Cisco Prime Service Catalog 12.0 User Guide

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Using Service Catalog

Cisco Prime Service Catalog software is a self-service portal for you to order and manage any type of IT services, from the data center to desktop. You can also order infrastructure as a service such as virtual machines, fenced containers, and VACS (if UCSD is integrated), and use service catalog for lifecycle management of these entities. For details on how to place and manage these orders, see Placing Order for Services and Managing Orders.

Using Service Catalog is much like shopping on a typical web site where you browse through a catalog, add items to your shopping cart, and then check out.

In Service Catalog, your shopping cart is referred to as a requisition or order. When you submit a requisition, Service Catalog provides you with a requisition number you can use to track the progress and status of your order.

For the most part, what happens to your requisition after you submit it is transparent to you. For example, your requisition may require several levels of approval. But from your perspective, there is nothing more you need to do.

Within Service Catalog, you can:

- Navigate through a catalog of services. See Browsing Services

- Order a service for yourself. See Ordering Services.

- Order a service on behalf of someone else. See Ordering For Others.

- Track your requisitions. See Tracking Order.

- Cancel a requisition or a service. See Cancelling an Order.

- View Service Items and associated services. See Viewing My Products & Services.

- Update your Profile information. See Setting Up Your Profile.

You can also perform these operations from the Service Catalog module. By default, Service Catalog module is enabled as the home module for end users, from Administration > Setting > Service Catalog module. For more information on how to use Service Catalog module, see Placing Order for Services.

Introducing Service Catalog

The Service Catalog module is an end-user module that provides users with a shopping cart experience similar to an e-Commerce website. This module can be enabled to replace the My Services module. For more information about replacing the My Services module with Service Catalog, see the Common Settings table in Prime Service Catalog 12.0 Administration and Operation Guide. When you enable Service Catalog, My Services is replaced by Order Management, Service Catalog, and My Products & Services modules.

> **Note** If you have upgraded to Cisco Prime Service Catalog11.0, you will find Service Catalog replaces My Services.

To enable Service Catalog:

You can choose to enable the Service Catalog module by changing the Settings on the Administration module. When you enable the Service Catalog module and login in again, My Services module is disabled. However the following modules are enabled:

- Service Catalog: The Service Catalog module provides a shopping cart experience to a user. The user can navigate through Service Items and Order On Behalf in this module.

- Order Management: Order Management module enables the remaining features of My Services module such as Requisitions, Copy Requisitions, and Authorizations.

To configure the Service Catalog home page:

If you are logging in to the Service Catalog Module for the first time, you may see an empty home page with just the **Manage Your Stuff** tab in the heros band, unless the home page is configured in the Service Designer module. Most customers may see the Order On Behalf content starting with the virtual appliance. A service designer designs the home page that includes the display of categories and their hierarchy, search options, and so on.

The attributes that you configure in the **Service Designer > Extensions** component is automatically displayed in the Extensions tab of the Services component for all services. You can further define values for each extension and then save the configuration. For more information, see Cisco Prime Service Catalog Designer Guide.

Service Catalog page may allow you to order a service for another user, if the admin has given you the permission. For more information on how to order for others, see Ordering For Others.

Logging On

If you do not see the login page while logging in, that implies that the administrator might have set up single sign-on and have given you direct access to the service catalog, once you have logged into the corporate SSO server.

Note Cookies must be enabled on your web browser in order to use this product.

To log on to Service Catalog:

Step 1 On the Login page, enter your **User Name** and **Password**.

Note If single sign on is enabled, you will see the corporate login page. Login using their credentials and then you will be automatically signed in to Prime Service Catalog.

Step 2 Click **Login**. Your default login module displays.

Step 3 If Service Catalog is not your default module, choose **Service Catalog** from the Module drop-down menu.

Note You can change your default login module when you set up your profile. For more information on setting up your profile, see Setting Up Your Profile.

Updating Passwords

On the login page, you have two options to update your password - the Change Password, and Forgot Password options. The new password is effective from the subsequent login onwards. If you forget the password, click **Forgot Password** and the change password link is sent to your registered email id. You can create your own password or automatically generate password using the **Generate Password option**.

Note If you are unable to reset your password, contact your system administrator.

To reset your password on the application login page

Step 1 Click **Change Password**.

Step 2 Enter your current password in the **Current Password** text box.

Step 3 Click **Generate Password** to create a system generated password. The **New password** and **Confirm password** fields are automatically populated with the new credentials.

Step 4 Alternatively, enter a new password in the **New Password** text box that adheres to the password policies.

Step 5 Reenter the new password in **Confirm Password** text box.

Step 6 Click **Save**.

