HP Service Manager

Software Version: 9.41

For the supported Windows® and UNIX® operating systems

Request Management help topics for printing

Document Release Date: September 2015
Software Release Date: September 2015

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be present in this PDF version. Those topics can be successfully printed from within the online help.

Contents

Request Management user roles

The Request Management module has the following user roles:

Requestor

The Requestor user role has the following responsibilities:

- Initiate a request through Request Management and search and view request records.

To execute this role, the Requestor has following tasks available:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on page 18	• "Open a quote" on page 19
"Service Request Approval (SO 3.2)" on page 23	
"Service Request Provisioning (SO 3.3)" on page 26	
"Service Request Validation and Closure (SO 3.4)" on page 27	
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Request Coordinator

The Request Coordinator user role has the following responsibilities:

- Coordinate requests. May also be responsible for receiving things into inventory.

To execute this role, the Request Coordinator has following tasks available:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on page 18	• "Open a quote" on page 19 • "Associate a request with a related record" on page 21 • "Open a related record" on page 22
"Service Request Approval (SO 3.2)" on page 23	• "Access approvals from the search screens" on page 24 • "View approval type group options" on page 26
"Service Request Provisioning (SO 3.3)" on page 26	
"Service Request Validation and Closure (SO 3.4)" on page 27	• "Close an order" on page 28
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Request Reviewer

The Request Reviewer user role has the following responsibilities:

- Evaluate a Request Management quote for potential errors. A reviewer may not necessarily have approval rights.

To execute this role, the Request Reviewer has following tasks available:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on page 18	• "Open a quote" on page 19 • "Associate a request with a related record" on page 21
"Service Request Approval (SO 3.2)" on page 23	• "Access approvals from the search screens" on page 24 • "View approval type group options" on page 26
"Service Request Provisioning (SO 3.3)" on page 26	
"Service Request Validation and Closure (SO 3.4)" on page 27	
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Request Approver

The Request Approver user role has the following responsibilities:

- Approve requests before they can be processed and filled.

To execute this role, the Request Approver has following tasks available:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on page 18	• "Open a quote" on page 19 • "Associate a request with a related record" on page 21 • "Open a related record" on page 22
"Service Request Approval (SO 3.2)" on page 23	• "Access approvals from the search screens" on page 24 • "View approval type group options" on page 26
"Service Request Provisioning (SO 3.3)" on page 26	

ITIL workflow	Tasks
"Service Request Validation and Closure (SO 3.4)" on page 27	
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Request Helpdesk Tech

The Request Helpdesk Tech user role has the following responsibilities:

- Provide helpdesk assistance for opening new item requests.
- Process service requests.
- Oversee the request process through its cycle back to the customer.

To execute this role, the Request Helpdesk Tech has following tasks available:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on page 18	• "Open a quote" on page 19 • "Associate a request with a related record" on page 21
"Service Request Approval (SO 3.2)" on page 23	
"Service Request Provisioning (SO 3.3)" on page 26	
"Service Request Validation and Closure (SO 3.4)" on page 27	
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Request Procurement Manager

The Request Procurement Manager user role has the following responsibilities:

- Process requests through the system.
- May be required to update inventory data when requested items arrive.

To execute this role, theRequest Procurement Manager has following tasks available:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on page 18	
"Service Request Approval (SO 3.2)" on page 23	
"Service Request Provisioning (SO 3.3)" on page 26	• "Close an order" on page 28
"Service Request Validation and Closure (SO 3.4)" on page 27	
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Request Administrator

The Request Administrator user role has the following responsibilities:

- Administer Request Management applications.

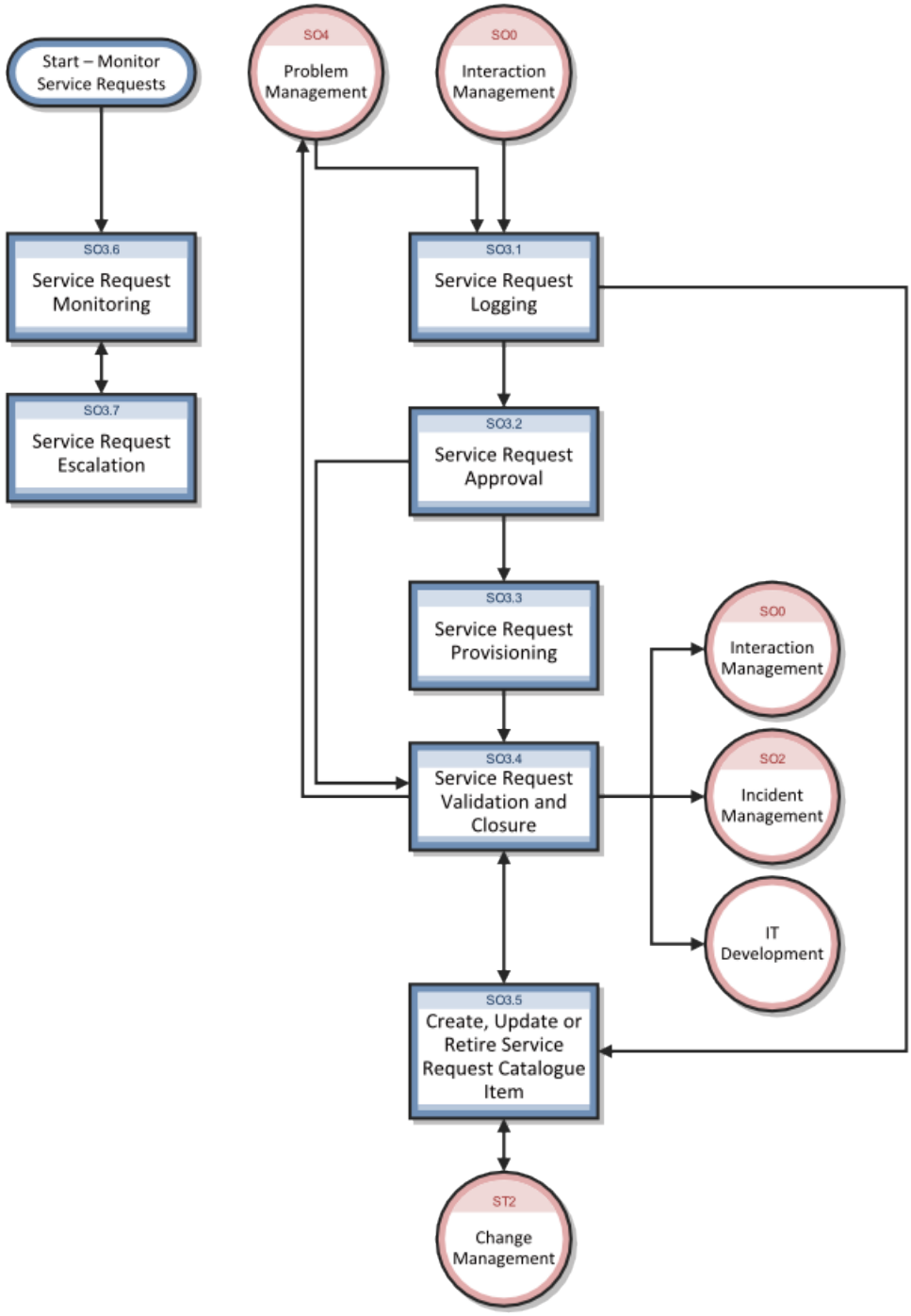
To execute this role, the Request Administrator has following tasks available:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on page 18	• "Open a quote" on page 19 • "Associate a request with a related record" on page 21 • "Open a related record" on page 22
"Service Request Approval (SO 3.2)" on page 23	• "Access approvals from the search screens" on page 24
"Service Request Provisioning (SO 3.3)" on page 26	
"Service Request Validation and Closure (SO 3.4)" on page 27	• "Close an order" on page 28

ITIL workflow	Tasks
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	• "Add a master category" on page 30 • "Add a line item category" on page 32 • "Access a line item view" on page 33 • "Designate a model file as a phantom" on page 116
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Request Management workflows and user tasks

The Request Management process includes the activities required to select items from the menu and submit a service request, to give financial and business approvals, to provision, and to fulfil service requests. It is responsible for ensuring that a IT support is offered for self-help practices and requests can be effectively fulfilled after needed approvals.



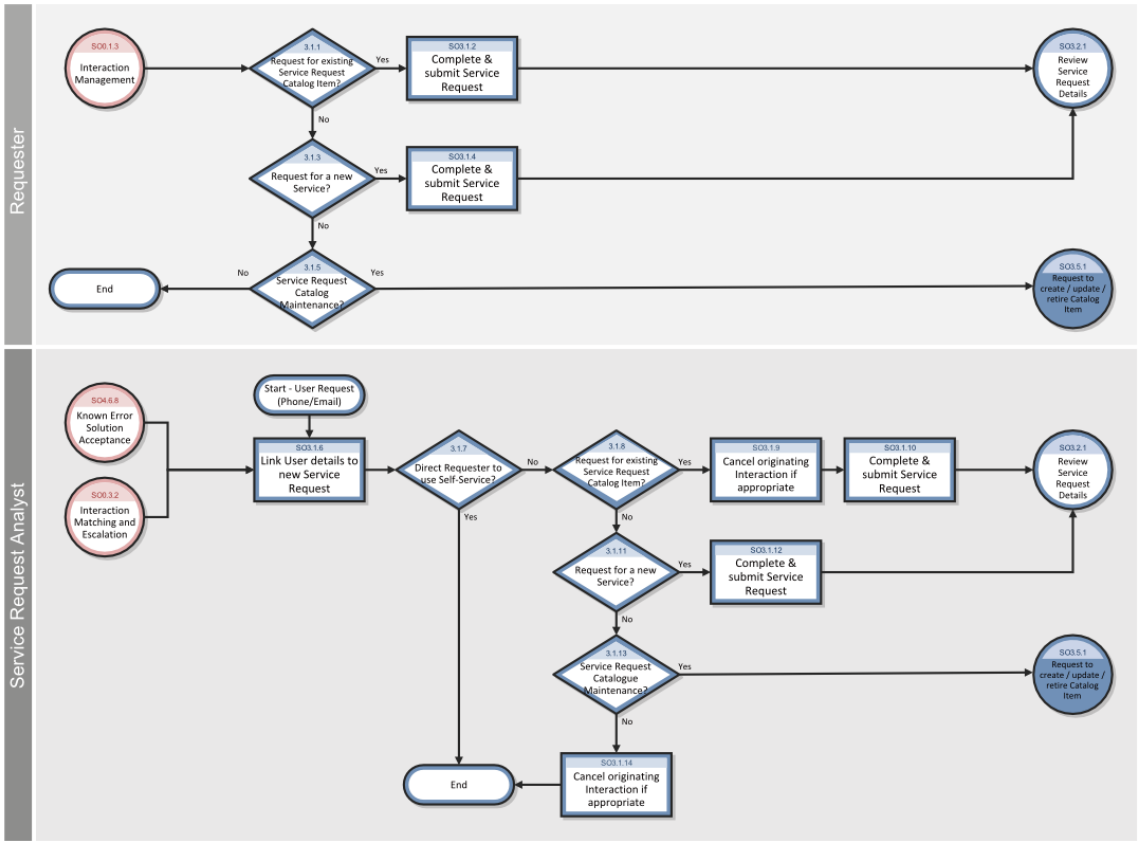
The Request Management process consists of the following workflows and tasks:

ITIL workflow	Tasks
"Service Request Logging (SO 3.1)" on the next page	• "Open a quote" on page 19 • "Associate a request with a related

ITIL workflow	Tasks
	record" on page 21 • "Open a related record" on page 22
"Service Request Approval (SO 3.2)" on page 23	• "Access approvals from the search screens" on page 24 • "View approval type group options" on page 26
"Service Request Provisioning (SO 3.3)" on page 26	
"Service Request Validation and Closure (SO 3.4)" on page 27	• "Close an order" on page 28
"Create, Update or Retire Service Request Catalog Item (SO 3.5)" on page 30	• "Add a master category" on page 30 • "Add a line item category" on page 32 • "Access a line item view" on page 33 • "Designate a model file as a phantom" on page 116
"Service Request Monitoring (SO 3.6)" on page 34	
"Service Request Escalation (SO 3.7)" on page 35	

Service Request Logging (SO 3.1)

The Service Request Logging process starts when a Requester uses Self Service Ticketing or the Service Desk to log appropriate Service Requests. A Service Request submitted by the Requester can be a request for existing Service Request Catalog Item, a request for a new service, or an amendment to the Service Request Catalog. The Service Request Analyst needs to link User Details to the new Service Request, analyze the request, and then decide what to do next. As a result of the Service Request Logging process, a Service Request will be submitted. An originating interaction could be cancelled if needed.



For more information on this process, refer to the HP Service Manager Processes and Best Practices Guide.

Open a quote

Applies to User Roles:

Request Help Desk Tech

Requestor

Request Coordinator

Request Approver

Request Administrator

System Administrator

To open a service request:

1. Click **Request Management** > **Quotes** > **Create New Quote**.

2. Select one of the categories for this request.
   - Customer Procurement Requests
   - Human Resources
   - Employee Office Move Process

3. If you selected **Customer Procurement Requests**, perform the following steps:
   a. Select from the **Master Catalog**.
   b. Select the category of the item you are requesting.
   c. Select the item(s) you wish to request. A list of the item(s) you selected opens and shows the total cost.
   d. Click **Add Items** to add more items to your request.
   e. Click **Submit Request**.
   f. Fill in the required fields (such as requested delivery date and reason for request) in the **New Request** form.

4. If you selected **Human Resources**, perform the following steps:
   a. Select a category. You can choose to select defaults and also to modify the quantity.
   b. Click **Add Items** to add more items to your request.
   c. Click **Submit Request**.
   d. Fill in the required fields (such as start date, department, and manager) in the human resources form.

5. If you selected **Employee Office Move Process**, perform the following steps:
   a. Select from the available list of options. You can choose to select defaults and also to modify the quantity. A summary list of your selections opens and shows total cost.
   b. Click **Add Items** to add more items to your request.
   c. Click **Submit Request**.

d. Fill in the required fields (such as first name, last name, and effective date) in the employee office move request form.

6. Click **Save**. Service Manager creates the new quote.

Associate a request with a related record

Applies to User Roles:

Request Coordinator

Request Reviewer

Request Approver

Request Helpdesk Tech

System Administrator

You can associate a Request Management quote with an existing service desk interaction, incident, or change request. Before associating a quote with another record, make note of the record number. For example, an incident record begins with the prefix IM. The record number would look like IM1001.

In the following example, associate a Request Management quote with an Incident Management incident record. The procedure is the same for associating other types of records.

1. Click **Request Management** > **Quotes** > **Search Quotes** or **Quote Queue** and then click **Search** to open an existing Request Management quote.
2. Click **More** or the More Actions icon, and then select **Related** > **Incidents** > **Associate**.
3. Type the incident number or click **Search** to view the incident search form.
4. Add optional filtering criteria, and then click **Search** again to display an incident record list.
5. Select the incident record you want to associate with the quote record. The incident record number is displayed.
   - Click **OK** to link the incident record to the quote record.
   - Click **Search** to view the incident record search form again. Click **Search** again to redisplay the incident record list.
   - Click **Cancel** to stop the search and exit.

6. Click **Save & Exit**.

   Request Management populates the Related Records section with information about the related incident.

   Note: Record numbers such as incidents (IM1001), changes (C10), and requests (Q1001) are case-sensitive.

Open a related record

Applies to User Roles:

Request Administrator

System Administrator

You can open a Change Management change, Incident Management incident record, or Service Desk interaction from Request Management. The new record is related to an existing quote.

The following example opens an Incident Management incident record. The procedure is the same for opening other types of records.

To open a related record:

1. Click **Request Management** > **Quotes** > **Quote Queue** or **Search Quotes** to access an existing Request Management quote.
2. Add optional search criteria, and then click **Search**.

   A list of quote records opens.
3. Select a target record.
4. Click **More** or the More Actions icon, and then select **Related** > **Incidents** > **Open**.

   Service Manager creates a new incident record and automatically fills in the Incident ID and Title of the new record.
5. Fill in the required fields and the remainder of the incident record, as needed.
6. Click **Save & Exit**.

Note: Depending on the information you provided in the new incident record, a list of potentially related incident records described below may or may not open. If the list does not appear, you will directly go to step 10.

7. A list of potentially related incident records opens. Browse through the related incident records list to see if you can associate the quote to an existing incident record.

8. If an existing incident record is related to the quote:
   a. Click to open this incident, and then click **Edit**.

   b. Click **More** or the More Actions icon, and select **Related** > **Quotes** > **Associate**, enter the current quote number and click **OK**. The quote is associated to the existing incident record.

   c. Click **Save & Exit**, and then **Back** twice. You are returned to the new incident record.

   d. Click **Cancel** to cancel opening the new incident. You are returned to the quote record, and the existing incident record displays in the Related Records section of the quote.

9. If none of the existing incident records is related to the quote, go to step 10.

10. Click **Create New Incident**.
    Note: Depending on the information you provided in the new incident record, a list of potentially related problem records described below may or may not open. If the list does not appear, step 11 is skipped and the new incident record is opened and associated to the quote.

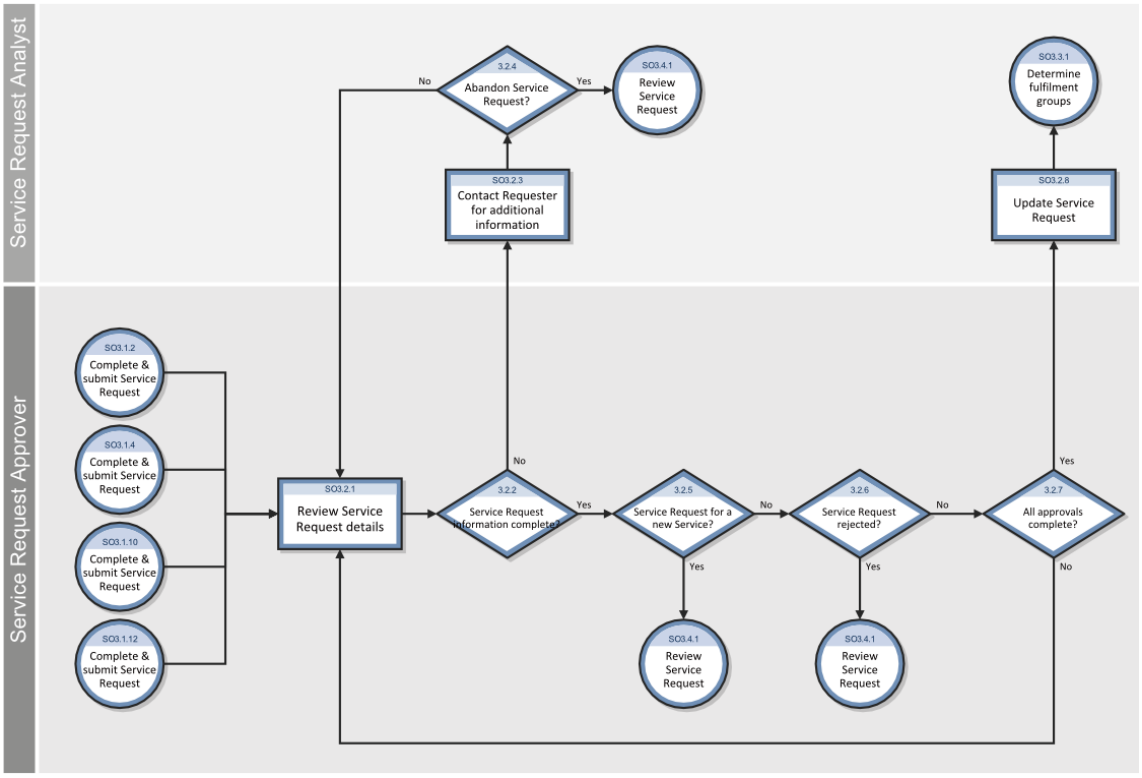
11. A list of potentially related problem records opens. Browse through the related problem records list to see if you can associate the new incident to an existing problem record. Do one of the following:
    - If none of the problem records can be related, click **Continue** to continue with opening the new incident record. The new incident is opened, and the quote is associated to the new record.

    - If a problem record can be related, click the problem record, and then click **link** to link the problem record and continue to browse the other records; or click **linkext** to link the problem record and exit. The new incident is opened with the problem record linked to it, and the quote is associated to the new incident record.

Service Request Approval (SO 3.2)

A service request initiated by the Requester has the request and user information automatically included in the service request. After a service request is logged, the Service Request Approver reviews the Service Request details. If more information is needed, the Service Request Approver will contact

the Requester to complete the information, and then approve or reject the request. Once all approvals have been received, the Service Request Analyst updates the Service Request and make sure all Service Request information is up-to-date.



For more information on this process, refer to the HP Service Manager Processes and Best Practices Guide.

Access approvals from the search screens

Applies to User Roles:

Request Approver

Coordinator

Request Administrator

System Administrator

Approvals can either be approved, retracted, or denied. Pending approvals await one of these actions.

To access approvals from a search screen:

1. Click one of the following:
   - **Request Management** > **Quotes** > **Search Quotes**
   - **Request Management** > **Orders** > **Search Orders**
2. Add optional search criteria, and then click **Search**.

   A record list of quotes or orders opens.

   Note: If you have quotes authority in only one group, the list of current requests for that group opens.

