
FUNCTION Sc_Blank_Authorized_To_Cancel
(P_REQUEST_ID IN VARCHAR2, P_AUTHORIZED_TO_CANCEL IN VARCHAR2)
RETURN VARCHAR2
```

Sc_Fulfillment_Rejected

Sc_Fulfillment_Rejected which sets the field **Requestor Acceptance - First Time** with a value **Yes** when the Service Requestor accepts the fulfillment.

```
FUNCTION Sc_Fulfillment_Rejected
(p_request_ID IN NUMBER)
RETURN VARCHAR
```

Sc_Update_Error_Message

Sc_Update_Error_Message returns a string in case a Required By Date is not feasible within the SLA Time Frame.

```
FUNCTION Sc_Update_Error_Message  
(P_required_date IN VARCHAR,P_request_type_name IN VARCHAR,P_  
creation_date IN VARCHAR,P_priority_store IN VARCHAR,P_service_  
name IN VARCHAR)  
RETURN VARCHAR
```


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