

Cherwell
GLOBAL
CONFERENCE
2016

**Innovation
with Purpose.**



Learn

Cherwell Portal and the Service Catalog

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Have you ever wondered.....

- How am I going to make it easy for my customers to find what they need in our service catalog?
- Can I make the classifications different in the Portal, but still map correctly in the technician client?
- Do I have to do only an A to Z Service Catalog in the Portal?

The Answer is.....You have a lot of options.

Let's explore one of the possibilities together.



Cherwell Technician Classification Structure

Service Request 102276
Service Cart Item #7041-1

Status **New**
Next: Begin Work

Priority **3**

Requestor: Alternate Contact Info
Andrew Simms
Andrew.Simms@RiverTCorp.com
(719) 386.7000

Owned By: Assign To...
- select owner -
1st Level Support

SLA: More Info...
Gold
(Customer SLA)
Respond By: 10/6/2016 12:00 PM
Resolve By: 10/7/2016 3:00 PM

I Want To:
[Take Ownership](#)
[Escalate to Level 2](#)
[View Detailed Date/Time Information](#)
[Link to Existing Major Incident](#)
[Submit to Knowledge Base](#)
[Track Time](#)

Record | Classify | **Fulfill** | Resolve | Close

Step 1: Record the Details Last Edited 10/6/2016 1:55 AM by Andrew Simms

Short Description: Cherwell Self Service
Call Source: Portal

Description: Change Password --(Submitted by Andrew Simms via Portal)

Step 2: Classify (clear classifications)

Service: Account Management [View Related KB Articles](#)
Priority: 3
Impact: Urgency:

Category: Cherwell Self Service
Subcategory: Change Password
Primary CI: [View CI Location on map](#)

Step 3: Fulfill the Service Request

Additional Details:



Default Service Catalog in the Portal

Service Catalog

[Account Management](#)

This service pertains to controlling access to network resources or centralized software. This can mean updating permissions, or creating new accounts.

Cherwell Self Service

[Change Password](#)

Network Access

[Change Password](#)

[New Account](#)

[Password Reset](#)

[Remove Access/Permissions](#)

[Conferencing/Presentation](#)

Conference Setup, Web sharing, projectors and more

Equipment Request

[Request Conference Phone](#)

[Request Projector](#)

[Request Webcam](#)

Video/Audio Conferencing

[One-Time Conference Setup](#)

[Request Account](#)

[Desktop Management](#)

[Employee Support](#)

This service is used primarily by HR and hiring managers to set up new employees, update their information, or request an employee separation task.

Add/Change

[BYOD](#)

[Employee Separation](#)

[New Employee Setup](#)

[Update Employee](#)

[Enterprise Apps](#)

This service contains options for mission-critical business software used by the organization.

Accounting System

[Request Access/Installation](#)

[Submit Incident](#)

CRM/Sales Software

[Request Access/Installation](#)

[Submit Incident](#)

JD Edwards

[Convert to Optio Form](#)

[Submit Incident](#)

Backup/Restore

[Request Full Restore of backup](#)

[Request new backup job](#)

[Request restore of files](#)

Fileserver

[Request File Share](#)

[Request increase in disk quota](#)

Physical Wires

[Request New Wiring](#)

[Request Relocation of Wiring](#)

[Submit Incident](#)

Wireless

[Request Access](#)

[Submit Incident](#)

[Printing](#)

This service covers local desktop and shared network printers. Users can request access to network resources, request toner/ink, or request a local printer of their own, pending approval.

Desktop

[Request desktop printer](#)

[Request Toner/Ink](#)

[Submit Incident](#)

Act
Go 1



Break Down the Service Catalog?

- Can we break the A to Z Service Catalog in smaller chunks or buckets?
 - Yes we can...it can be part of your portal design.
- Can we still have an A to Z Service Catalog?
 - Absolutely....in addition to the buckets
- Do the items (i.e. Service, Category, Subcategory) have to be the same in the Portal Action Catalog?
 - No! You can actually make them completely different and even group them differently?
- But won't that screw up how the Incident or Request comes in to the system?
 - Not at all. The Technician will see the proper classification and the data will be correct, but the customer will see something different in the portal.

How do we do this?