   If you have approval authority for multiple groups, the Approval Group Select dialog box appears. Select the groups that you want to search.

   Request Management places a check mark beside the flagged group boxes and searches for requests currently awaiting approvals for that group. If all groups are checked, all groups are queried.
3. Select the target quote or order record.
4. Open the **Approvals** section, and go to the Current Approvals subsection.

   For the approvals in this quote or order, you see the approval type, approval status, and number of approved.
5. In the **Current Approvals subsection**, click an approval type.
6. Click **More** or the More Actions icon, and choose one of the following:
   - **Approve**
   - **Deny**
   - **Retract**

   The descriptions of these approval actions are as follows:

Action	Description
Approve	Gives authority to proceed with all items listed in the request.
Deny	Denies authority to proceed with all items listed in the request.
Retract	Removes previous approval actions.

7. If you made edits to approvals, click **Save** to save your changes.

View approval type group options

Applies to User Roles:

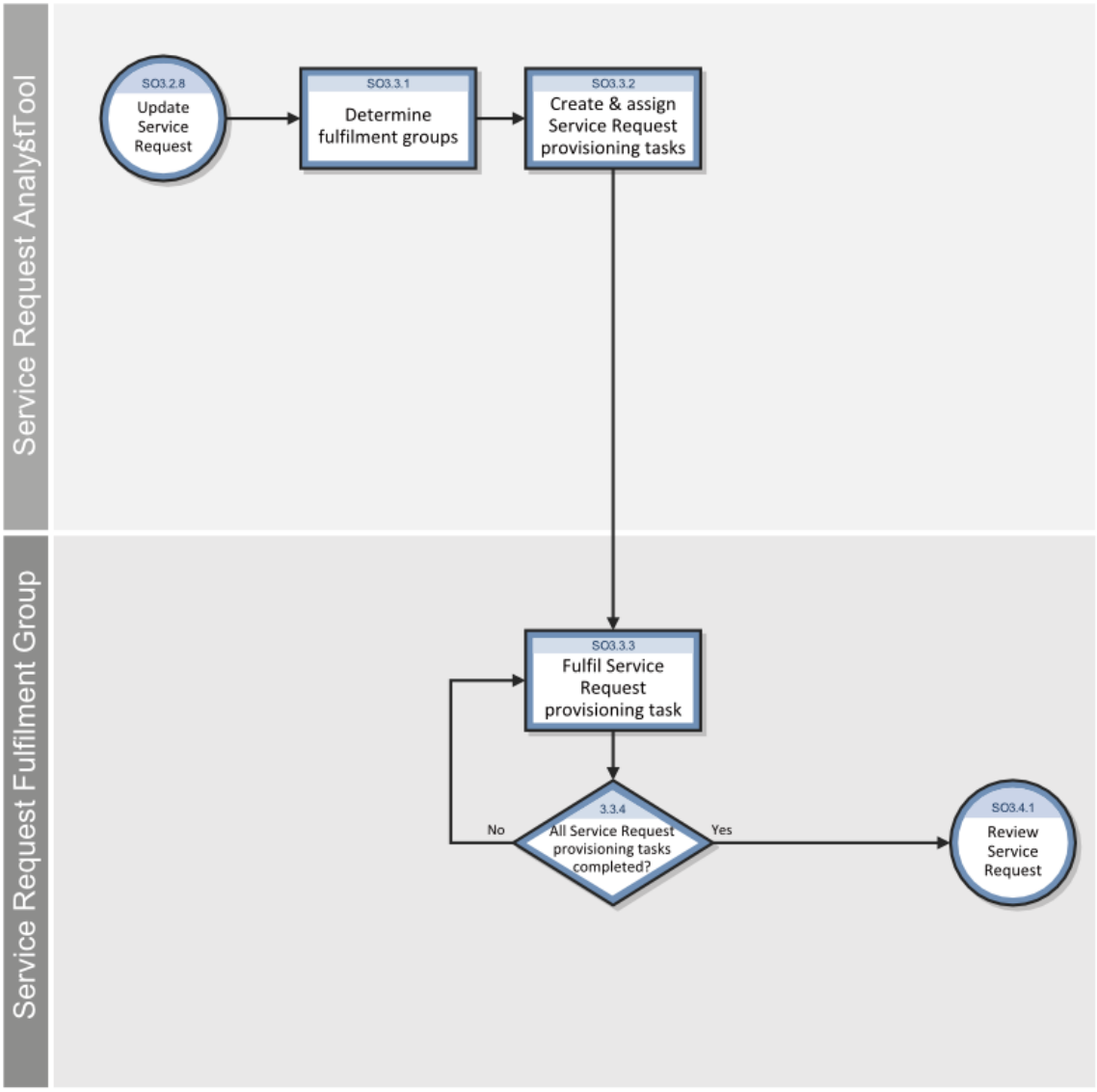
All roles except Self-Service User

To view Approval Type group options:

1. Click **Request Management** > **Quotes** > **Search Quotes** or **Quote Queue** and then click **Search** to open an existing quote record.
2. Open the **Approvals** section.
3. In the Current Approvals subsection, double-click an Approval Type group whose group options you want to view. The Approval form opens.
4. Do one of the following:
   - If the approval type has a status of pending, go to the Currently Pending Approvals area, and click a group listed in the Group/Operator Name field.
   - If the approval type has a status of approved or denied, go to the Completed Approval Actions area, and click a group listed in the Approval Group/Oper field.
5. Click **More** or the More Actions icon, and then select **Override** to view the options.

Service Request Provisioning (SO 3.3)

In the Service Request Provisioning process, the Service Request Analyst identifies which Service Request Group/s is best able to fulfil the Service Request. This step can also be performed by Service Manager. The tool can automatically assign records to the appropriate group based on the record's categorization. After that, Service Request Provisioning tasks are created for the group to fulfil.

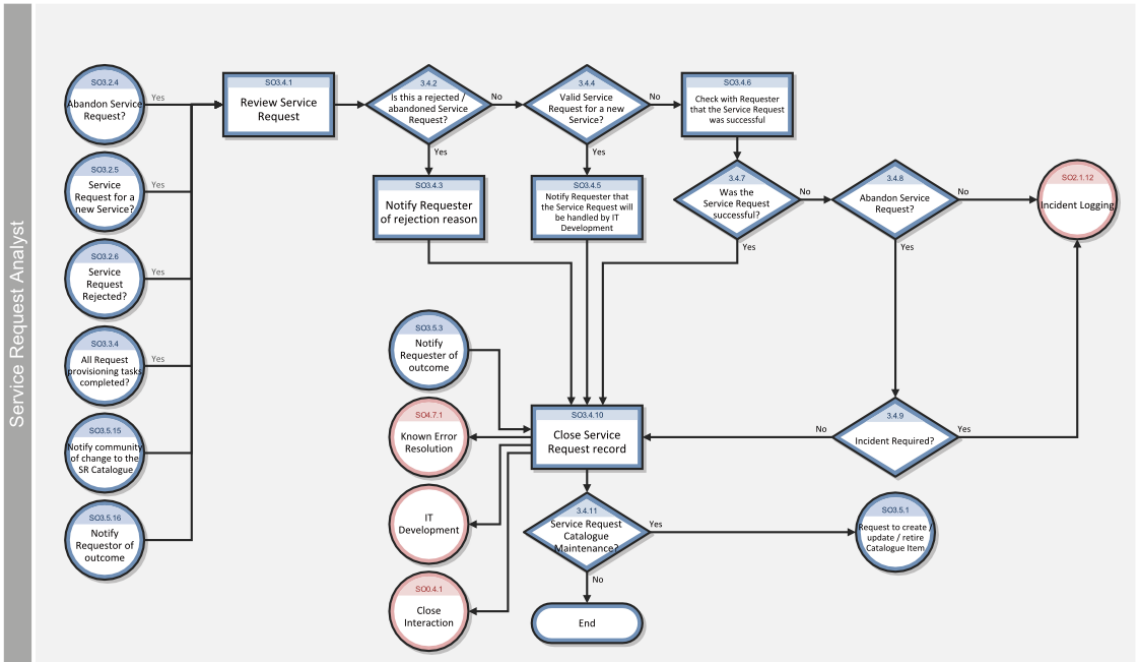


For more information on this process, refer to the HP Service Manager Processes and Best Practices Guide.

Service Request Validation and Closure (SO 3.4)

After a Service Request is approved and fulfilled, the Service Request Analyst starts to review, validate, and then close the request. A Service Request can be closed when the Service Request Analyst finishes one of the following tasks:

- Notify the Requester the rejection reason, if the Service Request is abandoned and rejected.
- Notify the Requester that the Service Request will be handled by IT development after validating the Service Request for a new service.
- Check with the Service Requester that the Service Request is successfully fulfilled.
- Log a incident for the Requester if the Service Request is not successful.



For more information on this process, refer to the HP Service Manager Processes and Best Practices Guide.

Close an order

Service Manager allows you to close an order using the Close Order option even when it has open line items. However, closing an order with open line items will cancel the open line items. Normally, you close an order by closing all the line items of the order after confirming that all the parts have been received or the tasks have been completed. Service Manager automatically closes the order when all the line items are closed.

To close an order:

1. Click **Request Management** > **Orders** > **Search Orders**.
2. Click **Search** to generate a record list.
3. Click a record to view it.
4. Click **More** or the More Actions icon, and select **Line Items**. If the order has more than one line item, a list of line items opens in the upper screen, and an Order Line Item Summary opens in the lower screen. If the order has only one line item, the Order Line Item Summary opens in the whole screen.
5. Check that all line items of the order have been received or their tasks are completed, and then close each open line item.
   - If the line item is a part for which the **Track Receiving?** option is enabled, do the following:
     i. Click **Receive** to begin the receiving process.

        Note: The Receive button is available only for line items for which the **Track Receiving?** option is enabled. To see if this option is enabled for a part, go to **Request Management** > **Maintenance** > **Supporting Files** > **Model**, open the Model record of the part, and then select the **Reorder** tab.

     ii. Verify the receiving information, and then click **OK**.

     iii. Verify and adjust the quantities, and click **Post**.

        Note: The line item quantities are posted to update the **Current Quantities** tab of the Model record of the part.

   - If the **Track Receiving?** option is not enabled for the part, do the following:

     i. Change the Quantity Received to be equal to the Original Quantity.

     ii. Click **Close Line Item**. You can only close a line item that has no outstanding balance.

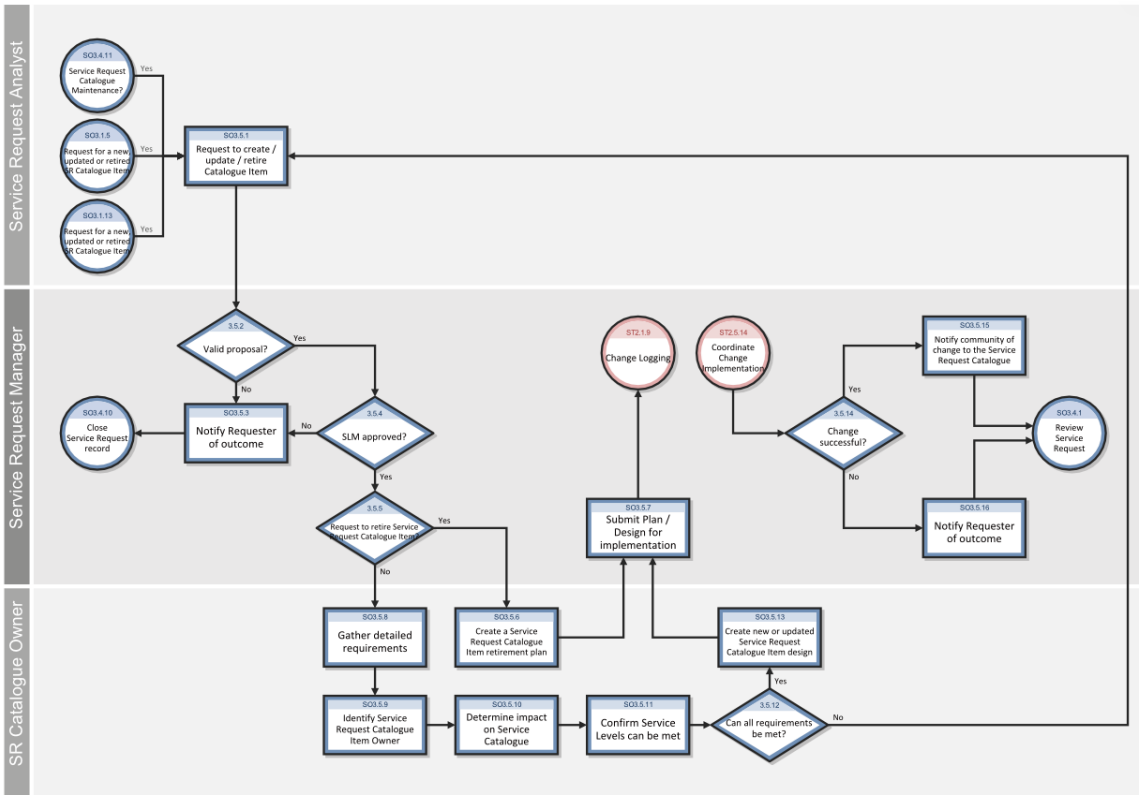
   - If the line item is a service for which the work is completed, click **Close Line Item** to close it.

   Note: Scripts can be used during the close process for the operator to provide further comments about the work performed. The name of the Close Script is displayed on the line item's phase definition. When you click **OK**, the Request Management order summary form opens. A different receiving format can be designated on the line item category phase definition for the part selected from the catalog.
6. Click **Save & Exit**. You are returned to the order record.

Service Manager changes the order status to closed.

Create, Update or Retire Service Request Catalog Item (SO 3.5)

The Service Request Analyst requests to update the Service Request Catalog when the Service Request Catalog Maintenance is needed. Service Request Catalog Owner is responsible for creating a Service Request Catalog Item retirement plan or a updated Service Request Catalog design after making sure all requirements can be met. Once the plan or design is submitted for implementation, it will be managed as part of the Change Management process. The Requester who initiated the Requester and appropriate stakeholders will be notified the change implementation results.



For more information on this process, refer to the HP Service Manager Processes and Best Practices Guide.

Add a master category

User roles:

Request Coordinator

Request Administrator

System Administrator

Categories within Request Management combine items that would normally be listed independently. Categories reduce or eliminate the need to search for items and services.

To add a master category:

1. Click **Request Management** > **Maintenance** > **Administration** > **Master Categories**.
2. Type the required unique **Name** for this master category, and then type a short **Description** of this catalog item (up to 30 characters). Record lists display this description and it should be meaningful for operators.
3. The Availability field determines if the operator can select this category while adding a line item. If the operator needs to have this control, type **true**. Otherwise, the default setting is false when the field is left blank.

   You can use a condition to create a more specific availability control.

   Note: The variable *$lo.ucapex* can be used to search for operator or group capability words and determine whether this master category will be available to particular operators. It can be used in the Availability field as part of a condition, such as the following.

   ```
   index(“Capability words”,$lo.ucapex)>0
   ```

4. The Display Categories field determines if the operator can see the list of line item categories under this master category. If the operator needs to have this control, type **true**. Otherwise, the default setting is false when the field is left blank. If the field is left blank (false), the line item category record list is not displayed; instead, all parts (or line items) with a line item category matching any of this master category’s line item categories are displayed.
5. The Sequence field determines the sequence to sort the list of parts for this category.

   Note: You can modify the sort order within the Sequence field by selecting the category key in the model file.

6. Quote categories determine which quote categories access this master category and display this line item in the catalog. Type the name of this category in the **Quote Categories** field. If left blank, this category will be available for all operator quote categories.

Note: You can return to the record later to add additional quote categories if you do not know the names of the categories at this time.

7. Determine which order categories access this master category and display this line item in the catalog. Type the name of this category in the **Order Categories** field. If left blank (NULL), this category will be available for all operator order categories. The out-of-box system contains five order categories.

   Note: You can return to the record later to add additional order categories, if you do not know the names of the categories at this time.

8. Determine which line item categories are to be available in this master category. Type the name of this category in the **Line Item Categories** field. These are the smaller groupings of products and services, which organize the available pool of resources. Currently there are just over 80 default line item categories. If you leave this field blank, all the line item categories will be available to this master category.

9. Click **Add**.

   The new master category is added.

Add a line item category

User roles:

Request Coordinator

Request Administrator

System Administrator

Line item categories are the building blocks of master categories. The parts of line item categories are individual line items, such as a computer mouse or monitor. Line items include both specific parts and services.

To add a line item category:

1. Click **Request Management** > **Maintenance** > **Administration** > **Line Item Categories** or **Create Line Item Category**.

2. Type the **Name** and **Description** of the category.

3. In the Availability field, type **true** to make the new category visible. If you leave this field blank or type false, then the category is not available.
4. In the QBE format field, type the name of the record list format that you want to use if it is different from the default *ocml.qbe* form.
5. The **List Bitmap** field enables you to add images of your inventory items to the forms. Images are stored in the Service Manager repository and require a GUI client.
6. The Assign Number Before Commit? check box assigns a number to the line item before it opens a confirmation screen (provided that display option is active).
7. Click the first field in the Quote Categories box, and then click **Fill** to generate a list of categories.
8. Select a quote category from the list. The system adds it to the Quote Categories box.
9. Click the first field in the Order Categories field, and then click **Fill** to generate a list of categories.
10. Select an order category from the list. The system adds it to the Order Categories box.

    The Line Item Phase field displays the phase name for the category. Format Control automatically matches this to the existing category name.
11. Click **Add**.

Important Note: This item will not function properly until a phase definition record of the same name is committed to the database.

Note: When you save the new line item category, you need to add an associated phase definition record.

Access a line item view

Applies to User Roles:

Request Coordinator

Request Administrator

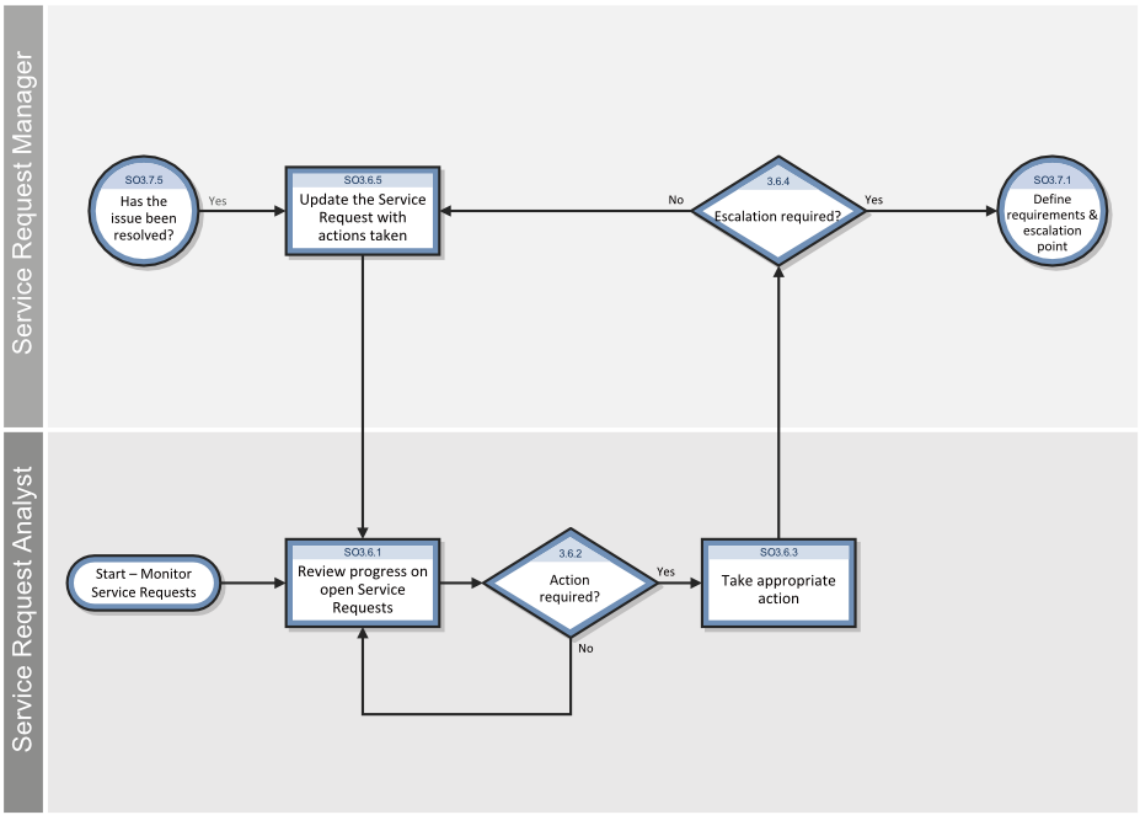
System Administrator

The Line Item view form displays the ordering controls that were set in the Catalog for the part and copied over to the line item during the request process (see Catalog Operations).

1. Click **Request Management** > **Line Items** > **Line Item Queue**.
2. Use search or advanced search to find one or more records.
3. Select a target record to view.
4. To see different views of the data, click **More** or the More Actions icon, and then select **Alternate Forms** to select an alternate line item view.

Service Request Monitoring (SO 3.6)

The Service Request Monitoring process describes the activities to monitor all open Service Requests from initialization to resolution. Service Request Monitoring also determines whether action or escalation is required to meet the target resolution according to the associated SLA. For example, action is needed if requests are greater than 50% of SLA expired. Service Request Monitoring is an ongoing process performed by the Service Request Analyst and the Service Request Manager.



For more information on this process, refer to the HP Service Manager Processes and Best Practices Guide.

Access Request Management reports

Security Roles: Request Manager; Request Coordinator

The Reporting tool in HP Service Manager provides a number of out-of-box reports on the request data in your system. You can view these reports through a dashboard named **Request Overview (Global)**. You can also create your own dashboards to display other reports of your interest.

To access Request Fulfillment reports, follow these steps:

1. Click **Request Management** > **Request Overview**.

   By default, the **Request Overview (Global)** dashboard is displayed.

2. View the reports on the dashboard. For descriptions of these reports, see "Report descriptions and usage" on page 1.

3. If needed, click the **New Dashboard** button to add your own dashboards. For details, see "Create a dashboard" on page 1.

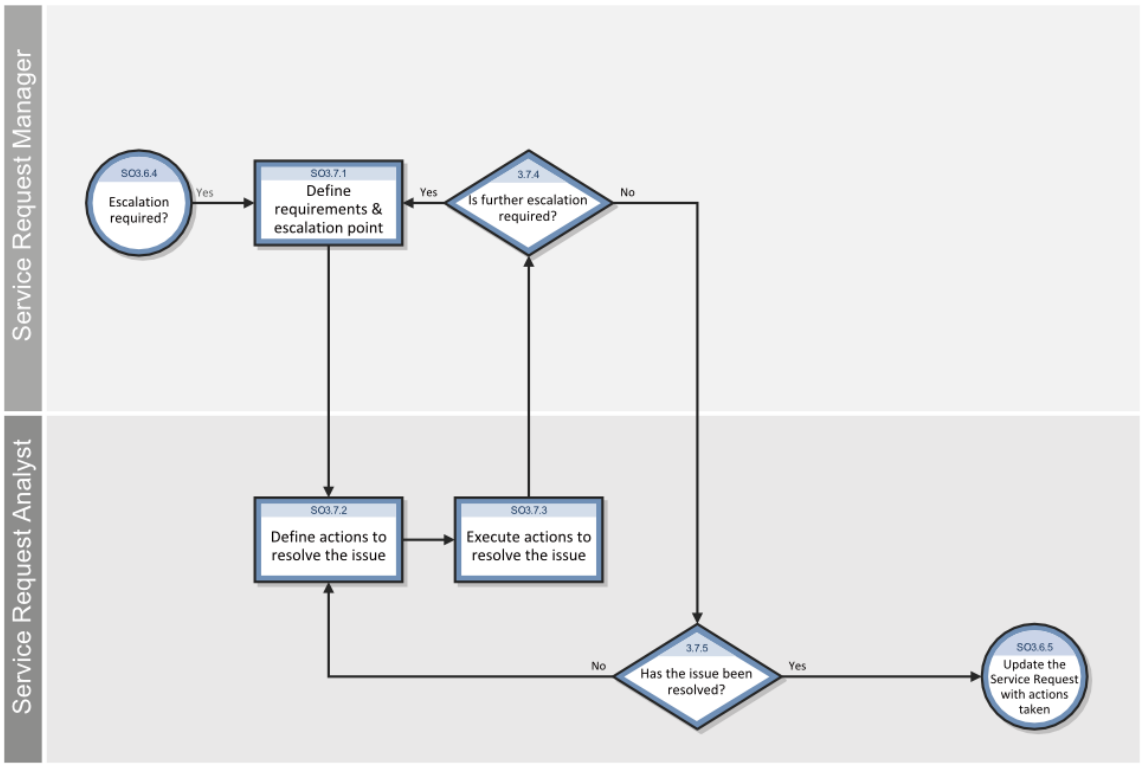
   Your custom dashboards are added to the dashboard list on the toolbar of the dashboard page.

   > **Tip:** You can click **Export** to export the reports on a dashboard to PDF format.

4. Click the **Open dashboard settings** icon on a dashboard to set its properties, or click the **Set as Default Dashboard** button to set it as your default dashboard.

Service Request Escalation (SO 3.7)

When a Service Request Analyst reports to the Service Request Manager the action taken to resolve the issue with the Service Request, the manager determines whether escalation is needed. The Service Request Escalation process starts from the requirements and escalation point defined by the Service Request Manager, and the analyst takes care of defining actions that should be taken and action execution until the issue is resolved.



For more information on this process, refer to the HP Service Manager Processes and Best Practices Guide.

Request Management administration

You can access Request Management administration from the Request Management application. You can configure the Request Management environment, add users, assign profiles, and ensure that individual users have rights that are appropriate for their roles

Security and access

Security in the Request Management process is essential. Most operators only need access to limited areas and items for creating quotes and ordering. Only certain operators should be allowed to approve quotes and orders, mark shipments as received, and respond to operators' requests for items. You can implement rules such as these with Request Management.

Request Management uses several files containing records on individual operators to secure the database and efficiently use quotes, orders, and line items.

Note: If there is a conflict in the settings for a particular operator, the User Profile record settings override the environment settings in Request Management. The category and phase record settings for the functional areas override the User Profile record settings. Ultimately, restrictions established in the category and phase definition records determine operator access privileges.

Request Management User Profile

Administrators assign user access privileges to enable Service Desk operators and others to use integrated Request Management functionality. The administrator often assigns these privileges by creating a user role and assigning that role to a group of users.

A typical user role would be Service Desk Agent. This role has indirect Request Management access. The typical privileges assigned to a user role would be requestor.

A Request Management user also has a profile that specifies security rights and approval groups.

The user profile controls the Request Management function access for users. The system administrator can assign the standard profile to a user, or establish user access with a unique profile.

The system administrator can specify user access for each of the three functional areas of Request Management or use one profile for access to all. If an operator has two profiles (such as one for the Quote area and another for All areas), the specific area profile takes precedence and overrides the All areas profile.

Generally, the standard user has minimal direct access to Request Management. This user has limited data views and limited options within the application. It is best to begin with a more restricted system and expand the options over time, rather than provide an open system and rescind permissions and accessibility to the product options at a later time.

Add a profile

Applies to User Roles:

System Administrator

Request Management profiles enable administrators to selectively assign access and security to users through the interaction of user roles and profiles. You can add Request Management profiles to the out-of-box profiles.

Note: If you are not sure what information is available in the fields on the tabs you select, you can click **Fill** to generate a record list of possible options, and then choose one.

To add a new profile:

1. Click **System Administration** > **Ongoing Maintenance** > **Profiles** > **Request Management Profiles**.
2. In the **Profile Name** field, type the name of the new profile.
3. Select the applicable rights, forms, and request options for the profile, and then click **Add**.
4. If you do not complete all required fields, a series of screens opens. Continue to modify the record to create your new operator and group profile. After you complete each screen, click **Save**.
5. Click **OK**.
6. To apply this and other operator profile record group updates to the applicable group definition records, click **More** or the More Actions icon and select **Rebuild Group**.
7. Click **Save** to save your changes.

To use an existing profile to add a new profile:

1. Click **System Administration** > **Ongoing Maintenance** > **Profiles** > **Request Management Profiles**.
2. Use search or advanced search to find one or more records.
3. Select a profile from the list that most closely matches the profile you want to add.

4. In the **Profile Name** field, type the name of the new profile.
5. Select the applicable rights, forms, and request options for the profile.
6. Continue to modify the record to create your new operator and group profile.
7. Click **Add**.

   Caution: Make sure that you do not click **Save** because doing so will replace the existing profile with the new profile you are attempting to add.
8. Click **OK**.
9. To apply this and other operator profile record group updates to the applicable group definition records, right-click in the form (for Windows clients only) or click **More** to select **Rebuild Group**.
10. Click **Save** to save your changes.

Edit a profile

Applies to User Roles:

System Administrator

As the System Administrator, you can edit Request Management profiles. You can edit settings, such as the basic options, alert options, and approval options.

Note: You must set profile privileges separately for each record type.

To update a Request Management profile record:

1. Click **System Administration** > **Ongoing Maintenance** > **Profiles** > **Request Management Profiles**.
2. Add optional search criteria, and then click **Search**.

   A list of profile records opens.
3. Select a record from the list.
4. Review the restrictions for that profile and determine the exact restrictions or permissions you wish to enable for the user. Add or change the applicable information on the form.

5. When you are finished with your updates, click **Save**.
6. Click **OK**.

Environment records

Within Request Management, environment records define the overall operating environment and establish features for each functional area: quotes, line items, and orders. The environment records contain information specific to each operator, including the following:

- Access rights
- Numbering format and length
- Enabled/disabled alerts and events

Environment records are required to access each functional area within Request Management.

Edit environment records

The Request Management Environment record defines options that enable or disable Request Management application functionality for all Request Management users. The Request Management Environment record has default settings. However, you can configure these settings to meet your business needs.

To configure the Request Management environment settings for line items, orders, or quotes, do the following.

1. As a System Administrator, click the following to open application environment records:
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Line Item Environment**
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Order Environment**
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Quote Environment**

   Or click the following from Request Management:

- **Request Management** > **Maintenance** > **Administration** > **Line Item Environment**
- **Request Management** > **Maintenance** > **Administration** > **Order Environment**
- **Request Management** > **Maintenance** > **Administration** > **Quote Environment**

2. Select new options or clear default options. Your changes redefine the Request Management environment for all users.
3. Determine the numbering format to establish for quotes, line items, or orders.
4. Decide on a separator character between your main quote or order number and the included line items or parts, such as Q1234-001 and O2345-100.
5. Determine the length of the unique number to be added (this will determine how often you may need to reset your numbers).
6. Stockroom option: When a line item has been completely received, select whether it should be marked as "In Stock" or closed.
7. When you have finished making your changes, click **Save** and **OK**.

Number controls

Each of the first three following options retrieves the unique sequential number according to the *ocmq*, *ocmo*, and *ocml* records in the number file. The number.reset application can be used to reset this unique number at the beginning of each year, or more often if necessary. These number controls determine how your quotes will be numbered.

Option	Description
Yr/Unique No (YYNNN)	The current year (system-calculated), followed by a unique sequential number.
Yr-Mo/Unique No (YYMMNNN)	The current year and current month (system-calculated), followed by a unique sequential number.
Julian/Unique No (YYDDDNNN)	The current Julian date (system-calculated), followed by a unique sequential number.
Unique Number Only	A unique number without prefixes or suffixes, retrieved from the number file (ocmq, ocml or ocmo classes). Separator causes a separator character to appear between your main quote or order number and the included line items or parts, such as, Q1234-001.

Option	Description
	Unique Number Length specifies the length of the unique number to be added (determines how often you may need to reset your numbers).
Parent No/Unique No (PPPNNN)	The Parent Quote or Order number, followed by a sequential number determined by the total.line.items field in the parent item. This option is only displayed in the line item environment record (*environment.ocml*).

Quote options

These options determine the overall behavior of quotes and how they will be processed.

Option	Description
Allow Access without Operator Profile	If true, operators without user profiles can access the area using the area's default profile.
Schedule Alerts?	Enables alerts to be turned on (true) or off (false) for the entire area, such as alerts added to the current alerts file.
Schedule Events?	Enables event processing to be turned on (true) or off (false) for the entire area, such as events added to the schedule file, or not. The default setting is false.
Operator ID/Full Name	Controls if the Operator's Login ID or the Full Name is recorded in the application's records. If true, the Operator ID is recorded; if false, the Full Name is recorded. The default is false. This information is recorded in the variable *ocm.ufname*.

Number control reset application

Resetting the number file at a particular point may be required due to several scenarios, including the following:

- Heavy activity.
- Auditing requirements.
- Dates used as part of the numbering convention.

Number resetting is often performed on a monthly or annual basis, depending on your numbering scheme for that functional area.

The *number.reset* application is used to force the number file to be reset at a particular time. The application resets the number record to zero (0).

Important: Quote and Order line item numbers are stored in the same out-of-box Line Items file (*ocml*), distinguished by Q for quotes and O for orders. When you reset numbering, you need to take into account whether future records will conflict with current record numbers. The number must be a unique value, as defined in the database dictionary file for each of the *ocm* files.

A schedule record must be defined to run in any Service Manager background processor. This record should be set to execute the *number.reset* application.

Reset the number control application

Applies to User Roles:

System Administrator

Resetting the number file at a particular point may be required due to heavy activity, audits, or dates used as part of the numbering convention.

Important: When you reset numbering, you need to take into account whether future records will conflict with current record numbers. The number must be a unique value, as defined in the database dictionary file for each of the `ocm` files.

To reset the number control application for the line item environment, order environment, or quote environment:

1. Click one of the following to open an application environment record:
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Line Item Environment**
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Order Environment**
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Quote Environment**
2. In the Number Controls section, make the necessary updates to reset the numbering in the application environment.
3. Click **Save**.
4. Click **OK**.

Model view

The model form is an alternate view of the model file. It displays the main part specifications and order fields, tied in with the current inventory, and provides control over when to reorder an item.

Add information to the model view

Applies to User Roles:

Request Administrator

System Administrator

The model form is an alternate view of the model file. It displays the main part specifications and order fields tied to the current inventory.

To add information to the model file:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Model**.

   A blank Request Management model form opens. Add information by creating a new record, or editing an existing record.

2. To edit the existing record:
   a. Use search or advanced search to find one or more records.

   b. Select a target record to edit.

   c. Edit the record.

   d. Click **Save** to save changes to an existing record.

3. To add a new record:
   a. Type the name of the **Model**.

   b. Add applicable information in the fields in the following tabs:

      Note: If you are not sure what information is available in the fields on the tabs you select, see field help. To do this, place your cursor in the field, and then press Ctrl+H or select **Help on field** from the Help menu.

- **General tab**: Stores information, such as the name of the file to post data to and the cost assigned to control the order of items that are presented for selection from the catalog when opening a line item.
- **Current Quantities tab**: Stores stockroom information pertaining to quantities of items. For example, for serialized items, the number of units in the device file listed as installed and for non-serialized items, the number of units that have been delivered over the life of the item.
- **Reorder tab**: Stores reorder information. For example, when an operator requests less than the amount entered in the Min Ord Amount field, then the amount the operator orders is adjusted upward to that amount.
- **Vendors tab**: Stores specific vendor/supplier information for a product.
- **Catalog tab**: Stores all the information about the inventories parts and items.
- **Software tab**: Stores software information, such as licensing and installation information.
- **Picture tab**: Insert an image into the model record. In a Windows client, right-click on the blank box,select **Add**, and then browse your directory to locate the image. In a Web client, click **Specify Image**, type the full path of the file in the **File location** text field or browse to the file, and then click **OK**.

c. Click **Add** to add a new record.

d. Click **OK**.

To use an existing model record to add a new model record:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Model**.

   A blank Request Management model form opens.

2. Click **Search** to open a record list.
3. Select a record from the list to add a new model record.
4. Clear the **Model** field and type a new model name.
5. Add or change information on the form, in each of the fields in all the tabs, to select the applicable information for the new model record.

6. Click **Add** to add the new record.

   Caution: Make sure that you do not click **Save** because doing so will replace the existing model with the new model you are attempting to add.

7. Click **OK**.

Catalog view

The *ocmco* (the co stands for component) or *ocmo.detail* form is a way to view the catalog. It displays the runtime processing control options for each part and the relationship of one part to another. Each item has its own unique component definitions.

Catalog operations

Creating the catalog is the first step in the request process and is one of the most important parts of the Request Management setup process.

The catalog includes three primary files: the *model*, *modelvendor*, and *vendor* files. The model table is a list of items and bundled items available for request, the vendor file is a list of vendors, and the modelvendor table connects the two.

An administrator with rights to create catalog items configures the system, and most operators have rights to access existing catalogs only. Operators do not have editorial control; they cannot add items to the catalog that are not already defined.

Model table

The *model* table is a detailed bill of materials for a part. This includes the hardware, software and services that comprise the item, as well as controls on the part and its components. The table contains information regarding what operators can do with the part, how components of this part are selected, how quote line items turn into orders, and whether to order or to consume from stock. Both the *model.g* form and the *ocmco.g* form can be used to display data contained in the model table.

The catalog defines an item's components and their order generation dependencies. Controlling the order generation dependencies includes the purchase requisition, service, and work orders necessary to obtain the item.

The *Type: Category* field controls the grouping of similar Catalog items under a common name.

The model file defines the components an operator may order, using the Unique key of Part Number to identify items. It also contains all associated component relationships within the catalog.

The model record contains:

- The rules for processing a component when it is a line item as part of a quote or order
- References to component parts included with a parent part
- The names of approval definitions that a component must have when it is added to a quote or an order
- If a part has components, the rules for selecting the dependent components
- The status of quantities of a component: in use, available, on order

The information in the model record is copied to each line item in a quote.

You can view the model file in two different screens:

- *ocmco* (the catalog view)
- *model* (the model view)

Modelvendor table

The `modelvendor` table combines certain information from the `model` and `vendor` tables, such as the vendor's cost, lead time, time zone, and payment schedules.

Vendor table

The vendor table is shared throughout Service Manager as the source of manufacturer and retail vendor/supplier information. It also holds data on internal and external service providers. A vendor record for a particular manufacturer must exist before items from the manufacturer can be admitted to the Configuration Management and Request Management catalogs.

The vendor table provides contact and services information for a particular vendor/suppler.

Macros

There are no specific macros for Request Management. The standard macro options are available through the macro definitions (*macro.definitions.g*) form. You can set these up to create actions from within Request Management. The standard options include the following:

- Fax 1 Assignment Group
- Fax 1 Person
- Fax Many People
- Mail 1 Assignment Group
- Mail 1 Person
- Mail Many People
- Page 1 Person
- Page Many People
- Page an Assignment Group

Access the macro lister

Applies to User Roles:

System Administrator

Macro conditions are expressions written in HP Service Manager RAD syntax that evaluate at run time. If the expression evaluates to true, the macro executes. If the expression does not evaluate to true, the macro cannot proceed.

To access the macro lister and define a macro to use in Request Management:

1. Click **Tailoring** > **Tailoring Tools** > **Macros**.
2. Click **Add**.

   The macro editor opens. You can define a macro to use in Request Management.

3. In the **Macro Name** field, type a unique name for this new macro.
4. In the **Applies When** field, select a pre-defined event from the list of options when this macro should execute. For example, when a change request is saved.
5. In the **Macro Condition** field, define when this macro should execute. For example, to enter an expression for the condition when a service request is opened you can type `requested in $L.new="open"`.
6. Click **Set Parameters** to establish the parameters for this macro.

   Note: The available fields in this form vary depending on the value in the Macro Type field in the edit form for your new macro.
7. Provide additional information where needed. For example, send page to a specific phone or contact and construct a message.
8. Click **OK**.

   You are returned to the macro list form.
9. Click **Search** from the macro list to refresh the list of macros, and then click **OK**.

Posting

Posting is the process of copying data from a source record to a target record. The purpose of posting is to update similar fields in other records without having to open those records to modify each field.

A link record defined to support the posting process copies data from orders (source records) to quotes (target records). The Comment fields must start with the word *POST*.

Posting to a new Configuration Item (CI) record is done automatically for models that have a configuration file defined. Further posting of actions can occur, but requires system tailoring.

If the background posting process cannot lock records, the posting is rescheduled for a certain time in the future (for a maximum number of times). If the risk of two users accessing and modifying a record simultaneously is unacceptable, consider alternatives for posting to records that need to be locked.

The process of posting is covered in the Format Control section of the Tailoring Help. In Request Management, the master Format Control records (*ocmq, ocmo, or ocml*) execute first; then the category Format Control (name=phase definition's default view). These Format Control records can call the *post.fc* application.

See the Tailoring Help for more information about posting and creating link records.

Post data using a link record

Applies to User Roles:

System Administrator

One of the advantages of a relational database is the elimination of redundant information. This is accomplished by storing information about a particular subject in one place, or file, with links to other subjects. Links are a combination of data and link definitions, sets of conditions containing relationships for linked information.

The posting process requires you to create a standard Service Manager link record. The link record establishes the connection between similar fields in the source and target files.

To post data using a link record:

1. Click **Tailoring** > **Tailoring Tools** > **Links**.

   A blank Link File form opens.

2. Type the **Name** of the new link record you wish to add.

3. Click **New**.

   You receive a message that states the link record has been added.

   To finish adding the record, type the following values in the first line of the new link record. Place your cursor in each of the following fields to enter the values for each.

Field	Value
Source Field Name	**requested.by**
Target File Name	**contacts**
Target Field Name	**contact.name**
Comments	**POST**

4. **Important**: You must enter POST in upper case letters in the Comments field for the posting process to work.

5. Click **Save** to update the link record.

6. Click **OK**.

Alerts, events, and messages

Events are system occurrences, triggered by user activity or certain conditions, that require additional user action. Examples of events in Request Management include open, update, close, and approval (of quotes).

Events in Request Management send messages to designated parties (operators or groups) within the system. For example, messages indicate that someone opened a quote and start the approval process by notifying an approver.

If a time limit set for accomplishing an approval is not met, an alert runs. An alert is an optional time-delayed event, which causes another event to send out a message.

As soon as a request is approved, that action constitutes an event. The event sends a message that indicates the state of the request.

Events, alerts, and messages build a chain of communication, notifying users of pending quotes and orders and the status of requested items throughout their life cycles.