Presenting the Service Catalog in Chunks/Buckets

The screenshot displays the River T Corp service catalog interface. At the top left is the River T Corp logo. The top right shows a user profile for Andrew Simms. The main navigation bar includes links for Home, Service Catalog, My Devices, IT Calendar, Charts and Items, and Service Orders. Below this is a secondary navigation bar with My Requests (0), My Incidents (0), Notices (2), and Watched Issues (0). The central content area features a 'Welcome' message, a search bar for knowledge articles, and a service catalog with four categories: Access and Passwords (highlighted with a red arrow), Desktops and Laptops, Software, and Mobile Devices. The bottom section contains four columns of links: Manage Devices (View My Devices, Request a New Device), Help (View Knowledge Articles, View FAQs, View IT Calendar), Incidents & Requests (Report an Issue, View My Incidents and Requests, Browse Service Catalog), and News & Alerts (Latest News, Top Issues, Known Errors). The footer includes contact information for River T Corp: Phone: 1-800-555-1234, Support Hours: M-F 8:00 am - 5:00 pm MST.



“Chunked Out” Action Catalog

The screenshot shows the RiverT Corp Service Catalog interface. At the top left is the RiverT Corp logo. The top right shows a user profile for Andrew Simms. The navigation bar includes links for Home, Service Catalog, My Devices, IT Calendar, Charts and Items, and Service Orders. A search bar is located on the right side of the navigation bar. Below the navigation bar is a large banner image of a highway interchange at night. The main content area is titled "Service Catalog - A" and contains a section for "Access and Passwords". Under this section, there are two main categories: "Cherwell Portal" and "Network Access". The "Cherwell Portal" category has a link "My password needs to be changed" which is highlighted with a red arrow. The "Network Access" category has two links: "I need help changing my password" and "My password doesn't work".



What the Customer Sees

River T CORP

Sites Andrew Simms

Home Service Catalog My Devices IT Calendar Charts and Items Service Orders

Quick Search Go

Save Abandon Lookup (0) Record 1 of 1

My password needs to be changed

Please fill out the following information:

Detailed Description:

Add to Cart



What the Technician Sees

Service Request 102276
Service Cart Item #7041-1

Status: **New**
[Next: Begin Work](#)

Priority: **3**

Requestor: [Alternate Contact Info](#)

 Andrew Simms
Andrew.Simms@RiverITCorp.com
(719) 386.7000

Owned By: [Assign To...](#)

 - select owner -
1st Level Support

SLA: [More Info...](#)

 **Gold**
(Customer SLA)
Respond By: 10/6/2016 12:00 PM
Resolve By: 10/7/2016 3:00 PM

I Want To:

- [Take Ownership](#)
- [Escalate to Level 2](#)
- [View Detailed Date/Time Information](#)
- [Link to Existing Major Incident](#)
- [Submit to Knowledge Base](#)
- [Track Time](#)

Record Classify **Fulfill** Resolve Close

Step 1: Record the Details

Last Edited 10/6/2016 1:55 AM by Andrew Simms

Short Description:

Cherwell Self Service

Call Source:

Portal

Description:

Change Password --(Submitted by Andrew Simms via Portal)

Step 2: Classify

[\(clear classifications\)](#)

Service:

Account Management



[View Related KB Articles](#)

Priority:

3

Impact:
Urgency:

Category:

Cherwell Self Service



Primary CI:



Subcategory:

Change Password



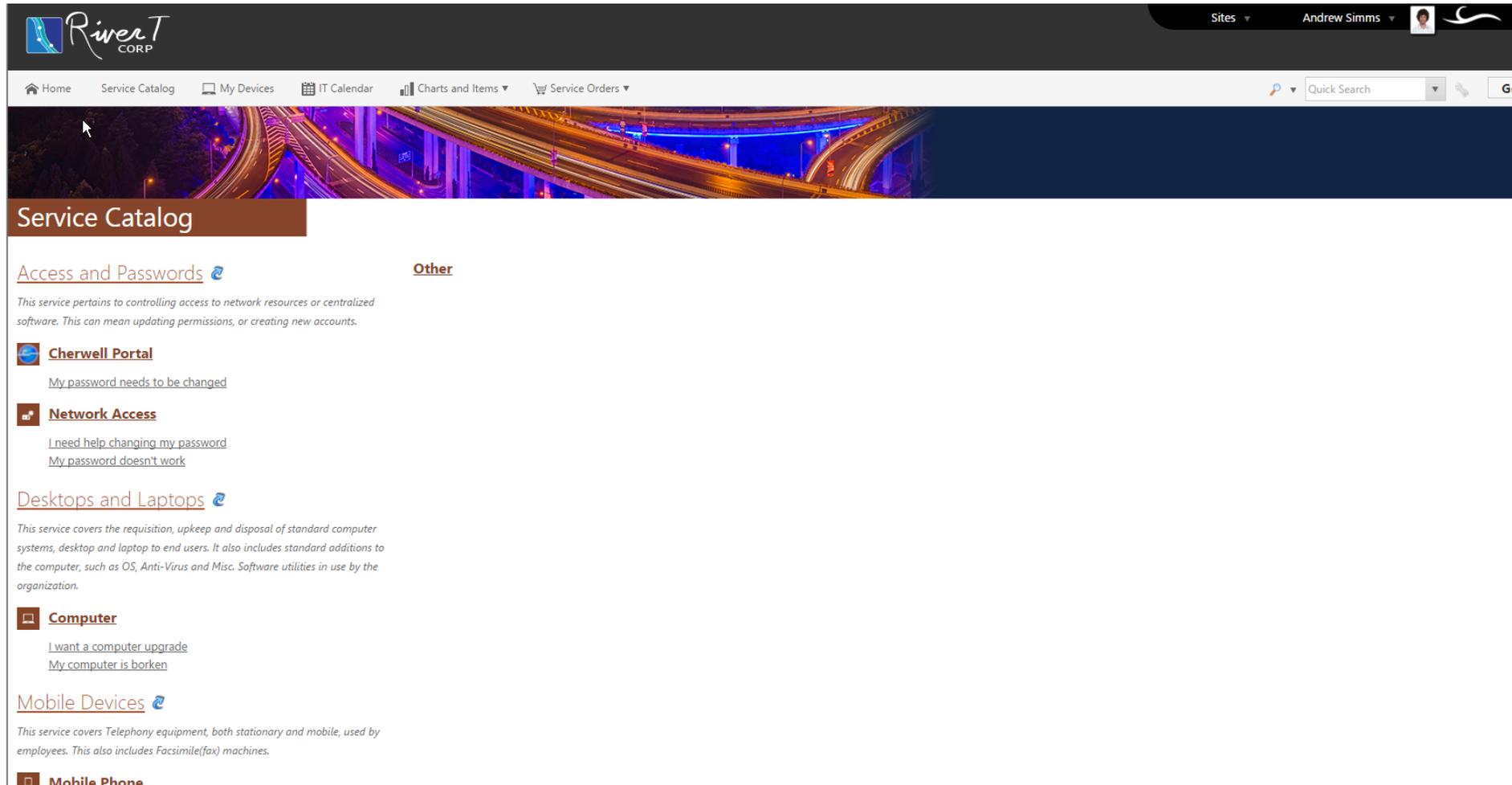
[View CI Location on map](#)

Step 3: Fulfill the Service Request

Additional Details:



A-Z Service Catalog Still Works



River 1 CORP Sites Andrew Simms

Home Service Catalog My Devices IT Calendar Charts and Items Service Orders Quick Search Go

Service Catalog

Access and Passwords

This service pertains to controlling access to network resources or centralized software. This can mean updating permissions, or creating new accounts.

Cherwell Portal
My password needs to be changed

Network Access
I need help changing my password
My password doesn't work

Desktops and Laptops

This service covers the requisition, upkeep and disposal of standard computer systems, desktop and laptop to end users. It also includes standard additions to the computer, such as OS, Anti-Virus and Misc. Software utilities in use by the organization.

Computer
I want a computer upgrade
My computer is broken

Mobile Devices

This service covers Telephony equipment, both stationary and mobile, used by employees. This also includes Facsimile(fax) machines.

Mobile Phone

Other



How Did We Do That?