Note: Setting up alerts, events, messages, and approvals requires the operation of the *ocm* background scheduler. The scheduler must be included in the system start-up schedule record. See Background processing and Generating orders for help in setting up these processes.

Alerts

Quotes, orders, and line items progress in phases according to a predefined schedule. Alerts monitor the progress of these phases and take action when approvals are overdue. For example, the late notice alert notifies a designated management group that a quote line item(s) is overdue for approval, and updates the alert status to include late notice.

The user can define any number of standard or customized alerts for any phase; control who is notified for each alert; and control the naming convention used for the alert itself.

Alerts support several functions within the system.

Function	Description
Alert Messaging	Alerts trigger events. The event manager generates messages to certain designated recipients as a result of an alert. The messages update the original request.
Batch Scheduling	All alerts associated with a phase are scheduled at once when the phase opens.

Alert processing

There are two primary files used in alert processing.

File Name	Description
Alert Definition (AlertDef)	Used by all phases to define the basic alert information for each named alert and and all general alert definitions (static file)
Current Alerts (Alerts)	Tracks the alerts created for each phase (active alert file)

Alert definitions

Quotes, orders, and line items progress in phases according to a predefined schedule. Alerts monitor the progress of these phases and take action when approvals are overdue. The Alert Definition is a static file that defines the basic alert information for each named alert and all general alert definitions.

View an alert definition record

Applies to User Roles:

System Administrator

To view alert definition records for use in the Change Management, Problem Management, Request Management, or Service Level Management applications, follow these steps:

1. Select one of the following paths:
   - Change Management: Click **Change Management** > **Maintenance** > **Alerts**.
   - Problem Management: Click **Problem Management** > **Administration** > **Alert Definitions**.
   - Request Management: Click **Request Management** > **Maintenance** > **Supporting Files** > **Alert Definitions**.
   - Service Level Management: Click **Service Level Management** > **Configuration** > **Alert Definitions**.
2. Type or select optional search criteria.
3. Click **Search**.

4. Click any record in the list to view the alert details.
5. You can add to or change information in the form.

   Tip: If necessary, press **Ctrl+H** in the Windows client or press **F1** in the web client for each field.

6. If you make changes, click **Save**.

Click here to show or hide links to related topics.

Related concepts

Alerts

Related tasks

Create an alert definition record

Alert log file

Quotes, orders, and line items progress in phases according to a predefined schedule. Alerts monitor the progress of these phases and take action when approvals are overdue. The Alert log is a file that lists currently scheduled and active alerts.

Access the alert log file

Applies to User Roles:

System Administrator

Quotes, orders, and line items progress in phases according to a predefined schedule. Alerts monitor the progress of these phases and take action when approvals are overdue.

To access the alert log file:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Alert Logs**. A blank search alert log form opens.
2. Add optional search criteria, and then click **Search**.

   A list of all current alert log records opens.

3. Click a record in the list to access the record.

Access the alert log when viewing a quote, line item, or order record

Applies to User Roles:

Request Coordinator, Request Administrator, System Administrator

The alert log is a file that lists currently scheduled and active alerts.

To access the alert log when viewing a quote, line item, or order record:

1. Click one of the following:
   - **Request Management** > **Quotes** > **Quote Queue**
   - **Request Management** > **Line Items** > **Line Item Queue**
   - **Request Management** > **Orders** > **Order Queue**
2. Click **Search** in the request queue form.
3. Add optional search criteria, and then click **Search** to generate a list of all current records.
4. Select a record in the list that you want to view.
5. Click **More** or the More Actions icon, and then choose **Logs** > **Alert Log** to view the currently scheduled and active alerts.

Access phase definition alert controls

User roles: Request Coordinator, Request Administrator, System Administrator

You can access phase definition alert controls in Request Management for quotes, line items, or orders.

To access phase definition alert controls for quotes, line items, or orders:

1. Click one of the following:
   - **Request Management** > **Quotes** > **Quote Phases**
   - **Request Management** > **Line Items** > **Line Item Phases**
   - **Request Management** > **Orders** > **Order Phases**
2. Add optional search criteria, and then click **Search**.

   A list of phase records opens.

3. Click a phase name to open it in the form.

4. Click the **Alerts** tab. The phase record specifies certain alert controls. Alert controls on the phase record form include the following:

Control	Description
Reset	Sets the status of all current alert records associated with the current quote or order to inactive and marks the last action field as reset. Then it schedules a calculate alert record to recalculate the item's alerts and restart the alerts process.
Reeval	Retrieves each Alert associated with the quote or order and performs the following processing. If current alert status is active, Service Manager reevaluates the alert condition and updates the alert to reflect the correct status. If the alert status is not active, Service Manager reevaluates the alert condition. If this condition is true, Service Manager: 1. Sets the status to Scheduled. 2. Sets the last action to Recalc. 3. Sets the action time to the current date/time. 4. Reevaluates the Schedule Condition. If this condition is true, Service Manager recalculates the Alert Time and updates the status to Scheduled. If this condition is false, Service Manager sets the status to Not Required.

Events

Events are system occurrences triggered by the creation or update of quotes, orders, and line items. The following are some examples.

- Opening a quote
- Approving a quote
- Changing the dollar amount of an order

You can use events to trigger special processing, such as alerts and messages. When these specific activities occur, Request Management sends mail messages to users, as part of the default processing. You can run other customized routines for particular events.

Several default events are included with Request Management. Others may be added, according to your business needs (for example, activities or conditions that need to be checked or unique events warranting notification).

When an Alert Condition evaluates to true, Request Management treats it as an event, and notifications are sent for this alert condition.

Request Management event services

Increasingly, enterprise-wide network management tools depend on automation to detect activity on the network and to execute the appropriate procedures. These network incidents are often called alarms or alerts; Service Manager refers to them as events.

Service Manager includes Event Services enhancements in Request Management to support external event processing.

Request Management event controls

The option to schedule events is on the quote, order, and line item environment records (*environment.ocmq*, *.ocmo*, or *.ocml*). For information on editing the environment records, see the related topics.

The Schedule Events? field in the Quote Options structure sets when events are processed for categories and phases.

- If this check box is unchecked (false), events are not scheduled for processing or recorded in the message log, *msglog* file.
- If this check box is checked (true), and Messages/Events? in the phase record (*ocmoptions*) is false, the event is scheduled and recorded in the *msglog*, but no other processing occurs.

The option for processing messages and events is located on the quote, order, and line item Phase definition (*ocmoptions*) record. See Phases for details on how to access and create phase definitions.

The Messages/Events field in the Controls tab sets the controls that define when events are processed for the particular phases named.

All event names must be defined in the *ocmevents* file, or no event processing can occur. See Events for more details.

Events are processed when the phase of the quote, order, or line item is defined in the Phases field of the *ocmevents* file. If the Phase field is empty on the *ocmevents* record, the event is processed for all phases.

The *Exec Cond* option in the *ocmevents* record controls, at the event level, when an event is processed.

Request Management events table

Enterprise-wide network management tools depend on automation to detect activity on the network and to execute the necessary procedures. HP Service Manager refers to these network incidents as events. The Request Management (*ocmevents*) file contains the names and definitions of all valid Request Management events.

Defining additional events

A new event can be defined and called by Format Control calculations, in the case that a specific condition must be checked for the event to occur at specialized times.

The syntax generally used to check for an event is as follows.

```
(x=o, q, or l): if (condition=true) then ($ocmx.events.pntr in
$ocmx.events=“event name”;$ocmx.events.pntr+=1)
```

- The variable *$ocmx.events* (where x = the area q, o, or l) is an array of character strings used to track the events that occur during a particular phase of processing.
- The variable *$ocmx.events.pntr* is a pointer to the next array element that can be used to record an event name.

Important: Once an event has been added to the array, it is important to increment the pointer by 1 (one). If this does not happen, the event previously recorded will be overwritten.

The event that is scheduled if the condition is true must be defined in the *ocmevents* file.

Processing external events from SCAuto

If you have an integration, you can use the method described in the *HP ServiceCenter Automate (SCAuto) Software Development Kit (SDK)* to send events via email. However, as defined below, the event can be configured as an open, approval, denial, or any of the other accepted events in the system. Use the method described in the above guide for manipulating the data and placing it in the eventin table.

Service Manager applications have been set up to support incoming events for Request Management. The supported events are as follows.

Event	Description
rmqin	Supports Open, Update, and Close-phase of Quotes.
rmlin	Supports Open, Update, and Close-phase of Line Items.

Event	Description
rmoin	Supports Open, Update, and Close-phase of Orders.

With these three events, it is expected that the event will include the following initial data elements.

```
number^operator^action
```

Data Element	Description
Number	The item to work on.
Operator	Role to work as.
Action	What to do (open/update/close).

This event is also supported, with different initial data elements.

Event	Description
approval	Supports Approval actions on Quotes (Approve, Deny, and Retract).

The following initial data elements are included in the approval event.

```
area^number^group^action^date^operator^comments
```

Data Element	Description
Area	Quote (ocmq), order (ocmo), or line item (ocml).
Number	The item to work on.
Group	The Approval group.
Action	What to do (approve/deny/retract).
Date	Date of the transaction.
Operator	Role to work as.
Comments	Extra information, such as for billing or shipping.

Events and messages

The system can send messages to operators when events occur, such as the following:

- Opening a quote
- Approving a request
- Opening a line item
- Closing a phase

Event records are defined in the *ocmevents* file. These records indicate what message is sent when the event occurs. See Alerts, events, and messages for more information on events and messages.

Add new events

Applies to User Roles:

System Administrator

Events in Request Management send messages to designated parties (operators or groups) within the system. For example, messages indicate that someone opened a quote and start the approval process by notifying an approver.

To add a new event:

A. Set the environment record to schedule events:

1. Click the following to edit the line item, order, and quote environment records.
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Line Item Environment**.
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Order Environment**.
   - **System Administration** > **Ongoing Maintenance** > **Environment Records** > **Request Management Quote Environment**.

     The Request Management application environment form opens.
2. For each environment record, check the **Schedule Events?** field to set to true.
3. Click **Save**.
4. Click **OK**.

B. Define the Messages/Events option for the phase.

1. Click the following to edit the phase for line items, orders, and quotes.
   - **Request Management** > **Line Items** > **Line Item Phases**.
   - **Request Management** > **Orders** > **Order Phases**.
   - **Request Management** > **Quotes** > **Quote Phases**.
2. Click **Search** to open a record list.
3. Edit the messages and events field.
   - For line item phases: Select the Definition tab of the Controls section, and then type **true** in the **Msg/Events** field.
   - For order phases: Select the Definition tab of the Controls section, and then type **true** in the **Msg/Events** field.
   - For quote phases: Select the Controls, and then type **true** in the **Messages/Events** field.
4. Click **Save**.
5. Click **OK**.

C. Add the new event.

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Events**.

   A blank Request Management events form opens.
2. Type the name of the **Event**.
3. In the **Area** field, select from Quotes, Orders, Line Items, or All to designate the area for the event.
4. Type a **Description** of the event.
5. Continue to define the new event by completing the fields on the form. For example, type the designated operators or groups to send messages to.
6. Click **Add** to add a new record.

To use an existing event record to create a new event:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Events**.

   A blank Request Management events form opens.

2. Click **Search** to open a record list.
3. Select a record from the list to create a new event.
4. Clear the **Event** field and type a new event name.
5. Add or change information on the form to select the applicable information for the new event record.
6. Click **Add** to add the new record.

   Caution: Make sure that you do not click Save because doing so will replace the existing event with the new event you are attempting to add.
7. Click **OK**.

Create a background event record

To create a background event record:

1. Click **Request Management** > **Maintenance** > **Administration** > **Backend Order Destinations**.
2. Start typing the appropriate values, or click **Search** in the toolbar to open a list of existing backend event records.
3. Click the name of an event on which you would like to base your new backend event.
4. Type a new backend event Name.
5. Modify the record to create your new backend event configuration record.
6. Click **Add** to add it to the *ocmbackend* file.

Event names and definitions

Request Management includes several predefined system events. You can define additional events as needed. The following partial record list shows some of the most commonly used predefined system events, and to which Request Management areas they apply.

Commonly Used Predefined System Events

The following table describes predefined system events.

Events	Area
alerts recalc	o (orders)
alerts recalc	q (quotes)
alerts reset	o
alerts reset	q
approval	o
approval	q
approval reeval	o
approval reeval	q
approval reset	o
approval reset	q
approved	o
approved	q
close **category change**	o
close **- category change**	q
close **- partial received**	l (line items)

Default List of System Event Names and Definitions

The following is the default list of system event names and definitions. (Some apply to certain areas, and others apply to all areas.)

Event Name	Description
alerts recalc	The quote or order's alerts have been recalculated.
alerts reset	The quote or order's alerts have been reset.
approval	An operator has approved one of the approval requirements of an item.
approval reeval	The approval requirements of a quote/order have been reevaluated.
approval reset	The approval requirements of a quote/order have been reset.

Event Name	Description
approved	All approval requirements for an item have been approved.
close - category change	The category of a quote/order has been manually changed.
close - partially received	A line item has been closed, but not all of the ordered quantities have been received.
close - phase change	The phase of an item has been closed due to a manual phase change.
close -- received	A line item has been fully received; or, all of the line items of an order have been fully received.
close final	The final phase of an item is complete. The item is closed.
close phase	An intermediary phase of an item is complete, but the item is still open.
copy&open	An item (quote, order, or line item) has been copied to a new item.
disapproval	One of an item's approval requirements has been denied.
disapproved	The quote/order is denied based on the Approval Status rules.
drop avail	A line item has been manually dropped from the available to order status.
due date notice	This contains sample system data.
gen order delayed	The background generate orders process has been delayed due to a posting process that has not yet completed. The generate orders schedule record has been updated to run at its next normally scheduled time.
late notice	This contains sample system data.
mark avail	A line item has been made available for order processing.
open	An item has been opened.
open next	The next phase of an item has been opened.
open next - category change	A new phase has been started due to a manual category change.
open next - phase change	The next phase has been started due to a manual phase change.
pending vendor - select	A line item is pending the selection/assignment of a vendor and cannot be processed until the vendor is assigned.
post bg - error	The line item that was targeted for posting could not be found.
post bg	A background posting schedule record has been rescheduled more than

Event Name	Description
- excessive resched	three times.
post bg - process error	During background posting of line item data, an unknown processing error occurred.
post bg - quote not found	During background posting, the parent quote could not be found; no data was posted.
post bg - rescheduled	The parent quote/order could not be locked.
posting not complete	When quantity > 0, and Received + BO'd + Cancel + Returned = 0 (the fields on ocml.receive.post format)
reeval	For approvals or alerts.
reopen	A closed item has been reopened.
reset	For approvals and alerts.
shortage	The OCM Order Create background processor attempted to process a quote line item; there is insufficient available inventory to satisfy the requirement of the line item. There are no open orders for this Part.
sap order pricing	SAP associates and verifies prices for individual items to be ordered.
sap purchase req	SAP processed Service Manager request and queries for items available to order.
sap quote pricing	SAP associates prices with items that are displayed on the Service Manager quote.
unapproval	An operator has retracted one of the approval requirements of an item.
update	An item has been updated.
waiting	The OCM Order Create Background processor attempted to process a quote line item; there is insufficient available inventory, but there is already an outstanding order for the Part. Waiting on receipt of item.

Example event string start sequences

To approve a quote (such as number Q1234), acting as SYSTEM ADMINISTRATOR, within the security group management, send an *Approval* event with this string.

```
ocmq^Q1234^^approve^02/20/01 06:00^System.Admin^ok
```

To update a line item (such as L78), acting as a service desk agent, send an *rmlin* event with this string.

```
L78^Servicedesk.Agent^update^.........
```

To move an order (such as O89) to its next phase, acting as request administrator Rachel Boudreau, send an *rmoin* event with this string.

```
O89^Rachel.Boudreau^close^.........
```

External event services

The External Event Services enhancements include the following events.

Area	Action	Description
Quote	Approve	Approve a quote
Quote	Deny	Deny a quote
Quote	Retract	Retract a quote
Quote	Open	Create a new quote
Quote	Update	Update an existing quote
Quote	Close	Close current phase and go to next if exists
Order	Approve	Approve an order
Order	Deny	Deny an order
Order	Retract	Retract an order
Order	Open	Create a new order
Order	Update	Update an existing order
Order	Close	Close current phase and go to next if exists
Line Item	Open	Create a new line item
Line Item	Update	Update an existing line item
Line Item	Close	Close current phase and go to next, if exists

Line item events

The following tables describe line item events.

Map Name	Sequence	Position	File Name	Field
rmoappr	1	1	ocmo	number
rmoappr	1	2	ocmo	$L.void.operator
rmoappr	1	3	ocmo	$L.void.action
rmoappr	1	4	ocmo	$L.void.approval.action
rmoappr	1	5	ocmo	$L.void.approval.group
rmoappr	1	6	ocmo	open
rmoappr	1	7	ocmo	page
rmoappr	1	8	ocmo	category
rmoappr	1	9	ocmo	current.phase
rmoappr	1	10	ocmo	phase.num
rmoappr	1	11	ocmo	phase.start.date
rmoappr	1	12	ocmo	orig.operator
rmoappr	1	13	ocmo	last.operator
rmoappr	1	14	ocmo	impact
rmoappr	1	15	ocmo	total.line.items
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmoappr	1	16	ocmo	vendor
rmoappr	1	17	ocmo	alert
rmoappr	1	18	ocmo	alert.names
rmoappr	1	19	ocmo	approval.status
rmoappr	1	20	ocmo	pending.groups
rmoappr	1	21	ocmo	status
rmoappr	1	22	ocmo	priority
rmoappr	1	23	ocmo	reason
rmoappr	1	24	ocmo	business.area
rmoappr	1	25	ocmo	submit.date
rmoappr	1	26	ocmo	update.date

Map Name	Sequence	Position	File Name	Field
rmoappr	1	27	ocmo	close.date
rmoappr	1	28	ocmo	coordinator
rmoappr	1	29	ocmo	coord.dept
rmoappr	1	30	ocmo	total
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmoappr	1	31	ocmo	description
rmoappr	1	32	ocmo	justification
rmoappr	1	33	ocmo	comments
rmoappr	1	34	ocmo	invoice.no
rmoappr	1	35	ocmo	vendor.contact
rmoappr	1	36	ocmo	shipping.terms
rmoappr	1	37	ocmo	po.number
rmoappr	1	38	ocmo	completion.code
rmoappr	1	39	ocmo	completion.notes
rmoappr	1	40	ocmo	net.total
rmoappr	1	41	ocmo	tax.code
rmoappr	1	42	ocmo	tax.rate
rmoappr	1	43	ocmo	tax.amount
rmoappr	1	44	ocmo	ship.to.code
rmoappr	1	45	ocmo	vendor.zip
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmoappr	1	46	ocmo	bill.to.code
rmoappr	1	47	ocmo	shipping.carrier
rmoappr	1	48	ocmo	freight.on.board
rmoappr	1	49	ocmo	payment.terms
rmoappr	1	50	ocmo	freight.charges
rmoappr	1	51	ocmo	vendor.contract.no

Map Name	Sequence	Position	File Name	Field
rmoappr	1	52	ocmo	discount.rate
rmoappr	1	53	ocmo	discount.amt
rmoappr	1	54	ocmo	ship.to.ext
rmoappr	1	55	ocmo	bill.to.ext
rmoappr	1	56	ocmo	phase.desc
rmoappr	1	57	ocmo	project.id
rmoappr	1	58	ocmo	target.date
rmoappr	1	59	ocmo	shipping.terms
rmoappr	1	60	ocmo	orig.manager.group
rmoappr	1	61	ocmo	parts.summary
rmoappr	1	62	ocmo	foreign.id

Map Name	Sequence	Position	File Name	Field
rml	1	1	ocml	number
rml	1	2	ocml	$L.void.operator
rml	1	3	ocml	$L.void.action
rml	1	4	ocml	page
rml	1	5	ocml	phase.num
rml	1	6	ocml	phase.desc
rml	1	7	ocml	category
rml	1	8	ocml	current.phase
rml	1	9	ocml	status
rml	1	10	ocml	parent.quote
rml	1	11	ocml	parent.order
rml	1	12	ocml	parent.line.item
rml	1	13	ocml	gen.ord.li
rml	1	14	ocml	project.id
rml	1	15	ocml	alert

Map Name	Sequence	Position	File Name	Field
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rml	1	16	ocml	alert.names
rml	1	17	ocml	orig.operator
rml	1	18	ocml	last.operator
rml	1	19	ocml	trans.type
rml	1	20	ocml	open
rml	1	21	ocml	avail.to.order
rml	1	22	ocml	business.area
rml	1	23	ocml	receiving.priority
rml	1	24	ocml	track.receiving
rml	1	25	ocml	consolidate
rml	1	26	ocml	combine
rml	1	27	ocml	deffered.select
rml	1	28	ocml	generate.order
rml	1	29	ocml	serialized
rml	1	30	ocml	reorder.type
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rml	1	31	ocml	submit.date
rml	1	32	ocml	phase.start.date
rml	1	33	ocml	update.date
rml	1	34	ocml	close.date
rml	1	35	ocml	ordered.date
rml	1	36	ocml	received.date
rml	1	37	ocml	returned.date
rml	1	38	ocml	backorder.date
rml	1	39	ocml	cancelled.date
rml	1	40	ocml	requested.date

Map Name	Sequence	Position	File Name	Field
rml	1	41	ocml	projected.date
rml	1	42	ocml	target.date
rml	1	43	ocml	actual.date
rml	1	44	ocml	requested.lead.time
rml	1	45	ocml	target.lead.time
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rml	1	46	ocml	normal.lead.time
rml	1	47	ocml	actual.lead.time
rml	1	48	ocml	duty.table
rml	1	49	ocml	coordinator
rml	1	50	ocml	coord.dept
rml	1	51	ocml	assigned.to
rml	1	52	ocml	assigned.dept
rml	1	53	ocml	quantity
rml	1	54	ocml	quantity.returned
rml	1	55	ocml	quantity.received
rml	1	56	ocml	quantity.bo
rml	1	57	ocml	quantity.cancelled
rml	1	58	ocml	quantity.balance
rml	1	59	ocml	from.stock
rml	1	60	ocml	description
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rml	1	61	ocml	comments
rml	1	62	ocml	ship.to.code
rml	1	63	ocml	ship.to.ext
rml	1	64	ocml	bill.to.code
rml	1	65	ocml	bill.to.ext

Map Name	Sequence	Position	File Name	Field
rml	1	66	ocml	serial.no.
rml	1	67	ocml	shipping.terms
rml	1	68	ocml	completion.code
rml	1	69	ocml	completion.notes
rml	1	70	ocml	part.no
rml	1	71	ocml	part.desc
rml	1	72	ocml	manufacturer
rml	1	73	ocml	model
rml	1	74	ocml	model.ext
rml	1	75	ocml	unit.of.measure
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rml	1	76	ocml	level
rml	1	77	ocml	sequence
rml	1	78	ocml	neg.level
rml	1	79	ocml	neg.seq
rml	1	80	ocml	unit.cost
rml	1	81	ocml	labor.hours
rml	1	82	ocml	labor.cost
rml	1	83	ocml	labor.overtime.hours
rml	1	84	ocml	labor.overtime.cost
rml	1	85	ocml	tax.code
rml	1	86	ocml	tax.rate
rml	1	87	ocml	tax.amount
rml	1	88	ocml	modelv.no
rml	1	89	ocml	vendor
rml	1	90	ocml	vendor.part.no
Map Name	**Sequence**	**Position**	**File Name**	**Field**

Map Name	Sequence	Position	File Name	Field
rml	1	91	ocml	vendor.contract.no
rml	1	92	ocml	vendor.contact
rml	1	93	ocml	vendor.dt
rml	1	94	ocml	payment.freq
rml	1	95	ocml	payment.terms
rml	1	96	ocml	no.of.payments
rml	1	97	ocml	payment.amount
rml	1	98	ocml	discount
rml	1	99	ocml	discount.amt
rml	1	100	ocml	total
rml	1	101	ocml	warehouse
rml	1	102	ocml	logical.name
rml	1	103	ocml	rma.no
rml	1	104	ocml	asset.no
rml	1	105	ocml	current.location
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rml	1	106	ocml	warranty
rml	1	107	ocml	request.number
rml	1	108	ocml	cm3.access
rml	1	109	ocml	target.completion
rml	1	110	ocml	target.order
rml	1	111	ocml	actual.order.lead
rml	1	112	ocml	foreign.id
rml	1	113	ocml	contact.name
rml	1	114	ocml	location
rml	1	115	ocml	license.number

Quote events

The following table describes quote events.

Map Name	Sequence	Position	File Name	Field
rmq	1	1	ocmq	number
rmq	1	2	ocmq	$L.void.operator
rmq	1	3	ocmq	$L.void.action
rmq	1	4	ocmq	open
rmq	1	5	ocmq	page
rmq	1	6	ocmq	category
rmq	1	7	ocmq	current.phase
rmq	1	8	ocmq	phase.num
rmq	1	9	ocmq	phase.start.date
rmq	1	10	ocmq	orig.operator
rmq	1	11	ocmq	last.operator
rmq	1	12	ocmq	impact
rmq	1	13	ocmq	total.line.items
rmq	1	14	ocmq	alert
rmq	1	15	ocmq	alert.names
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmq	1	16	ocmq	approval.status
rmq	1	17	ocmq	pending.groups
rmq	1	18	ocmq	status
rmq	1	19	ocmq	priority
rmq	1	20	ocmq	reason
rmq	1	21	ocmq	business.area
rmq	1	22	ocmq	submit.date
rmq	1	23	ocmq	update.date

Map Name	Sequence	Position	File Name	Field
rmq	1	24	ocmq	close.date
rmq	1	25	ocmq	cancelled.date
rmq	1	26	ocmq	requestor.name
rmq	1	27	ocmq	requestor.dept
rmq	1	28	ocmq	coordinator
rmq	1	29	ocmq	coord.dept
rmq	1	30	ocmq	assigned.to
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmq	1	31	ocmq	assigned.dept
rmq	1	32	ocmq	description
rmq	1	33	ocmq	justification
rmq	1	34	ocmq	comments
rmq	1	35	ocmq	ship.to.code
rmq	1	36	ocmq	bill.to.code
rmq	1	37	ocmq	shipping.terms
rmq	1	38	ocmq	total.cost
rmq	1	39	ocmq	completion.code
rmq	1	40	ocmq	completion.notes
rmq	1	41	ocmq	li.mark.flag
rmq	1	42	ocmq	bill.to.ext
rmq	1	43	ocmq	ship.to.ext
rmq	1	44	ocmq	phase.desc
rmq	1	45	ocmq	project.id
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmq	1	46	ocmq	orig.manager.group
rmq	1	47	ocmq	requested.date
rmq	1	48	ocmq	admin.lead.time

Map Name	Sequence	Position	File Name	Field
rmq	1	49	ocmq	duty.table
rmq	1	50	ocmq	parts.summary
rmq	1	51	ocmq	foreign.id
rmq	1	52	ocmq	requestor.phone
rmq	1	53	ocmq	manager
rmq	1	54	ocmq	logical.name

Order events

The following tables describe order events.

Map Name	Sequence	Position	File Name	Field
rmqappr	1	1	ocmq	number
rmqappr	1	2	ocmq	$L.void.operator
rmqappr	1	3	ocmq	$L.void.action
rmqappr	1	4	ocmq	$L.void.approval.action
rmqappr	1	5	ocmq	$L.void.approval.group
rmqappr	1	6	ocmq	open
rmqappr	1	7	ocmq	page
rmqappr	1	8	ocmq	category
rmqappr	1	9	ocmq	current.phase
rmqappr	1	10	ocmq	phase.num
rmqappr	1	11	ocmq	phase.start.date
rmqappr	1	12	ocmq	orig.operator
rmqappr	1	13	ocmq	last.operator
rmqappr	1	14	ocmq	impact
rmqappr	1	15	ocmq	total.line.items
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmqappr	1	16	ocmq	alert

Map Name	Sequence	Position	File Name	Field
rmqappr	1	17	ocmq	alert.names
rmqappr	1	18	ocmq	approval.status
rmqappr	1	19	ocmq	pending.groups
rmqappr	1	20	ocmq	status
rmqappr	1	21	ocmq	priority
rmqappr	1	22	ocmq	reason
rmqappr	1	23	ocmq	business.area
rmqappr	1	24	ocmq	submit.date
rmqappr	1	25	ocmq	update.date
rmqappr	1	26	ocmq	close.date
rmqappr	1	27	ocmq	cancelled.date
rmqappr	1	28	ocmq	requestor.name
rmqappr	1	29	ocmq	requestor.dept
rmqappr	1	30	ocmq	coordinator
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmqappr	1	31	ocmq	coord.dept
rmqappr	1	32	ocmq	assigned.to
rmqappr	1	33	ocmq	assigned.dept
rmqappr	1	34	ocmq	description
rmqappr	1	35	ocmq	justification
rmqappr	1	36	ocmq	comments
rmqappr	1	37	ocmq	ship.to.code
rmqappr	1	38	ocmq	bill.to.code
rmqappr	1	39	ocmq	shipping.terms
rmqappr	1	40	ocmq	total.cost
rmqappr	1	41	ocmq	completion.code
rmqappr	1	42	ocmq	completion.notes

Map Name	Sequence	Position	File Name	Field
rmqappr	1	43	ocmq	li.mark.flag
rmqappr	1	44	ocmq	bill.to.ext
rmqappr	1	45	ocmq	ship.to.ext
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmqappr	1	46	ocmq	phase.desc
rmqappr	1	47	ocmq	project.id
rmqappr	1	48	ocmq	orig.manager.group
rmqappr	1	49	ocmq	requested.date
rmqappr	1	50	ocmq	admin.lead.time
rmqappr	1	51	ocmq	duty.table
rmqappr	1	52	ocmq	parts.summary
rmqappr	1	53	ocmq	foreign.id
rmqappr	1	54	ocmq	requestor.phone
rmqappr	1	55	ocmq	manager
rmqappr	1	56	ocmq	logical.name

Map Name	Sequence	Position	File Name	Field
rmo	1	1	ocmo	number
rmo	1	2	ocmo	$L.void.operator
rmo	1	3	ocmo	$L.void.action
rmo	1	4	ocmo	open
rmo	1	5	ocmo	page
rmo	1	6	ocmo	category
rmo	1	7	ocmo	current.phase
rmo	1	8	ocmo	phase.num
rmo	1	9	ocmo	phase.start.date
rmo	1	10	ocmo	orig.operator

Map Name	Sequence	Position	File Name	Field
rmo	1	11	ocmo	last.operator
rmo	1	12	ocmo	impact
rmo	1	13	ocmo	total.line.items
rmo	1	14	ocmo	vendor
rmo	1	15	ocmo	alert
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmo	1	16	ocmo	alert.names
rmo	1	17	ocmo	approval.status
rmo	1	18	ocmo	pending.groups
rmo	1	19	ocmo	status
rmo	1	20	ocmo	priority
rmo	1	21	ocmo	reason
rmo	1	22	ocmo	business.area
rmo	1	23	ocmo	submit.date
rmo	1	24	ocmo	update.date
rmo	1	25	ocmo	close.date
rmo	1	26	ocmo	coordinator
rmo	1	27	ocmo	coord.dept
rmo	1	28	ocmo	total
rmo	1	29	ocmo	description
rmo	1	30	ocmo	justification
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmo	1	31	ocmo	comments
rmo	1	32	ocmo	invoice.no
rmo	1	33	ocmo	vendor.contact
rmo	1	34	ocmo	shipping.terms
rmo	1	35	ocmo	po.number

Map Name	Sequence	Position	File Name	Field
rmo	1	36	ocmo	completion.code
rmo	1	37	ocmo	completion.notes
rmo	1	38	ocmo	net.total
rmo	1	39	ocmo	tax.code
rmo	1	40	ocmo	tax.rate
rmo	1	41	ocmo	tax.amount
rmo	1	42	ocmo	ship.to.code
rmo	1	43	ocmo	vendor.zip
rmo	1	44	ocmo	bill.to.code
rmo	1	45	ocmo	shipping.carrier
Map Name	**Sequence**	**Position**	**File Name**	**Field**
rmo	1	46	ocmo	freight.on.board
rmo	1	47	ocmo	payment.terms
rmo	1	48	ocmo	freight.charges
rmo	1	49	ocmo	vendor.contract.no
rmo	1	50	ocmo	discount.rate
rmo	1	51	ocmo	discount.amt
rmo	1	52	ocmo	ship.to.ext
rmo	1	53	ocmo	bill.to.ext
rmo	1	54	ocmo	phase.desc
rmo	1	55	ocmo	project.id
rmo	1	56	ocmo	target.date
rmo	1	57	ocmo	shipping.terms
rmo	1	58	ocmo	orig.manager.group
rmo	1	59	ocmo	parts.summary
rmo	1	60	ocmo	foreign.id

Logical actions

There are twelve logical actions that run through four actual event classes.

Event Class	Description
rmlin	Used for open/update/close of all line items
rmoin	Used for open/update/close of orders
rmqin	Used for open/update/close of quotes
approval	Used to approve/deny/retract quotes and orders.

Record modification classes

These three events (rmlin, rmqin, rmoin) are used to send record modification actions into Request Management for line items, quotes, and orders. The structure of their event strings is as follows.

Sequence	Description
1	Number of the object to be acted upon. If in rmlin, this will be a line item number. If in rmqin, this will be a quote number. If in rmoin, this will be an order number. In the open process, this field is discarded.
2	Operator ID who is executing this action. The action takes place within this operator's security context.
3	Action Taken, indicating what type of modification action to take. One of open, update, close.
4..*n*	Mapped data fields, containing changes to the record. Processed along with the approval.

Messages

Service Manager sends messages in response to an event. They can be directed to specific operators listed in the event record, and contain values from certain fields in quote, order, and line item records that caused the initial event.

Request Management message processing involves the following:

- The background processor looking at the *ocmoptions* record for the phase or category that generated the event. If the record does not exist, processing ends.
- Evaluation of the Messages/Events option in the *ocmoptions* record. If false, processing ends.
- Checking for field name and operators in the *ocmevents* record. If none, processing ends (unless this event is delayed by *gen order*).
- Recording in the *msglog* the generic message (from the *ocmevents* record's Append Text field).
- Sending the standard message and the mail message to the operators defined in the Operators field of the *ocmevents* record.
- Sending a message to the operators defined in those fields referenced by the Field Name field of the *ocmevents* record.

The content of these fields is first assumed to be a group. If this group name is found in the *ocmgroups* file, then either the members or approvers (depending on the Member List field) of that group are added to a working list.

If this group name does not exist, the system searches the operator file; and if an operator record is found, it is added to the working list.

Message classes

Service Manager has several default message classes where a user can define additional messages to display in Request Management.

The Notifications menu contains the various message class action types:

- On-Screen (*msg*) – Send a message to the user's screen.
- Print (*print*) – Send a copy of the message to the receiver's default printer.
- Log (*log*) – Send a copy of the message to the msglog file.
- TSO (*TSO*) – Send a copy of the message to the receiver's TSO ID.
- External E-Mail (*email*) – Send a copy of the message to the receiver's e-mail address as specified in the operator or contacts record.
- Internal E-Mail (*email*) – Send a copy of the message to the receiver's internal Service Manager mailbox.

Add a message class record

Applies to User Roles:

System Administrator

Service Manager has several default message classes where a user can define additional messages to display in Request Management.

To add a message class record:

1. Click **Tailoring** > **Notifications** > **Message Types**.
2. Click **Search**.
3. Select a message type from the record list on which to base your new record.
4. Clear the message **Type**, and then enter a type for the new message record.
5. Add or change information on the form to set up the new message record.
6. Check the **Active?** box if this is an active message.
7. Click **Add** to confirm the new record.

   Caution: Make sure you do not click Save because doing so will replace the existing message record with the new record you are attempting to add.

Notification engine

The Notification Engine is primarily responsible for sending messages that are generated by Service Manager events, such as opening or closing a quote or order. Administrators can edit these messages, add new messages, change the conditions under which the messages will be sent out, as well as select who will receive the messages.

The notification file works with the message file to define notifications for common system events. Administrators can modify the notification arguments that trigger the notification, as well as define who receives the notification.

Open the notifications file

Applies to User Roles:

System Administrator

You can configure Service Manager to send notifications whenever specific system events occur. By default, Service Manager supports notifications for every type of status change event.

To open the notifications file:

1. Click **Tailoring** > **Notifications** > **Notifications**.
2. Add optional search criteria, and then click **Search**.

   The list of notification records opens.
3. Select a target record to view.

   Note: For information on adding a notification definition record, adding a notification delivery method, or creating a custom notification, see the related topics.

Request Management overview

Request Management is the Service Manager application used to manage user requests for products and services. Requests affect only the person making the request, or a subordinate group of employees. Examples include password resets, individual pc upgrades, and new employee setup. For changes to the infrastructure, refer to Change Management.

Request Management includes the following key features:

- Automated quote, manager approval, and order processing tracking for products and services.
- Detailed, customizable catalog of products and services, including bundled and sequenced parts and services.
- Scheduling and integration of service requests and work orders with purchase requests.
- Combination of multiple quotes into single or multiple orders, based on vendor/supplier.
- Provision for external vendors/suppliers and internal work groups.
- Integration with other Service Manager applications, such as Configuration Management and Change Management.
- Sequential and Conditional on-line quote entry and approvals.
- Automated mail notification and alerts for normal and exceptional events.
- Customer control, consolidation of acquisitions, and life cycle management.
- Quote—Order—Receiving—Posting process.

When should you use Change Management instead of Request Management? Here are some guidelines.

- Change Management handles any change to your business that modifies or disrupts the current state of that environment. Usually these modifications or disruptions affect multiple users or business units.
- Request Management handles common user requests for products and services. These requests usually affect only the person making the request, or a subordinate group of employees.

Pre-implementation planning

Pre-implementation planning includes the following activities:

- Creating the catalog.
- Setting up the approval process.
- Setting up phases.
- Creating the order process.
- Setting up notifications and alerts.
- Considering how quotes should be handled when closed.
- Considering the activities for closing and receiving order line items.
- Establishing the level of user access to Request Management for users.
- Determining the implementation plan for configuration items (CIs).
- Determining what to report, and when.
- Selecting audit fields and who will maintain the audit records.
- Validating the implementation of Request Management to your office's expectations.

The related topics provide a synopsis of planning considerations for implementation of a Request Management system. These should be considered a foundation tool for initial planning, used in conjunction with technical consulting services.

The catalog

The Request Management application is based on the concept of a catalog. A catalog, a list of parts and services, is a file that contains all of the items that a requester might want to order. This includes request categories, master categories, and line items such as a new phone, move/add/change of a PC, and a new logon ID.

The Catalog contains all the items that users can request, including request category packages, such as Employee Office Move or whether they directly request to add something to their order at a later time.

Catalog line items require detailed definitions, such as specific model numbers, prices, and delivery lead times. Other items that can be tracked include descriptions, vendors/suppliers, and approval requirements. The Request Management system is only as detailed as the Catalog entries. If it is necessary for items like cable drops, labor related items, and training to be part of a quote, they must be defined in the Catalog.

A feature of the Catalog is the ability to group items in frequently ordered bundles. For example, a common desktop workstation is identified as a 3 GHz Pentium with a 120GB hard drive, 23" monitor, 52X CD-ROM, and 2GB RAM. The requester could then just order a Standard Workstation rather than the individual components. You can also give the requester the option of changing components or ordering an individual component. This is true of services as well. A New Employee Office request may consist of a new phone connection, a LAN drop, a standard workstation, and a telephone.

Structure of the catalog

An entry in the catalog (such as High End PC) may be subdivided into further component entries. These entries are also items in the catalog. When an order is placed, the top-level item (considered a Parent item, and possibly a place-holder phantom item) is ordered. The requester does not need to know any more about the line item than that. If the catalog item has been identified as being a bundle of lower level components, or Children items (also in the catalog), those items will automatically be broken out on the request. Each component then becomes a separate line item with its own costs and delivery dates.

The following table describes an example of a catalog entry.

Relationship	Part No	Catalog Name
Parent	1	High End PC
Child	8	Pentium 3 GHz CPU, 1 GB RAM
Child	12	21" Monitor
Child	25	Keyboard
Child	87	Mouse

When the customer requests a High End PC, all the underlying components are ordered and processed as line item entries.

A customer may also order the 21" Monitor as a separate line item. Each entry is a catalog item in its own right.

Master catalog

The catalog is the most frequently encountered component of Request Management. It includes lists of items that are available for request, as well as bundled Request Categories. Categories include Customer Procurement Requests, Human Resources, and Employee Office Move, along with their components and lists of item types.

The master catalog enables the user to select a predefined set of hardware, software, and services that constitute an item. This item is available for order through the catalog and includes all associated components. For example, the New Employee Setup item within the Human Resources category includes office furniture, CPU with monitor and mouse, and network connectivity. The user orders one item, New Employee Setup, and orders for all its components are sent out. Each component is then tracked as the order is processed, the product is received, and the product is installed or delivered to the user's site.

Many features of the Request Management application are available to the System Administrator only.

Master catalog sections

Master catalog sections are similar to those of any mail order catalog. Desks, chairs, new employee setup, and computer equipment are master catalog sections. Each category divides into a subcategory. For example, relationship parts for a parent item in the catalog, such as High End PC, would include child parts Pentium 3 GHz CPU, 1 GB RAM; 21 inch monitor; keyboard; and mouse. Within each master catalog section, the groups are further subdivided into line item categories.

Phases

Phases determine when and how quotes, line items, and orders are processed. Phases control the activity allowed during each administrative step in the business process flow.

With a quote category, a phase indicates where in the process the quote currently stands, and who can modify the quote. A typical implementation has one quote category with two to three phases.

Phase	Definition
Initial phase	For setting up the quote with approvals.
Ordering phase	For order generation.
QA phase	For verifying successful fulfillment.

For example, where a phase requires that the operator who submitted the quote verify his or her satisfaction, you can set up an operator approval phase. You restrict the close or approval control of the quote to a request coordinator who must contact the originating operator to verify that the operator approves of the quote.

Not all operators have access to quotes and orders at all stages of the process. Typically, an implementation sets up one phase per order category, providing specific instructions for that category. Each line item category has only one phase, which defines the system behavior when that line is selected and processed.

Typically, Request Management is configured for three phases: User entry, coordinator, and ordering.

User entry

During this phase, the average user can access the quote and change information on it. The following is an example of information that the average user can change.