- Changes to the Service, Category and Subcategory Tables
 - Add Portal Lookup Fields
- Adjust Action Catalogs to look at the new values
- Create Unique Action Catalogs for each of our “buckets”
- Added these values to be auto populated when the action is run
- Adjust Incident Portal View to Display these New Values

Let's take a look



Adapt Service Object

Service

Status: **Active**
Next: Retire

Breached Incidents: **0**

Open Incidents: **1**

Owned By: [Assign To...](#)

 **Gina Mehra**
IT Management
833-898-7381
gina.mehra@RiverTCorp.com

I Want To:

- [Take Ownership](#)
- [View Detailed Date/Time Information](#)
- [Visualize](#)
- [Submit for review](#)

Planning | Approval | Development | **Active** | Retired

[Details](#)
[Alignment and Cost](#)

Details

Service Name: Account Management

Service Type:

Service Classification:

Service Manager (Owned By): Gina Mehra

Importance: Support Visible in Customer Portal

Optional Services:

Services Excluded:

SLAs Entitled to this Service: Platinum, Gold, Silver, Corporate
(comma (,) separated list)

Portal Service Name: Access and Passwords

Portal Service Description: This is where we can change access and passwords

Service Description: This service pertains to controlling access to network resources or centralized software. This can mean updating permissions, or creating new accounts.

Services Included:

Linked Services | Categories | Subcategories | Incidents | Problems | Change Requests | Configuration Items | Service Schedules | SLA

No records

Service Name	Service Description	Importance	Operating Hours	Service Avail
--------------	---------------------	------------	-----------------	---------------



Adapt Incident Category Object

Category

Service:
Account Management

Incident Category:
Cherwell Self Service

Specifics Name:

Visible In Portal

Image:
 Choose Image
(72x72px recommended)

Portal Service:
Access and Passwords

Portal Category:
Cherwell Portal



Adapt Incident Subcategory Object

Subcategory

Service: ▼

Incident Type: Incident Service Request

Category: ▼

Subcategory:

Specifics Name: ▼

Service Catalog Action to Run

Portal Service: ▼

Portal Category: ▼

Portal Subcategory:

Default Team: ▼

Level 2 Escalation Team: ▼

Level 3 Escalation Team: ▼

Note: The Level 3 team defaults to the Service's OLA team.

Visible in Customer Portal



Adjust Action Catalog Display Settings

Widget

Name: Type:

General

Actions

Display

Groups

Display Options

Decide how actions are displayed

Style:

Fields Holding Display Text

Title text:

Descriptive text:

Show Image next to each command

Field with image:

Expression:

Use an expression to enable/disable actions

Expression:

Action Catalog - Incident SubCategory Group

Fields from the Incident Category validation object are used to display the items in the Incident SubCategory group

Fields from Incident Category

Name:

Description:

Order by:

Show image next to each item

Field with image:

Expression:

Expressions

Show/hide items:

Enable/disable items:

Allow Drill Down

User must drill-down to see items in this group

All group items will be shown even if not drilled-down

Max items to show without drilling-down:

Drill-down style:

Allow quick view of Incident Category in a popup window

OK Cancel



Create Custom Action Catalogs for the “Buckets”

- Expiring Agreement
- Grade Score Vs. Risk Score
- Impact Events
- Incidents by CI
- Incidents vs Baseline
- Join Table SCT to WU
- Lead scores
- Open Incidents for My Department - Collaboration
- Score
- Score vs. Avg. Supplier Score
- Service Catalog
- Service Catalog - Access and Passwords
- Service Catalog - Collaboration

The screenshot displays the 'Widget' configuration window. The 'Name' field is set to 'Service Catalog - Access and Passwords' and the 'Type' is 'Action Catalog'. Under the 'Actions To Execute' section, the 'Action business object' is 'Incident SubCategory'. The 'Limit action records using query' checkbox is checked, with a 'Custom query' field. A 'Custom Query' dialog box is open, showing a query: 'Incident SubCategories where all of the following are true: Incident SubCategory.Visible In Portal equals True and Incident SubCategory.Portal Service equals Access and Passwords'. The dialog also includes options for 'Sort results by' (Subcategory), 'Grouping clause', and radio buttons for 'All of the items in the group must be true' (selected) and 'At least one of the items in the group must be true'. 'OK' and 'Cancel' buttons are visible at the bottom of the dialog.