- Create the quote.
- Request items.
- Request a delivery date.

Coordinator

During this phase, the coordinator can replace the user's request for generic items with specific items and add detailed information to both the line item and the quote. The coordinator is responsible for gathering enough information to bill for the items and deliver them properly.

Ordering

During this phase, the quote becomes an order and the actual order is generated. Some considerations for phase definitions include the following.

- Are these phase names acceptable?
- What requirements are there before closing a phase and opening the next?
- Should users who do not have update capability in a phase have browse capability at that phase?
- What is the administrative lead time at the Coordinator phase?
- How long does it take for the coordinator(s) to review a user's request and process it into an order?

User data entry

Depending on your implementation of Request Management, the requester may be required to enter data during the User Entry phase. For example, the requester enters contact information, location, and type of request on a description form.

Coordinator data entry fields

After the requester completes the description form, the request is routed to a coordinator who contacts the requester for specific information. Consider the following.

- What information do you need from the requester for each catalog item you have previously identified?
- What fields must be validated in a certain format, and which must be validated to exist in a supplementary table?

Some data items are defined as coming from another table. A common example of this is contact information.

During the process of opening a quote, the coordinator may be required to supply the first name, last name, department, and phone number of the individual requesting an item.

- Should this information be checked against the contacts table?
- What should be done if the individual is not yet in the contacts table?

Order process

Things to consider when you create the order process:

- How often will orders be generated?
- Will orders be combined to minimize paperwork given to vendors/suppliers?
- What are the basic criteria to combine line items into batches and create new orders?
- How will Request Management interrelate with any external purchasing system already in use?

Notifications and alerts

There are things to consider when you set up notifications and alerts:

- Which events generate notification and alerts?
- For each event, who is to be notified?
- For each event, what type of notification is to be used, such as, pager, e-mail, or fax?
- Which alerts must be defined?

Category	Event	Notify who?	Type of notification
Pager	Pending approval > 24 hrs.	IT Supervisor	e-mail
Pager	Not closed > 2 weeks	IT Supervisor	e-mail

Closing a quote

Consider the following questions when you close a quote:

- How will customer follow-up be handled?
- Will the operators performing follow-ups close the quotes?
- What information must be collected at completion time?

Closing and receiving order line items

Consider the following questions when closing and receiving order line items:

- Who will enter receipt information into Request Management when parts arrive at the receiving dock? If you use Get.It resources, you do not need to receive items into Request Management.
- How will inventory be updated by this information?
- Will scripts be used when technicians close order line items for work/service/labor after their task is completed?

Although request processing through Request Management can be considered the front-end component to interface with an external purchasing system, Request Management does receive against the orders within the system.

If you use an external purchasing system, we recommend that you record the other system's Purchase Order Numbers (usually found on packing slips) on the order in Request Management:

- Create a field on the quote and/or order line item formats associated with the *ocml* file.
- Add the field to the dbDict.

You can now track the actual order generated through the external purchasing system and associate it with the original quote in Service Manager.

- Order line items for services are closed after the work is completed.
- Order line items for parts marked in the Catalog for receipt are received. These parts can be serialized (have a unique serial number) or non-serialized.

After it receives order line items that are combined from several different quote line items, Service Manager displays a distribution screen to post the receipt information back to the quote line items that generated the order.

You can configure the system to automatically close the original quote line item when you complete the receiving and posting process for an order line item.

Configuration Items

Consider the following questions during configuration item (CI) planning:

- Are there plans for posting information about new CIs into the CI tables?
- Is there a schedule in place for implementation of the plan?
- What is the life cycle of the CI?
- What determines a change in the life cycle of the CI?
- Who determines where old CIs go?
- What is the CI trickle process?

Reporting

Reporting planning.

- Are there specific reporting requirements?
- Will the reports be scheduled or on-demand reports? Will Request Management meet the reporting requirements defined in the customer's design document?

Auditing

Consider the following questions during audit planning:

- Which fields will be audited?
- Who will maintain the audit records?
- What are the reasons behind selecting to audit fields as opposed to tracking entire records via paging?

Process validation

You may need to validate the implementation of Request Management to your office's expectations. Changes may be required in both the tool and the process. Determine what you want to accomplish and how you can implement Request Management to meet those requirements.

- Does your office's process make sense in relation to the Request Management tool?
- Does Request Management make sense in relation to your office's best practices and process?

Approvals in Request Management

The approval process automates and formalizes the evaluation of quotes and orders by the appropriate management entities. This process channels the risk, cost, and responsibility associated with a request to the proper levels.

An approval requirement is assigned when an item requires a decision-maker's evaluation. These approvals, though encompassing the line items and part numbers listed on the quote or order, operate

only at the quotes and orders level. The status of individual line items may change (for example, from requested to ordered), but it is only the quote or order itself that is approved or denied.

Those operators authorized to issue approvals within each area and category of requests and orders are listed in the group definition records.

Approvals give controlling authorities (Approval groups) the responsibility of costs and risks associated with a request, the ability to stop work, and to control when certain work activities can proceed. They determine:

- Which categories of catalog items require approvals
- Which catalog items require approvals
- What are the Approval groups
- Who is in each group

Approval classes

Approval classes are used to send approval actions into Request Management. The structure of their event strings is as follows.

Sequence	Description
1	File name of the object to be acted upon. ocmq = quotes ocmo = orders
2	Number of the object to be acted upon.
3	Group for which the operator has rights to approve orders. If left blank, operator has rights to all groups.
4	Action taken, indicating whether approve, retract, or deny.
5	Date and time approval was sent. Mapped data fields containing changes to the record. Processed along with the approval.
6	Identification of the operator who is executing this approval. The approval happens in this operator's security context.

Approval sequence

Approvals can either be approved, retracted, or denied, and pending approvals await one of these actions. Approval groups for a request are placed in sequence, in the order in which their approval is required. If groups have the same sequence number, their approvals can be made independently of each other.

When a pending approval is approved, its status becomes approved and the quote or order moves on to the next phase.

Approval components

The Approval Status of a quote or order remains pending until appropriate approval actions have been taken. The following topics are the components of the approval process:

- Approval Status
- Approval Files and Features
- Approval Actions

Approval status

The approval status of a quote or order is the current state of its required approvals. A record may be waiting for its items to be ordered or received, but no approvals are required for the status to change. A unique status is given to each line item within the quote or order, as well as the quote or order as a whole. Some phases require approvals, as a phase change most often involves the intervention of a decision-maker, indicating the request or order needs to be moved on to another department or area's responsibility.

The approval status of a quote or order reflects the current condition of all subordinate approval requirements associated with the parent quote or order. Request Management includes the following default approval statuses.

Approval Status	Description
Approved	All of the approval requirements have been approved.
Denied	The approval requirements have been denied.
Pending	Active and waiting for an approval action.

Approval files and features

Two primary files contain approval information: the Approval Definitions and the Approval Log.

File Name	Description
Approval Definition (ApprovalDef)	Defines the approvals used by all phases (static file).
Approval Log (ApprovalLog)	Displays current approvals. • An unlimited number of approval requirements can be defined for each item. • Approvals may have conditions attached, such as Total Cost, Lead Time requirements, and Impact.

Approval actions

Approval groups have the option to approve, deny or retract when they face an approval requirement.

Approve

Gives authority to proceed with the item or scheduled work, or to accept completed work. There are four predefined approval types.

- **All must approve** — All Groups/Operators defined in the Approval Definition must issue an approval before the status of the record is set to "approved." If only one or some (but not all) of the Groups/Operators issues an approval, then the status of the record is set to "pending."

  Example: You have three Groups/Operators in an Approval Definition and only one Group/Operator has approved the record. The Approval Status is updated to pending. The Approval table shows one currently pending approval, one future approval, and one completed approval action.

- **One must approve** — The record is approved with one approval from any Group/Operator of the approving group.

- **Quorum** — The record is approved as soon as a majority of the approving group indicate approval.

- **All must approve - immediate denial** — All Groups/Operators must approve the record. The first denial causes the status to change to Deny. All approvers do not need to register their approval action. Otherwise, the record is denied when all Groups/Operators of the approving group issue a denial.

Deny

Removes authority to proceed with an item or scheduled work, and reject completed work.

Retract

Removes a previously approved or denied action. This resets the approval status to pending.

Using approvals

Service Manager user profiles determine whether you see an Approve Requests button in the home menu after you log on. Only users with approval authority have access to the Approve Requests button. If you have access, click Approve Requests to begin.

To access approvals from the quote and order search screens, an operator's profile must meet the following requirements.

- The Approvals parameter for the current area (quote or order) must evaluate to true.
- The Approvals Group field must contain at least one group for the current Area.

Note: If a user does not have access rights to a particular area or to approval records, the status bar indicates this.

Group records

A group in Request Management represents a collection of operators who share a common set of responsibilities. Group definitions specify two divisions within the group: members (formerly reviewers), and approvers. Approvers have approval authority and receive approval information associated with this group. They are a subset of the member group; it is possible for all members to be approvers.

One of the primary purposes for groups is to ensure dissemination of system messages to relevant parties. Member groups or Approval groups may be listed in the *ocmevents* record. If these groups are

not also listed in the group record, they will not receive messages. The individuals of a group have the same authority as identified in their profile, but they do not receive messages.

An operator's authority depends on the operator profile; whether an operator receives messages depends on membership in the group record.

Approval type group options

Approval Type groups have options to approve, deny, or retract approvals for currently pending or future approvals.

Approval Group Options	Description
Approve One | Deny One | Retract One	Ability to approve, deny, or retract a current or future approval for this Approval Type group
Approve Current | Deny Current	Ability to approve or deny current approvals for this Approval Type group
Approve All | Deny All | Retract All	Ability to approve all, deny all, or retract all approvals for this Approval Type group

Approval definitions

The Approval Definition is a static file that defines the approval groups and the approval conditions associated with a particular approval group, as well as their valid functional area.

An Approval Definition record defines the basics of an approval requirement. The approval condition for each requirement can be based on any field in the source record, such as cost, category, assignments, or priority.

Access approval definitions

Applies to User Roles:

Request Administrator

System Administrator

An approval definition record defines the basics of an approval requirement. The approval condition for each requirement can be based on any field in the source record, such as cost and category.

To access approval definitions:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Approval Definitions**.
2. Add optional search criteria, and then click **Search**.

   A record list of current approval definition records opens.
3. Click a record to open it.
   - Click **Next** or **Previous** to scroll through the list of records and see the specifics for each record.
   - Click **Back** to go back to the search screen.
   - Click **Delete** to delete a record.
   - Click **Save** if you make any changes.
4. To add a new record, do the following:
   a. In the **Name** field, clear the name of the current record and type a unique new name for this new record.
   b. Add or change information on the form to set up the new approval definition record. For example, type an **Approval Description** and set the **Approval Type**.
   c. Click **Add** to add the new record.

      Caution: When you are adding a new record from an existing record, make sure you do not click Save. Doing so will replace the existing record with the new record you are attempting to add.

Approval log

The Approval Log lists all the approval actions performed for an approval request.

When you open a quote, order, or line item, the system searches *ApprovalDef* to determine that item's approval requirements. It searches for those definitions that match what appears in the Phase definition (*ocmoptions*) for the item, or in the Catalog definition (*ocmco*).

When the Approval log runs, it includes all currently approved items in the list.

Access approval logs

Applies to User Roles:

Request Administrator

System Administrator

The approval log lists all the approval actions performed for an approval request. When you open a quote, order, or line item, the system searches the approval definitions that match what appears in the phase definition for the item, or in the catalog definition.

To access approval logs:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Approval Logs**.

   An empty approval log form opens.

2. Add optional search criteria, and then click **Search** to generate a record list of current approved records.

3. Click a record to open it.
   - Click **Next** or **Previous** to scroll through the list of records and see the Approval Name for each record.
   - Click **Back** to go back to the search screen.
   - Click **Delete** to delete a record.

Approval groups

The Approvers array of the Group Definition form displays the list of operators who issue approvals for that group. In addition, they can be designated to receive messages about system events involving quotes, orders, or line items.

Membership in this group is specified by the Members array values. Those operators specified in this array can also receive messages when quotes, orders, and line items are entered into the system.

To add a name to an array, update the operator record to use a request profile that specifies the group as an approval group.

What is an approval group?

An approval group consists of a list of reviewers and approvers. If you have approval rights, you may be the only approver, or represent a group whose approval is necessary for the request to move forward in the workflow. If a request requires approval by a named group, you must be a member of that group for your approval to be valid.

Examples of approval groups are listed below.

- Facilities
- Helpdesk
- LAN Support
- M/F Support
- Onsite Support
- WAN Support
- Training
- Telecoms
- Service Desk
- Procurement

Add group records

Applies to User Roles:

Request Administrator

System Administrator

To add group records:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Groups**.

   A blank group definition form opens.

2. Type the **Name** of the new group definition.
3. In the **Area** field, select from Quotes, Orders, Line Items, or All to designate the area for the group definition.
4. Type a **Description** of the group definition.
5. Continue to define the new group definition by completing the fields on the form. For example, set the **Work Schedule** and the **Time Zone**.
6. Click **Add**.

7. Click **More** or the More Actions menu to select **Rebuild Group** to update the Members and Approvers lists and include any profile record Message group additions or changes made in the profile record.
8. Click **Save** to save your changes.

To use an existing group record to create a new group definition:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Groups**.

   A blank group definition form opens.
2. Click **Search** to open a list of group records.
3. Select a record from the list to create your new group record.
4. Change the **Name** of the group definition.
5. Add or change information on the form to select the applicable information for the new group definition record.
6. Click **Add** to add the new record.

   Caution: Make sure that you do not click **Save** because doing so will replace the existing group definition with the new group definition you are attempting to add.
7. Click **OK**.
8. Click **More** or the More Actions menu to select **Rebuild Group** to update the Members and Approvers lists and include any profile record Message group additions or changes made in the profile record.
9. Click **Save** to save your changes.

Edit group records

Applies to User Roles:

Request Administrator

System Administrator

To edit group records:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Groups**.
2. Add optional search criteria, and then click **Search**.

   A list of group records opens.
3. Select a record from the list to update.
4. Review the membership and approval lists for the message group definition. All membership additions or deletions are made through the operator profile record group changes.

   Add or change information on the form to select the applicable information for the group definition record.
5. Click **Save**.
6. Click **More** or the More Actions icon and select **Rebuild Group** to update the Members and Approvers lists and include any profile record message group additions or changes made in the profile record.
7. Click **Save** to save your changes.
8. Click **OK**.

Setting up approvals

Setting up approval authorities and requirements involves several components: Security and Access, Phase definitions, and Catalog features.

In order for operators to have approval authority in Request Management, their operator records must include capability words in the operator record that indicate Request Management access, such as *SysAdmin*, *OCMAdmin*, *OCMO*. Configuring this is explained in Security and Access.

Within Request Management, the user must be included in the membership of a designated approval group, in the *ocmgroups* file. See Approval groups for more information.

The user's authority within Request Management must be defined in the designated Request Management profile, the *ocmprofile* record specified in the operator record. This includes:

- A list of the approval groups for which the user can issue approvals.
- Approval capabilities defined on the various check box tabs of the *ocmprofile* form. See Security and Access for configuration information.
- The approval groups for which this user has approval authority must be included in the definition of the approval that is required for the request or order.
- Approval requirements are defined on the Phase definition control (*ocmoptions*) or catalog part record control.
- Approval Definition (*ApprovalDef*) records must be defined according to the Phase definition approval group requirements. An approval definition record must exist for any group defined as the approval group of a particular Phase definition. See Approval definitions for more information.

Gen by items

Gen by items are those items which cause an approval to be required. These items include the following.

- Individual line items
- Part numbers
- Quotes
- Orders

Although record types listed as possible *Gen by items* can generate individual approval requirements, the approval requirements for the line items and part numbers are consolidated to the parent quote or order. The line items and part numbers themselves are not approved; the parent quote or order is approved.

For example, if you order a New Employee Setup package but you order the executive PC configuration instead of the standard configuration, the executive PC configuration line item is a Gen by item and causes an approval requirement.

Approval delegation

Approval delegation is an optional feature that enables users with approval rights to temporarily delegate their approval authority to another qualified operator. Operators with the **Delegate Approvals**

or **Can Delegate Approvals** option enabled in their application profiles can delegate some or all of their approvals by using the Approval Delegation wizard.

Using the **Approval Delegation** wizard, an operator can grant another qualified operator the right to temporarily view and act on items in his or her approval queue. The wizard offers the following delegation options:

- Delegate all approvals to another qualified operator
- Delegate approvals from a particular application to another qualified operator
  - Delegate approvals directly assigned to you as an operator
  - Delegate approvals assigned to you as a member of an approval group
- Delegate approvals from a specified start date to a specified end date

The **Approval Delegation** wizard enables an operator to create any number of approval delegation combinations, including delegating the same approvals to multiple operators at the same time. Delegators can also update an existing approval delegation to change the delegation start and end dates, as well as change the delegate's name.

Note: HP Service Manager tracks all changes to approval delegations using the standard field auditing capability.

When delegates log on to Service Manager, they see both their own and any delegated approvals in their approval list. For security reasons, delegates always retain their original application profiles and operator records. Service Manager determines what temporary rights delegates have when they view or act on an approval.

What happens when I receive delegated approval authority?

If an operator delegates his or her approval authority to you, HP Service Manager sends an email to notify you of the new approval delegation. You are also notified when a new approval arrives in your approval queue.

Viewing approvals

When you log on to Service Manager, you will see both your own and any delegated approvals in your approval queue.

- To view approvals that another operator has delegated to you, you can use the **Active approval delegations assigned to me** view.
- To view approvals delegated to you in the past, you can use the **Past approval delegations assigned to me** view.
- To see which items in the approval queue are due to an active approval delegation, you can open the **Approve Requests** view from the System navigator. In this view, Service Manager indicates which approvals are in the queue due to an active delegation by displaying a value of **YES** in the As Delegate? column. You can use this view to view, approve, or deny approval requests.

Tracking approval actions

As a delegate, when you act on an approval, Service Manager tracks your actions by adding both your operator name and the delegator's operator name to the approval record.

- Service Manager lists your name in the Operator column of the Completed Approval Actions table.
- Service Manager lists the delegator's name in the Approve For column of the Completed Approval Actions table.

After the approval delegation expires

When an approval delegation expires, you are no longer considered a temporary member of the delegator's approval groups. This means that you can no longer view or act on items that belong exclusively to the delegator's approval groups.The restriction includes any approvals that you previously acted on during the delegation period. In some cases, this may mean that only the delegator can see a particular approval record.

Temporary rights of an approval delegate

An approval delegate temporarily gains the rights for the approval group of the delegating operator while the approval delegation is active. After the approval delegation period ends, the delegate's temporary rights for the approval group revert to their original status.

Approval delegation never changes a delegate's original application profile or operator record. HP Service Manager only changes a delegate's approval group rights in memory when the following conditions occur.

- When the system notifies the delegate
- When a delegate views or acts on an approval

For example, a manager wants to delegate approval authority to a technician. The manager is the delegator in this example, thereby temporarily delegating approval authority for the following application profiles and approval groups.

Application	Profile used	Approval groups
Change Management	APPROVER	CAB
Request Management	APPROVER	ASSET MANAGEMENT
		FACILITIES
		HELPDESK
		LAN SUPPORT
		M/F SUPPORT
		ONLINE SUPPORT
		WAN SUPPORT
		TRAINING
		TRAINING
		TELECOMS
		SUPPORT ADMIN
		SYSTEMS ADMIN
		SOFTWARE
		SERVICE DESK
		PROCUREMENT
Service Desk	INITIATOR	

The technician is the delegate in this example. The technician's original approval authority includes the following application profiles and approval groups:

Application	Profile used	Approval groups
Change Management	TECH	FACILITIES
		LAN SUPPORT
		M/F SUPPORT
		ONLINE SUPPORT
		WAN SUPPORT
Request Management	TECH	
Service Desk	INITIATOR	

When the manager delegates approval authority to the technician, the technician temporarily becomes a member of all of the approval groups that the manager is a member of:

Application	Profile used	Approval groups	Gained as delegate?
Change Management	TECH	CAB	Yes
		FACILITIES	no
		LAN SUPPORT	no
		M/F SUPPORT	no
		ONLINE SUPPORT	no
		WAN SUPPORT	no

Application	Profile used	Approval groups	Gained as delegate?
Request Management	TECH	ASSET MANAGEMENT	Yes
		FACILITIES	Yes
		HELPDESK	Yes
		LAN SUPPORT	Yes
		M/F SUPPORT	Yes
		ONLINE SUPPORT	Yes
		WAN SUPPORT	Yes
		TRAINING	Yes
		TRAINING	Yes
		TELECOMS	Yes
		SUPPORT ADMIN	Yes
		SYSTEMS ADMIN	Yes
		SOFTWARE	Yes
		SERVICE DESK	Yes
		PROCUREMENT	Yes
Service Desk	INITIATOR		no

What happens when I delegate approval authority?

When you delegate approval authority to a qualified operator, the delegate receives an email notification. Delegates are also notified when a new approval arrives in their approval queues.

As a delegator, you always retain your normal approval authority. Both you and any delegates you authorize have the ability to approve items while an approval delegation is active.

Viewing approvals

As a delegator, when you log on to HP Service Manager, you will see both your own and any delegated approvals in your approval queue.

- To view your active approval delegations, you can use the **Approval Delegation** wizard or the **My active approval delegations** view.

- To view your past delegations, you can use the **Copy Approval Delegation** wizard or the **My past approval delegations** view.

Tracking approval actions

When a delegate acts on an approval, Service Manager tracks the delegate's actions by adding both the delegate's operator name and your operator name to the approval record.

- Service Manager lists the delegate's name in the Operator column of the Completed Approval Actions table.
- Service Manager lists the delegator's name in the Approve For column of the Completed Approval Actions table.

After the approval delegation expires

When an approval delegation expires, a delegate is no longer considered a temporary member of your approval groups. This means that the delegate can no longer see or act on items that belong exclusively to your approval groups. The restriction includes any approvals that the delegate previously acted on during the delegation period. In some cases, this may mean that only you as delegator can see a particular approval record.

Delegate approvals to another operator

Applies to User Roles:

System Administrator and other users with approval delegation authority

You can only delegate approvals to another operator if a System Administrator enables the **Delegate Approvals** or **Can Delegate Approvals** option for you in your application profile.

To delegate approvals to another operator, follow these steps:

1. Click **Approval Delegation**. The **Approval Delegation** wizard opens and displays any active approval delegations assigned to you.
2. To create a new approval delegation, click **Add New Delegation**.
3. Select whether to delegate all your approvals or to select approvals.
4. If you are selecting approvals, make the following choices:

a. Choose which application's approvals you want to delegate.

b. Choose how you want delegate approvals assigned to you:

- Assigned as part of an assignment group
- Assigned directly to you as an operator

Note: You can select multiple assignment groups or operators as needed.

5. Select the delegate to whom you want to grant approval authority.

Note: HP Service Manager only displays operators who are eligible approval delegates. If you do not see a particular operator listed as a potential delegate, it means that the operator does not have one or more of the rights required to be eligible for approval delegation. Consult your System Administrator if you want to assign additional rights to a particular operator.

6. Select the date range during which the approval delegation will be active.

Update an active approval delegation

Applies to User Roles:

System Administrator and other users with approval delegation authority

You can change the delegate, the start date, or the end date of any currently active approval delegation by using the Approval Delegation wizard. If you want to use a delegation as a template for a new delegation, use the Copy Approval Delegation wizard.

Note: To change approvals delegated by a specified assignment group or operator name, you must disable the current delegation and create a new one with the new assignment groups and operator names. HP Service Manager requires a new delegation in order to determine which operators are qualified to be delegates.

To update an active approval delegation, follow these steps:

1. Click **Approval Delegation**. The **Approval Delegation** wizard opens and displays any active approval delegations assigned by you.
2. Select the approval you want to edit from the list of active delegations.
3. Click **Edit Current Delegation**.
4. Select the new start and end dates for the approval delegation.

   Note: Service Manager dates always default to midnight (00: 00: 00) of the selected day. If you want to set a different start time, manually type in the new start time using the twenty-four hour: minute: second format notation. For example `23: 59: 59` represents 11: 59 PM and 59 seconds.

5. Click **Next** to save your changes and close the wizard.

Disable an active approval delegation

Applies to User Roles:

System Administrator and other users with approval delegation authority

You can disable any currently active approval delegation. You cannot disable an inactive past delegation.

To disable an active approval delegation, follow these steps:

1. Click **Approval Delegation**.

   The **Approval Delegation** wizard opens and displays any active approval delegations assigned by you.

2. Select the approval you want to disable from the list of active delegations.
3. Click **Edit Current Delegation**.
4. Clear the **Enabled** check box.
5. Click **Next** to save your changes and close the wizard.

Note: To view your past delegations or delegations assigned to you, use one of the default approval delegation views.

Copy an approval delegation

Applies to User Roles:

System Administrator and other users with approval delegation authority

You can use an existing approval delegation as a template to create a new approval delegation. The wizard copies the values from the existing delegation and allows you to change the delegate and the delegation dates. You cannot change the application module, delegated approval groups, or operator when copying an approval delegation. If you want to change these values, you must create a new approval delegation.

To copy an approval delegation, follow these steps:

1. From the **To Do** view, select **Approval Delegation** from the **Queue** list. HP Service Manager displays the Approval Delegation view.
2. From the **View** list, select either **My active approval delegations** or **My past approval delegations**.
3. Select the approval you want to copy from the list of approval delegations.
4. Click **Copy Approval Delegation**. Service Manager displays the Copy Approval Delegation wizard and automatically fills in the delegate name, the delegated module, approval groups, and operator.
5. Select the new delegate if needed.
6. Select the new delegation start and end dates.
7. Select **Enabled**.
8. Click **Next** to create a new approval delegation.

Views available for approval delegation

HP Service Manager provides default views for delegators and delegates to manage approval delegations. Administrators can also view approval delegation records directly from the Database Manager by viewing the ApprovalDelegation table.

View	Description	Available Actions
My active	A list of the currently active approvals that you delegated to other	• Start the

View	Description	Available Actions
approval delegations	operators. This view does not display future delegations because they are not currently active.	Approval Delegation wizard • Export • Print
My past approval delegations	A list of the inactive approvals that you delegated to other operators in the past.	• Start the Copy Approval Delegation wizard • Export • Print
Active approvals assigned to me	A list of the currently active approvals delegated to you. This view only displays approvals where you are the active delegate. Use the other views to display your past or pending delegations.	• Export • Print
Past approvals assigned to me	A list of the inactive approvals that other operators have delegated to you in the past.	• Export • Print

Note: If you create or update an approval delegation record you may need to use the Service Manager **Refresh** option in order for the views listed above to display the new delegation record.

Categories

Categories within Request Management combine items that would normally be listed independently. Without categories, the request process would be more time-consuming. Categories reduce or eliminate the need to search for items and services.

When you create a master category for the catalog, you begin a process which contains ever-increasing levels of specification.

Request categories

Service Manager has three out-of-box request categories from which you can choose to order products and services, and accomplish an employee office move. When you open a request, you see the following out-of-box request category selections:

- Customer Procurement Requests
- Human Resources
- Employee Office Move Process

After you select a request category, you see the master catalog categories.

Master catalog categories

Master catalog categories provide a bundled approach to ordering from the catalog that combine related categories and line items. For example, you can add labor to more than one master category so that it is not overlooked and does not create delays if it is requested too late.

Master catalog categories and line items are displayed directly after the quote categories. For example, when you select quote category Customer Procurement Requests, Service Manager displays the Master Catalog.

The master catalog categories combine related items and services. For example, select Computers & Related for the following item types and services:

- Computer Accessories
- Desktop Computers
- Handheld and PDAs
- Hardware Requests
- Request Hardware Upgrades
- Installation Services

- Individual Monitors
- Notebook Computers

If you want a computer monitor only, click Individual Monitors.

The summary of New Employee Setup includes furniture, computer equipment, installation services, and everything needed for a new employee. You can add items to, or take them away from, your order as your needs change.

Line item categories

Line item categories are smaller and more numerous than master catalog item categories. Line item categories are the building blocks of master categories; however, they are still categories, built of parts. The parts are individual line items, such as an DEFAULT mouse or an ABC 17" monitor, which you can find in a line item category called Computers & Related along with many other individual line items associated with a computer setup. Line items include both specific parts and services.

You can restrict line item categories to certain quote and order groups the same way as master catalog categories. On the first page of the catalog, select from the master catalog category. The catalog displays line item categories in subsequent catalog pages.

The line item category is the next step down in specification from the master category. Line items are more numerous and specific to the individual groups of products a company holds in inventory than are the master categories. Line items include both specific parts and services.

Selecting a line item category from the catalog presents a list of actual line items, or parts, available for that category.

Phantom line items

Phantoms are place holders, or pseudo parts, used to organize a collection of multiple items. They are used to provide flexibility in defining component relationships within the catalog, and are usually not physical items. A phantom can be considered an umbrella type of level for several parts selections of the same type. For example, beneath the New Employee Setup master category the New Accounts & Access line item provides a selectable option. This item itself does not display on the quote or order when it is selected; the catalog displays each of the associated parts as individual line items, such as internet access, email account, and network ID.

A phantom part is a parent of the specific items within it, and you can select specific items (or parts) through the phantom part.

Phantoms are assigned part numbers, but they themselves usually are not ordered or placed on a quote.

There are two ways to designate a listing as a phantom.

Designate a model file as a phantom

Applies to User Roles:

Request Administrator

System Administrator

To designate a model file as a phantom:

1. Click **Request Management** > **Maintenance** > **Supporting Files** > **Model**.
2. Add optional search criteria, and then click **Search**.

   A list of model records opens.
3. Select the target model record to update.
4. Select the **Reorder** tab.
5. In the **Reorder Type** field, select **Phantom**.
6. In the Catalog tab, do the following:
   a. Select the **Part Conditions** subtab.
   b. Clear the **Copy to LI?** field.
7. Click **Save**.

Phases

Phases determine when and how quotes, line items, and orders are processed. Phases control the activity allowed during each administrative step in the business process flow.

With a quote category, a phase indicates where in the process the quote currently stands, and who can modify the quote. A typical implementation has one quote category with two to three phases.

Phase	Definition
Initial phase	For setting up the quote with approvals.
Ordering phase	For order generation.
QA phase	For verifying successful fulfillment.

For example, where a phase requires that the operator who submitted the quote verify his or her satisfaction, you can set up an operator approval phase. You restrict the close or approval control of the quote to a request coordinator who must contact the originating operator to verify that the operator approves of the quote.

Not all operators have access to quotes and orders at all stages of the process. Typically, an implementation sets up one phase per order category, providing specific instructions for that category. Each line item category has only one phase, which defines the system behavior when that line is selected and processed.

Typically, Request Management is configured for three phases: User entry, coordinator, and ordering.

User entry

During this phase, the average user can access the quote and change information on it. The following is an example of information that the average user can change.

- Create the quote.
- Request items.
- Request a delivery date.

Coordinator

During this phase, the coordinator can replace the user's request for generic items with specific items and add detailed information to both the line item and the quote. The coordinator is responsible for gathering enough information to bill for the items and deliver them properly.

Ordering

During this phase, the quote becomes an order and the actual order is generated. Some considerations for phase definitions include the following.

- Are these phase names acceptable?
- What requirements are there before closing a phase and opening the next?
- Should users who do not have update capability in a phase have browse capability at that phase?
- What is the administrative lead time at the Coordinator phase?
- How long does it take for the coordinator(s) to review a user's request and process it into an order?

Add a quote phase

1. Click **Request Management** > **Quotes** > **Quote Phases**. A blank phase definition form opens.
2. Click **Search** to generate a record list.
3. Click the name of a phase definition on which you want to base your new quote phase. The phase definition form opens, containing the definition data of the selected quote phase.
4. Clear the name from the **Name** field, and then type a unique name for the new quote phase.
5. Modify the new phase record by providing your information in each of the following tabs. The information should be relevant to the system behavior and level of control you want an operator to have on a quote in this phase.
   - Definition
   - Controls - When updating or adding a new phase definition record, you can provide both the button label and the balloon help text in the Close Description field. The format is `Button label;Balloon help`.
   - Alerts
   - Approvals
   - Model/Line Items
   - Scripts/Views
6. Click **Add** to add the new phase to the system.

   A list of events opens.

Caution: Make sure that you do not click Save because doing so will replace the existing phase with the new phase you are attempting to add.

7. To restrict the new quote phase to certain events, select only those events.
   a. Double-click an event and review the event form to make sure you want to add the phase to this event.
   b. To go back to the list of events and continue to browse through the events, click **Back**.
   c. To add the phase to this event, click **OK**.
   d. Continue steps a. through c. to select the applicable events for this new quote phase.
   e. When you are done, click **Back**.
   f. Click **OK**.
8. To add the new quote phase to all events, do the following:
   a. Click **Add to All**.
   b. Click **OK**.

Add a line item phase

1. Click **Request Management** > **Line Items** > **Line Item Phases**. A blank line item phase definition form opens.
2. Click **Search** to generate a record list.
3. Click the name of a phase definition on which you want to base your new line item phase. The phase definition form opens, containing the definition data of the selected line item phase.
4. Clear the name from the **Name** field, and then type a unique name for the new line item phase.
5. In the **Parent Area** field, select Quotes or Orders as a valid parent area for a line item under this phase. When this field is left blank, all line items under this phase use this phase definition.
6. The **Modify Dates** field in the Model/Line Items tab enables you to change the ordering dates of a line item. To have the ability to change the dates, type **true**. If you leave this field blank or if it is set to false, you cannot modify the dates.

7. Modify the rest of this new phase record with your information in the following tabs:
   - Definition
   - Alerts
   - Approvals
   - Model/Line Items
   - Scripts/Views
   - Reports
8. Click **Add** to add the new phase to the system.

   A list of reports opens.

   Caution: Make sure that you do not click Save because doing so will replace the existing phase with the new phase you are attempting to add.
9. Double-click the report name to add the phase to the report.

   A list of events opens.
10. To restrict the new line item phase to certain events, select only those events.
    a. Double-click an event and review the event form to make sure you want to add the phase to this event.

    b. To go back to the list of events and continue to browse through the events, click **Back**.

    c. To add the phase to this event, click **OK**.

    d. Continue steps a. through c. to select the applicable events for this new line item phase.

    e. When you are done, click **Back**.

    f. Click **OK**.
11. To add the new line item phase to all events, do the following:
    a. Click **Add to All**.

    b. Click **OK**.

Add an order phase

To add an order phase:

1. Click **Request Management** > **Orders** > **Order Phases**. A blank order phase definition form opens.
2. Click **Search** to generate a record list.
3. Click the name of a phase definition on which you want to base your new order phase. The phase definition form opens, containing the definition data of the selected order phase.
4. Clear the name from the **Name** field, and then type a unique name for the new order phase.
5. Modify the new phase record with your information and be sure to update the fields in the following tabs:
   - Definition
   - Alerts
   - Approvals
   - Model/Line Items
   - Scripts/Views
   - Reports
6. Click **Add** to add the new phase to the system.

   A list of events opens.

   Caution: Make sure that you do not click Save because doing so will replace the existing phase with the new phase you are attempting to add.
7. To restrict the new order phase to certain events, select only those events.
   a. Double-click an event and review the event form to make sure you want to add the phase to this event.
   b. To go back to the list of events and continue to browse through the events, click **Back**.
   c. To add the phase to this event, click **OK**.

d. Continue steps a. through c. to select the applicable events for this new order phase.

e. When you are done, click **Back**.

f. Click **OK**.

8. To add the new order phase to all events, do the following:
   a. Click **Add to All**.

   b. Click **OK**.

Quotes

A Request Management quote defines basic request information such as requester, required dates, coordinator, and description. A quote does not contain detailed parts information. One quote can contain many line items, collectively identifying the goods and services a user is requesting. Once approved, one quote can generate one or more related orders.

Orders

An order is a formal request that a vendor/supplier perform a service or deliver a product to a particular destination. The Ordering function of Request Management is particularly useful when vendors/suppliers are included in the business process. Vendors/suppliers are both internal and external providers of parts and services.

The best way to access order information is directly from line item records, rather than order records themselves. The line items provide more detailed information about items being ordered than the order header fields. More useful query fields (such as Vendor Name or Assignee) are displayed through line items. Here vendors/suppliers can access information about their work or procurement obligations.

Orders offer these benefits:

- The ability to track vendors/suppliers
- Preparation by service organizations (such as internal vendors/suppliers) for upcoming work orders
- Simultaneous updating or closing order line items without interfering with others' access to the quotes
- The use of Purchase Orders

Order generation process

Orders generate in the background. The Request Management order generation process controls several features:

- Order frequency
- Treatment of on-hand inventory
- Combining line items into a common order line item

Locks

Request Management uses locks which restrict access to records to ensure that multiple users are not applying updates to the same record at the same time. Locking is implemented at the control item level when a quote or order is viewed. When the quote or order is locked, all associated items are locked as well, including line items. For this reason, processing, such as the movement between and through phases, cannot occur while the user is modifying the control item records.

The system's background order processing attempts to lock the parent quotes of line items being processed or ordered. Therefore, certain implementation issues need to be considered. These include the following:

- Scheduling of background order processing
- Establishing the use of the Inactivity Timer (for parameters to disable inactive users)

See the Server Security Help for details about the Inactivity Timer.

Background processing

The background processor (*ocm*) manages Request Management ordering and event processing. This processor's interval is set by default to check every 60 seconds for *ocm* schedule records to process.

There is one *ocm* class schedule record for the ordering process.

- OCM Create Order
  - Also called Background Order Demand
  - (for batch -- demand order processing) Executes the *rmo.create.order* application.

Batch ordering

Batch ordering is controlled by the demand schedule records. There can be more than one of these demand schedule records in the schedule file at one time, to be processed at different intervals and executing different queries.

These schedule records determine when and how often to generate orders. They also define what field values cause a break to a new order, as quotes are processed. The options here include values found in the following.

- vendor
- vendor.contract.no
- trans.type
- bill.to.code
- ship.to.code
- shipping.terms
- tax.rate
- payment.terms

Determining what causes a break to a new order line item is also contained in the demand schedule records. The options include values from the following.

- payment.freq
- no.of.payments
- part.no
- unit.cost
- unit.of.measure
- discount

Processing control fields

Field	Description
Line Item Query	The query overrides the default query run against the *ocml* file. For example: `avail.to.order=true and reorder.type="b"` and `open=true and quantity.balance>0 and target.order<=tod()`
Order Category	When you specify an order category while you create an order, your order category overrides the default order category. The default order category is that associated with the line item as defined in the modelvendor record.

Order breaks and line item breaks

While tailoring an implementation's order process, the Order Breaks and Line Item Breaks array fields on the Demand Schedule record provide a list of field names in a sequence that must coincide with a key in the *ocml* database dictionary record. The system checks for field name differences as each record is processed, and this determines when to complete the current order or line item and start a new one (for example, when to "break").

Important: In the base system's *ocml* database dictionary record, the key contains five fields. Do *not* modify this key.

- *avail.to.order*
- *reorder.type*
- *open*
- *quantity.balance*
- *target.order*

OCM order create for Line Item Schedule record

- Also called Background Order Demand.
- For batch -- demand order processing. Runs the *ocmo.create.order* application.
- Uses high breaks for order breaks (for example, creates new order record).

- Uses low breaks for line item breaks (for example, creates a new line item entry within current order).
- Will automatically use the “backend” field as the first high break. This field is used when certain orders are sent to an external system.

Routing orders to external purchase systems

The processing for orders is the same as for quotes. For example, you can define approvals, alerts, associated events and messages for an order.

You have several methods available, specifically designed for orders, to interface with an external system.

- You can send email notifications.
- In Format Control, you can create an *eventout* record.
- If batch processing is used, you can print the order to a specific printer.

  Note: Printing the immediate ordering type is not supported.
- Alternatively, you can perform a file unload process for recently created orders, and move the file to an external procurement system with receipt information sent to Service Manager.

Prepare for background ordering requirement

You can configure Request Management to send orders to an external system automatically. When the background ordering of events and line items requirements is in place, those items are ready to be ordered (*avail-to-order* items). Orders created with an external back end defined are routed to the external system, according to the order’s *ocmbackend* definition.

Define Line items as ready to order on the *ocml.view.default* form.

Closing and receiving

After the quote is officially entered into the system, approvals are made, and the associated orders are generated, the order process moves into a receiving mode and closes the individual line items.

Line items, which make up orders, are traced back to the initiating quote which can be closed after all items (parts and services) are received and closed. Several automatic and manual procedures track and associate related processes.

Closing and receiving order line items

Consider the following questions when closing and receiving order line items:

- Who will enter receipt information into Request Management when parts arrive at the receiving dock? If you use Get.It resources, you do not need to receive items into Request Management.
- How will inventory be updated by this information?
- Will scripts be used when technicians close order line items for work/service/labor after their task is completed?

Although request processing through Request Management can be considered the front-end component to interface with an external purchasing system, Request Management does receive against the orders within the system.

If you use an external purchasing system, we recommend that you record the other system's Purchase Order Numbers (usually found on packing slips) on the order in Request Management:

- Create a field on the quote and/or order line item formats associated with the *ocml* file.
- Add the field to the dbDict.

You can now track the actual order generated through the external purchasing system and associate it with the original quote in Service Manager.

- Order line items for services are closed after the work is completed.
- Order line items for parts marked in the Catalog for receipt are received. These parts can be serialized (have a unique serial number) or non-serialized.

After it receives order line items that are combined from several different quote line items, Service Manager displays a distribution screen to post the receipt information back to the quote line items that generated the order.

You can configure the system to automatically close the original quote line item when you complete the receiving and posting process for an order line item.

Receipt verification

The receiving process:

- Log the receipt of serialized equipment. The Catalog indicates whether an item is to be received and whether it is serialized.
- Serialized items must:
  - Be received.
  - Have a quantity of 1.
  - Have a Serial Number.
  - Post data to the model record.
  - Distribute (post) the received quantities to the original quote line items.

Confirmation

You can configure your business rules and user profiles to display a confirmation screen when you click **OK** to confirm receiving and distribution.

Users must provide confirmation for the process to complete, terminate, or reset. Depending on the process flow, receiving personnel may be able to provide this information.

The out-of-box system assigns the receipt to the first available line items.

- If there are any dependent line items ready for ordering, the system marks them accordingly.
- If there are no further line items to be ordered, the order goes to the next phase.
- If there is no next phase, the order is closed.