Auto populate Values

Cherwell Service Management Administrator - New Blueprint * (licensed to Excalibur Data Systems) - Cherwell Browser connection, Demo2 database

File View Edit Managers Tools Business Object Help

Object Manager
 Save Blueprint to disk
 Scan Blueprint
 View scan results
 Publish Blueprint
 Close Blueprint

Common tasks
 New Business Object
 Expressions manager

Business Object
 Incident properties
 Incident actions
 Delete Incident bus object
 Add field

Help
 Blueprint help

Edit Incident Business Object

Business Object: Incident [Bus Ob Properties...]

Description:

Name	Type	Size	Details
Owned By Workgroup	Text	30	
Owned By Workgroup ID	Text	42	
Owned By Manager	Text	50	Category=Common, Auto-filled
Owned By Manager Email	Text	50	Category=Common, Auto-filled
Owner ID	Text	42	Category=System, Default: CurrentUserRecordID(), Auto-filled
Owner Team ID	Text	42	Category=System, Default: CurrentUserDefaultTeamID(), Auto-filled
Parent Ticket	Logical	n/a	Category=System
Pending End Date Time	Date/Time	Date and Time	Category=Status
Pending Previous Status	Text	35	Category=Status
Pending Reason	Text	30	Category=Status, Conditionally Required, Validated from Incident Pending Reason.Pending Reason
Pending Start Date Time	Date/Time	Date and Time	Category=Status
phase Approvals Status	Text	15	Category=Status, Default: Not Required, Validated from Incident Phase Status Status
phase Classify Status	Text	15	Category=Status, Default: Required, Calculated, Validated from Incident Phase Status Status
phase Close Status	Text	15	Category=Status, Default: Required, Calculated, Validated from Incident Phase Status Status
phase Investigate Status	Text	15	Category=Status, Default: Required, Calculated, Validated from Incident Phase Status Status
phase Record Status	Text	15	Category=Status, Default: In Progress, Calculated, Validated from Incident Phase Status Status
phase Resolve Status	Text	15	Category=Status, Default: Required, Calculated, Validated from Incident Phase Status Status
phase RFW Status	Text	15	Category=Status, Default: Not Required, Validated from Incident Phase Status Status
phase Set Order	Number	Whole: 3 Decimal: 1	Category=Status, Calculated
Portal Category	Text	50	Validated from Incident.Category.Portal Category, Auto-filled
Portal Service	Text	50	Validated from Service.Portal Service Name, Auto-filled
Portal Subcategory	Text	50	Validated from Incident.SubCategory.Portal Subcategory, Auto-filled
Portal Wizard Counter	Number	Whole: 2 Decimal: 0	Default: 1
Portal Alt Contact Info	Text	100	Category=Common
Portal Multiple Users	Text	5	Category=Common, Validated
Portal Request Description	Logical	n/a	Category=Common, Calculated
Portal Required Incident Fields	Logical	n/a	Calculated
Portal Urgency Fields	Logical	n/a	Category=Common, Calculated
Portal Urgent	Text	5	Category=Common, Validated
Priority	Text	15	Conditionally Required, Calculated
Project Code	Text	10	Category=Deprecated
Reason for Breach	Text	50	Category=SLA, Validated from Incident Breach Reason.Reason for Breach
RecID	Text	42	Category=System, Default: NewID()
Recurring Incident	Logical	n/a	
Requester Department	Text	50	Category=System, Auto-filled
Review By Deadline	Date/Time	Date	Category=Status, Conditionally Required
SCT Fired	Logical	n/a	
SCT RecID	Text	42	Category=Service Cart, Auto-filled
Selected Status	Text	30	Category=Status, Validated from Incident Status Status
Self Service Contact Info Connect	Logical	n/a	Category=Deprecated

Field: ApprovalBlockID [Field Properties...]

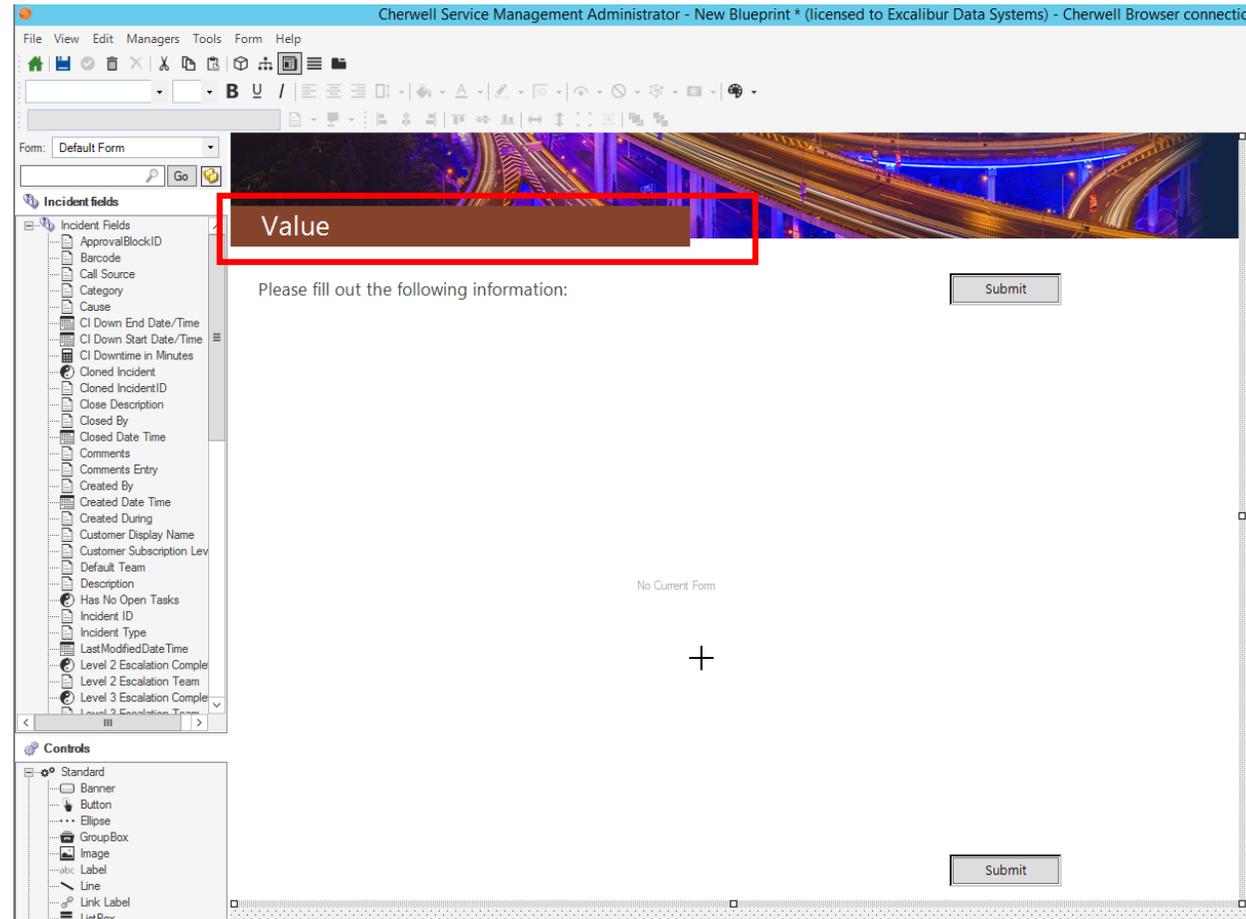
Description:

Activate Windows
 Go to System in Control Panel to activate Windows.