Receiving log

The receiving log tracks the receipt of serialized and non-serialized equipment. The system populates this file after the receiving process.

A benefit of the receiving log (*ocmlrec*) record is that it provides the serial number of the particular Configuration Item (CI) or device for posting to the Configuration Management application.

Link records

You can copy data from different data records to a line item via a standard link record. Request Management checks for the following link records for the indicated process.

Note: The following are the Request Management link records which should be modified according to any renaming of Request Management files or forms.

Link Name	From	To	When Used
ocml.copy.quote	ocmq	ocml	When opening a line item from a quote
ocml.copy.order	ocmo	ocml	When opening a line item from an order
ocml.copy.model	model	ocml	When opening a line item from a catalog part
ocml.copy.modelvendor	modelvendor	ocml	When opening a line item from a catalog part and the user selected a vendor/supplier
ocml.receive.copy	ocml	ocmlrec	When receiving process copies data from the line item to the receiving log

If found, Request Management copies data from the source record to the line item based on the data fields defined at the detail level of the first element in the applicable link record.

Do not use these link records for any other purposes. Request Management always uses the first element of the link record for copying data from the source record to the line item. It does not examine any other link elements.

For more information on how to use link records and the roles played by link records, see the related topics.

Format control and link records

The Format Control record for the *ocmlrec* form updates the receiving log. You can tailor it to implement the posting process.

The link record *ocml.receive.copy* copies data from the line item to the receiving log. You can modify this link record (and the *ocmlrec* database dictionary record) to track additional data fields.

Vendors/Suppliers

The vendors/suppliers may be either external suppliers or internal departments. We recommend that you fill in the first 7 items. You may have as many vendors/suppliers as you need.

- Vendor/Supplier Information
- Catalog Description
- Vendor/Supplier Name
- Vendor/Supplier Part No.
- Transaction Type (purchase, lease, etc.)
- Cost (in $)
- Labor Hours
- Labor Cost/Hour
- Lead Time
- Overtime Cost/Hour
- Payment Frequency
- No. Of Payments
- Billing Code
- Shipping Terms
- Vendor/Supplier Contract No.
- Priority
- Type of Order (purchase, lease, return, rental, work)
- Warranty
- Discounts

Related records

You can open a Change Management change or an Incident Management incident record from Request Management. The new record is related to an existing request.

When in a service request record, the More Actions menu enables you to work with incidents, changes, and Service Desk interactions. It also enables you to:

- Create an association between existing records.
- View a list of associated records.
- Create new records.

Printing lists and detail records in Request Management

The Request Management interface allows users to print lists and detail records for quotes, orders, and line items.

Use Search to display the list of records or a detail record. Follow the instructions below to print in the windows client or the web client:

In the windows client:

1. Click **File** > **Print** or click the **Print** icon.
2. Select one of the following options:
   - **List**: Print the list of records.

     You can specify the **Start** and **Count** fields to print a number of consecutive records in the list.
   - **Detail**: Print a single record.
3. Select the printer and then click **Print**.

In the web client:

1. Do one of the following actions:
   - Print the list of records: Click the **Print** icon on the Record List toolbar or press Ctrl+Alt+P.
   - Print a single record: Click the **Print** icon on the Record Detail toolbar or press Alt+P.
2. Perform one of the following actions in the newly-opened browser window:
   - Right-click the page and then click **Print**.
   - Press Ctrl+P.
3. Select the printer and then click **Print**.

Business Rules and Workflows

Business rules and workflows can be defined for each type of request, and can include routing, required approvals, notifications and alerts, fulfillment tasks, escalations, assignment, and so on.

For example, the Service Catalog module lets the catalog manager define how the service request needs to be routed for fulfillment.

Request processing is automated using other appropriate HP Service Manager modules. For example, the HP Service Manager Request Management module may be used to automate a “new employee setup” request, because this type of request has goods and services components that require defined ordering and sequencing processes that can be facilitated by the Request Management module.

Other types of service requests can be fulfilled in the Service Desk, Change Management, or other modules.

A catalog administrator defines the modules required to fulfill each service catalog item. Fulfillment can include creating sequenced or parallel tasks to fulfill the request, routing tasks to appropriate groups or staff, gathering required approvals, generating notifications and alerts, measuring response time based on applied SLAs, and so on.

The service catalog uses an open connector architecture, where new fulfillment connectors can be added to integrate with third-party or legacy tools.

Service Catalog Request Status

The requester is able to use the same web application to monitor the Service Catalog request status.

He or she can simply look at the list of open Service Catalog requests and follow the progression of the Service Catalog request through its lifecycle. The status is displayed in the list.

It is possible to gain more insight into what is happening during those phases. The requester has the ability to monitor the pending approvals, or to view the approvals that have already been granted.

Thus they know who might be holding up their Service Catalog request during the approval phase.

When the Service Catalog request is approved, the user has, in some cases, the ability to follow the progression of the Service Catalog request through fulfillment in greater details. From the request details screen, the user can click on the View Related Records link. For example, for a Service Catalog request that is being fulfilled through a change request, it is possible to follow the lifecycle of the change request.

Service Catalog Request Progress

HP Service Manager time and date stamps each Service Catalog request, and provides an audit trail capability that identifies each step taken in the resolution of Service Catalog request throughout the Service Catalog request lifecycle. Each time the Service Catalog request is updated (whether manually or automatically), a separate historical activity is created for the Service Catalog request. An authorized user may leaf through each historical activity to develop a comprehensive understanding of the history of the record and its resolution, including which operators took what actions at what times.

HP Service Manager also tracks the Service Catalog request against defined service levels. Once the Service Catalog request is created, HP Service Manager automatically assigns appropriate service level targets, based on the request type, the requester, the category of the request, or other defined parameters. Progress against service level targets is captured in the request record; imminent or actual breaches of service levels can trigger alerts and escalations.

Service Catalog Request Cancellation

End users can submit Service Catalog requests through the HP Service Manager Service Catalog module, view the status of their Service Catalog requests at any time through an easy-to-use web interface, modify existing Service Catalog requests (for upgrades or downgrades, for example) or cancel Service Catalog requests that are no longer necessary.

Request Fulfillment

Once a service request is created in the Service Catalog module, HP Service Manager routes the request to the appropriate fulfillment module (Request Management, Change, and so on), and the fulfillment

record is automatically routed to the appropriate group or staff member for completion. Routing is based on business rules defined to meet your requirements.

Alerts can be triggered when services are added to a fulfillment group's queue.

Request Models

The HP Service Manager Request Management module can accommodate requests that have complex sequential and parallel tasks; multiple, tiered approval requirements; complex routing requirements; and so on.

Demands Measurement

HP Executive Scorecard measures ongoing demands. Demands can be measured for each service. A demand could be a proposal, scope change or other request types.

Financial Approval

The Service Catalog module supports routing end-user Service Catalog requests for required financial approvals.

The approval rules are defined in the Service Catalog. Some approval rules are defined globally and apply to all Service Catalog requests that match the required conditions (approvals can trigger based on the total price of the Service Catalog request). Other approval rules are directly attached to catalog items, and provide additional control in the service provisioning.

The requesters are able to review the progress of the approval process at any time by looking at their open Service Catalog requests in the web interface.

Moreover, approval routing can also be performed in other HP Service Manager modules used to fulfill requests. For example, the HP Service Manager Request Management module includes capabilities to route a request for multiple sequential or parallel approvals based on the type of request, the dollar value of the request, and so on.

Self-service Requests

Employees shop for service items using an easy-to-use web interface. Following is an example:

1. After selecting New Request, the Catalog is displayed to the User showing the top level categories.
2. When the user selects a category, for example, "Personal Productivity Services", the list of categories or items group under Pers.Prod.Svx is displayed.
3. Selecting an item from the Personal Productivity Services list, then the next level of the category is displayed. For example, the user might select "Hardware bundles".
4. In this example, hardware bundles include items that can be ordered. The user can select an item to order. If there are specific questions that must be answered, they are prompted for the required information.
5. The user selects “Add to Cart” to save the item.
6. A shopping cart can be viewed, canceled, saved for ordering at a later time, modified, or saved as a template for placing future orders for the same set of items.
7. Once the user is ready to order the items in the cart, he/she submits the order, at which HP Service Manager asks for the information about the request recipient and delivery information.
8. HP Service Manager prompts the user to enter the request recipient and delivery information.
9. Once the Service Catalog request is submitted, HP Service Manager displays the submitted Service Catalog request with the assigned ID.

Record Content

Each Service Catalog request record has several fields to document the details of the Service Catalog request. The Service Catalog request record captures the request initiator, and the service recipient, if different from the request initiator. The Service Catalog request record displays the fields to record the services requested. Each Service Catalog request record has a field to capture the request closure category. Activities performed to fulfill the request are captured in the Activities section and are date and time stamped with the name of the person performing the activities. HP Service Manager can support additional fields or even additional tables if necessary to meet customer needs.

Service Catalog Request Status

Each Service Catalog request record has a status field that indicates the current status of the Service Catalog request. HP Service Manager populates this field automatically based on work performed to

date on the Service Catalog request. Status codes, as well as customer-defined status codes, are supported.

The requester is also able to check the current Service Catalog request status in the Service Catalog web interface.

Category of Support Request and Service Catalog Request

For support requests, the category determines the workflow used to fulfill the support requests. Combined with the area and subarea, it also is used for to report results and to determine the knowledgebase assignment for the event.

Depending on user's selection on support request category, the Escalate Interaction wizard opens one of the following wizards:

- Escalate Interaction - Complaint wizard: creates a new incident record in the background, and assigns it to the service desk manager.
- Escalate Interaction - Incident wizard: requests further information, including location and assignment, and create an incident record.
- Escalate Interaction - RFI wizard: creates a new incident record in the background with the default category Request for Information (RFI). The RFI incident record is assigned to the service desk assignment group.
- Escalate Interaction - RFC wizard: creates a new change request in the background, in the review phase, with the category "default."

For Service Catalog request created in the Service Catalog module, the Service Catalog request is routed to the HP Service Manager module responsible for fulfilling the Service Catalog request. The request fulfillment record is automatically created, categorized and classified based on business rules built into the request fulfillment process. Each customer can create business rules to meet individual requirements.

The module responsible for fulfilling the request is defined in the catalog item record.

In addition, a category corresponding to the fulfillment module is attached to the catalog item. This helps ensure not only that the Service Catalog request will be sent to the appropriate fulfillment engine, but also that it will be properly triaged by the fulfillment teams.

Priority, Impact, and Urgency identification

Priority, impact, and urgency indicators can be assigned automatically or manually to fulfill Service Catalog requests.

Impact is based on the scope of users impacted – the wider the users impacted the higher the impact. Urgency is based on the user input. HP Service Manager automatically calculates the value for Priority based on the values specified for impact and urgency.

When the Service Catalog request is sent for fulfillment, however, the corresponding fulfillment modules can reevaluate the impact according to its own rules (for example, a change request, incident, or request record).

Request Closure Category

Each request fulfillment record has a field to capture the closure category.

Request Charges

HP Service Manager can track labor costs and parts costs in service request fulfillment processes.

Meanwhile HP Service Manager can pass cost and billing information for goods and services to an external financial tool. In out-of-box, integration is created using HP Connect-It between HP Service Manager and HP Asset Manager.

Costs of Request Fulfillment

Each request displays the fulfillment cost (including incremental ongoing costs associated with service options).

Request Escalation: Functional Escalation

When a Service Catalog request is approved, HP Service Manager automatically assigns the Service Catalog request to an individual or support group based on pre-defined parameters, such as the items ordered.

System administrators can define escalations and assignment rules to meet your requirements. For example, when fulfilled by the Request Management module, the Service Catalog request triggers the creation of a quote record. The category of the quote record dictates assignment to an individual or a service group. The role of the requester can dictate the service levels assigned to the request for the response and resolution time frame.

Service desk technicians can also manually escalate support requests.

Request Escalation: Hierarchic Escalation

HP Service Manager provides alerts and escalations, including the following:

- Escalations. Business rules can be used to trigger automated hierarchical escalation of a request if the status of the request remains unchanged for too long, the request is “bounced” too often between assignment groups, or if the request meets other predefined parameters or thresholds. Users can also manually escalate a request. The administrator can configure HP Service Manager to act in certain ways should these rules be breached. For example, if a request remains in open state for too long, HP Service Manager can be configured to escalate the record to the assigned operator’s manager.
- Alerts. Some modules have the ability to set criteria for the generation of alerts.
- For more sophisticated, cross-module alerts and escalations, the HP Service Manager Service Level Management module is used to set Service Level Targets and Service Level Agreements with associated actions for record SLA breaches.

Escalation thresholds can be defined for Service Catalog requests as well as the request fulfillment records. Escalations can also be associated with SLAs defined for Service Catalog requests or request fulfillment records.

Integration: Service Desk or Incident Management

In HP Service Manager, the service requests are stored as Service Desk interactions of a specific type. HP Service Manager Service Catalog can easily integrate with the Incident Management module through open fulfillment connector architecture.

Integration: Change Management

Change Management is a standard fulfillment engine for service requests.

HP Service Manager will copy shared information from the service request to the change request record and automatically link the records. Links between these records, once created, cannot be broken by users. Links to other records are listed in each linked record, and users can click on links to access other linked records.

This link allows HP Service Manager to correctly propagate the status changes between the change request and the service request.

Request Integration: Release and Deployment Management

All HP Service Manager modules are fully integrated. Release and Deployment Management records can be quickly opened from a service request, if required. HP Service Manager will copy shared information from the service request to the release request record (created in the Change Management module) and automatically link the records. Release request records can also be opened automatically from service request records based on business rules defined to meet your needs. Links between these records, once created, cannot be broken by users. Links to other records are listed in each linked record, and users can click on links to access other linked records.

Request Integration: Configuration Management System

One option in a catalog item is to create a subscription to a service (or to any type of configuration item).

When the service request is created for this type of catalog item, the service request is linked to the CIs through the catalog items it references.

Integration: Service Catalog

In HP Service Manager, the creation of a Service Catalog request can starts with the Service Catalog by using Self-Service web or reported directly to service desk via phone or email. One or more entries in the catalog are linked to the Service Catalog request through a cart item (request line).

Integration: Third-Party

Bi-directional integration with third-party solutions can be created using HP Connect-It or the Web Services API in HP Service Manager.

Request Management Predefined Reports

HP Service Manager includes two out-of-box options for generating operational reports using key performance indicators: Service Manager Reports and HP Service Manager Crystal Reports. These tools allow users to generate predefined and ad hoc reports to display any information. The following describes these tools.

Service Manager Reports

The Service Manager Reports module provides reports and dashboards to enable faster analysis and improved time to resolution. These reports organize data into various chart formats, and the dashboards display one or more reports to provide global information about critical activities or metrics. These reports display relationships among categories of data. For example, one report might display the number of incidents per customer, while another displays the number of incidents by priority. Viewing these reports together as a dashboard enables you to make better business decisions, such as assigning resources to close incidents. Report Managers can share a report or dashboard. The SM Reports module aims to provide a lightweight reporting feature for active operational data, and the reports are therefore designed to retrieve, represent and visualize up to 100,000 active records out of millions. To define analytical reports against the entire data set, you need to use a third-party business intelligence tool.

Request Management Crystal Reports

Request Aging Report: This report enables the user to review the top 20 categories of requests which are included the highest 90th percentile for requests duration submitted in the last 30 days. It also enables the user to review the distribution of requests for each category by request duration and by request submit date.

Service Desk Reports

- Escalated Interactions: This report provides the breakdown of interactions that have been escalated to change requests, incidents, known errors, and quotes.
- First Time Fixed Interactions: This report enables the user to review, for a given time period, the percentage of interactions closed by the Service Desk upon the first contact without reference to other levels of support.
- Interactions Closed in a Given Year: This report enables the user to review the interactions closed in a given year by months.

- Interactions Resulting in Related Issues: This report enables the user to review interactions which result in related issues for a given time period.
- Number of Service Desk Requests by Department: This report enables the user to review the top ten departments which utilize the help desk in a given time period.
- Service Desk Interactions Opened and Closed: This report gives the user the ability to review, for a determined period, a breakdown of open and closed Service Desk interactions by categories and their associated areas.
- Top 20 Operators by Average Interaction Time in Last 90 Days: This report enables the user to review the analysis of how long, on average, the top 20 operators take to handle an interaction in past 90 days.

Trends Identification

HP Executive Scorecard measures trends for each metric. All request types are collected by HP Executive Scorecard from HP Service Manager and stored in a data warehouse with scores and trends.

Satisfaction Survey

Service Manager provides a native survey tool, which enables you to manually send a survey from a request record or to set a schedule survey by applying the internal out-of box survey connector.

Service Manager also provides other survey integration solutions. For more information, see "Survey introduction" on page 1.

Service Catalog Request Record

Service Catalog requests are created and approved in the HP Service Manager Service Catalog module.

While IT Technicians are able to create Service Catalog requests using the HP Service Manager Windows or Web clients, business users can do so through a simple, easy-to-use web client.

At this point, a Service Catalog request record is created, and a unique number is displayed back to the requester.

In HP Service Manager, Service Catalog requests are stored as Service Desk interactions but processed in other HP Service Manager modules, such as Change or Request Fulfillment.

Service Catalog Description

The catalog manager can also:

- Define Service Options for a Service Catalog item (for example, specify the color or size of a selected item). The options selected can be configured to trigger a cost adjustment for the item ordered.
- Expose optional service levels.
- Limit user's access to Service Catalog items based on their assigned role.

Finally, the management user interface also allows catalog managers to duplicate existing Service Catalog items, thereby facilitating the creation of new Service Catalog items.

After a Service Catalog item is defined, its details can be exposed to end users browsing or requesting services on the corporate intranet. For example, an e-mail Service Catalog item may list available options, costs, and service levels.

HP Service Manager includes dozens of predefined Service Catalog items and bundles that span major categories. All the services can include Service Descriptions so the user making the request has clear information on what each service truly includes.

The Service Catalog is organized hierarchically. You can use the categories, subcategories, and items that are provided to structure the catalog. You also have the flexibility to modify, copy, and remove any of these to fit your needs. Any HP Service Manager business service owner and the service catalog manager in particular, can create or maintain a catalog using a simplified HP Service Manager interface and wizards to guide them in adding or changing service offerings. User can easily get products and services information from Service Catalog without needing to contact the service desk. Items in the Service Catalog can include an item picture, description, attachments, and purchasing options.

Types of catalog entries within categories and subcategories can include the following:

- A request for fulfillment activities without a related purchase of goods — for example: office move
- A purchase request with no related required fulfillment activities — for example: business cards
- A request for physical goods and associated fulfillment activities — for example: memory upgrade
- A bundle of multiple items, including multiple goods and fulfillment activities — for example: new employee setup
- Project or Request for Services — for example: application-hosting service

Request Matching

HP Service Manager can alert request fulfillment staff if an incoming request appears to be a duplicate of an existing request (same requester, same request type, same request timeframe, and so on).

HP Service Manager provides a smart indicator function, which provides information on related issues and gives users the ability to drill down to this data quickly to troubleshoot the issue. Smart indicators can be configured to show other interactions and incidents open and closed for the same user, incidents associated with the same service or incidents associated with the same configuration item (CI). Smart Indicators can also be configured to show known errors for a service, providing the ability to immediately communicate to the caller information related with the service.

As an example, after a user has submitted a service request, the request will be created first as an interaction. During this process, the smart indicator can be used to browse through other interactions while looking for associated service request with the same service recipient.

Meanwhile HP Service Manager provides other matching options. For example: In Incident Management Security Profile, customer can define how they want to check similar or duplicate Incidents. Then later if a user contacts service desk agent to report an Incident, agent can create a Service Desk interaction to collect information about the service request. Categorize the service request as an Incident, and then solve or escalate the request. When the service request results in an Incident system can automatically identify potentially matching Incidents.

Access and Control

User profiles control authorized users to create, modify, and close records. Request Fulfillment users are controlled by the Service Desk module self-service profiles for the requesting behaviors.

Also, service catalog configuration rights are controlled by capability words for accessing and edit control of Service Catalog records.

In this model, there is an “operator” control record for each user of the system. This record contains a column holding the specific “capability words” which allow or restrict functionality. The “service catalog” capability word allows or restricts request of catalog items. The “svcCatDeptRequester” and “svcCatEmployeeRequester” allow or restrict users from requesting items from the catalog for others. The “svcCatAdmin” capability word allows or restricts edit of the service Catalog items.

Fulfillment activities are controlled by the appropriate module where fulfillment will occur. The system provides options for Never, Always, and When Assigned. For example, one user may be able to create

and close records but only modify records assigned to them. Access to functionality within each module is governed by HP Service Manager security utilities, which define access based on role and user.

HP Service Manager also provides a security control to segment data between multiple customers. “Mandantan” controls identify which customer data a particular user or group can access, update, or both.

Access to Services

The Service Catalog only displays the items that the logged-in user is allowed to order, whether the user browses or searches the catalog.

Access to a service catalog item is defined in the catalog item itself. In the Access tab in the catalog item details, the catalog administrator can list the roles that are allowed to order the item. A business user will be able to see a catalog item in the catalog and request it only if he or she has been granted one of the roles listed.

In addition, access to a catalog item can be restricted using access filters. It is then possible to restrict a catalog item to a specific department, or a specific business unit. The access filters are also defined as part of the catalog item definition.

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