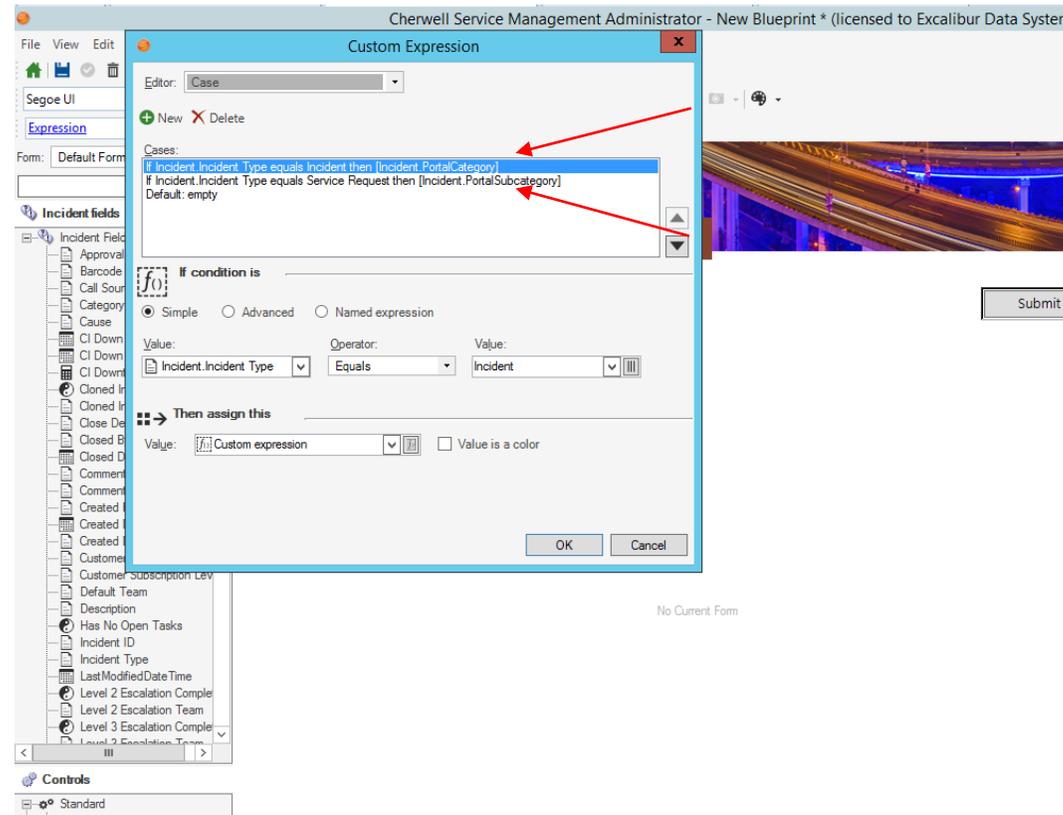
7:50 AM



Adjust Portal Forms



Adjust Portal Forms



What We Are NOT Changing

- What we didn't change was the action catalog One Step to create the Incident. It is still:
 - Populating Service, Category and Subcategory (We simply auto populated our Portal Values)
 - It still is following any routing or other rules you have set (via the One Step or Auto Populate)



Another Example

Portal Home

Tuesday, October 4, 2016

0 My Open Incidents

0 My Open Requests

0 Updated Today

0 My Closed Tickets
(this week)

My updated Tickets in the last month

Search Knowledge Articles

Browse Services below to log a Ticket

Access

Enterprise Applications

Infrastructure

Cherwell Platform

News for Major Incidents

No records found

News for Problems

No records found



Activate Windows
Go to System in Control Panel to activate Windows.



Another Example

The screenshot shows a web application interface for an Access Service Catalog. At the top right, there is a navigation bar with 'Sites', 'Michael Fuson', and a user profile icon. Below this is a main navigation bar with links for 'Home', 'Service Catalog', 'My Items', 'Department Items', 'Searches', and 'Reports'. A search bar with the text 'Quick Search' and a 'Go' button is also present. The main content area is titled 'Access Service Catalog' and includes a globe icon and the text: 'This is the Access Service Catalog. Hover over any tiled item to see what actions are available.' Underneath, there is a section labeled 'Access' containing two blue tiles: 'Call Center' and 'Employee Onboarding'. A red rectangular box highlights the entire content area from the title to the tiles.



Things to Consider for the Portal

- Keeping the design clean, clean lines, flow, balance
- How are we drilling down?
 - To a new dashboard (like the first design) or directly to the action catalog (like second design)
- What information does the customer really need?
- Do we want to drill down to other pages? Are there restrictions? Do we have the data to understand those restrictions?



Final Thoughts

- Providing a Service Catalog in the Customer's Language can be done, and it's pretty easy.....
- Because we are leveraging what is already there, we are getting the right data, routing and any other goodness you have added, but we have made it easy for the customer to find what they need and thereby tell us how we can help.
- The Customer Portal can be a great resource. Consider your options, consider your audience. If you build it well they will come.....





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