Make a note of the username and password that you create. You will need these to log in.

Setting Up Your Profile

Your user profile contains your user information, preferences, calendar information, and access privileges across the application. You can change your user profile at any time.

To create or change your profile:

1 On the settings drop-down menu, click **Profile**.

2 Click Setting Up Your Information, Setting Up Your Profile, or Setting Up Your Preferences to create or change those settings, and Click Setting Up Your Profile to view the privileges or capabilities that you have access to across the application.

3 Click **Update** within each individual section to save your settings for that section.

You must provide information for every field marked as required (*).

Setting Up Your Information

Your user information is used by the system, and by the service performers who provide services to you, to ensure that you receive requested services as efficiently as possible.

In particular:

- You can create your own password or opt for a system generated password:-

  ◦ Click **Generate Password** to create a system generated password. The **New password** and **Confirm password** fields are automatically populated with the new credentials.

  ◦ Create your own password; enter a password in both the **New Password** and **Confirm Password** text boxes.

Note If you change your password, you are automatically logged out from the system. A popup window appears, prompting you to log in using the new password.

Make a note of the username and password that you create. You will need these to log in.

- Enter your credentials against first name and last name.

- Enter your preferred time zone.

- Information such as work phone, work fax, personal address, city, country, building or cubicle are optional and provides detailed description for a user.

Setting Up Your Preferred Language

By default, only US English is available in the Preferred Language drop-down list. Other languages can be made available by adding them to the Language List in the Administration module. See the Cisco Prime Service Catalog 12.0 Designer Guide for more information. In Prime Service Catalog 12.0, the admin can enter translations and enable additional languages for end users.

The supported languages for all the modules are as follows:

- German

- French

- Spanish

- Dutch

- Chinese (Simplified)

- Chinese (Traditional)

- Brazilian-Portuguese

- Japanese

- Korean

Setting Up Your Calendar

Your calendar settings establish your availability. You can:

- Set your work hours and work days.

- Set the holidays on which you are not available.

While entering calendar information, the following applies:

- Under Working Hours, change your standard working hours and days by entering new times in military time format in the From and To fields. For example, you would enter 23:00 for 11:00 p.m.

- Type 00:00 in the From and To fields for days that you do not work.

- Under Add New Calendar Entry, you can change a Working Day to a Holiday.

- Change the status of a day from Holiday back to Working Day.

Setting Up Your Preferences

Your preferences include settings for:

- Various date formats.

- Your Default Login Module - Service Catalog users who order services on behalf of others or use reporting can set Service Catalog to automatically log into those views. Users of other modules can elect to automatically log in to the module they use most frequently.

- Your Default Service Manager view - Service performers can set the system to automatically go to the Service Manager view they use most frequently.

- Your Default Service Manager Status search filter setting - Service Manager offers a status filter that narrows all search results in Service Manager to the tasks or requisitions that match the chosen status filter. The system-wide default setting is **All Ongoing** tasks. You can choose a different setting for yourself here. Be cautious about choosing another setting, such as **All Tasks**, may impact performance.

- Time Format- Choose your preferred time format.

- View Authorization Portlet- Service Catalog users can select this option to view authorization portlet from order management.

• View My Service Items Portlet- Service Catalog users can select this option to view My Service Items portlet from order management.

• Use Service Catalog- Select this option to enable the Service Catalog module.

• Authorizations Delegate information - Click **Select Person** and choose a person to perform authorizations for you. You must specify the time period during which the selected person can authorize on your behalf, using the **Delegation Start Date** and **Delegation End Date** fields. The site administrator can also set up a delegate for you using the Permissions tab of the Organization Designer People option.

Viewing your Privileges

The **Privileges** option displays the currently granted privileges for your user account.

Note   You cannot modify the privileges assigned to you.

Only site administrators have access to all the roles and the privileges. For more information on the roles and privileges that a user can have, see *Roles* section of Cisco Prime Service Catalog 12.0 Administration and Operations Guide.

Rating and Review

• Users who have purchased services can rate and post feedback for the services on My Products & Services, and also edit the submitted feedbacks.

Note   A user can rate the purchased service only once.

• All users can:

   ◦ View ratings and reviews for a service in the Offer Details page. The ratings are based on the average of all ratings submitted for a service.

   ◦ Filter services based on ratings.

• An inactive and non-orderable service cannot be rated.

Note   Only users with a site administrator role can delete the submitted feedbacks.

Using the Dashboard

When you log into Prime Service Catalog, it displays the Summary of the Cloud applications and resources on the dashboard. Dashboards display at-a-glance information about the most important data in your cloud network— status and alerts, performance and reporting information. A quick scan of a dashboard lets you know if anything needs attention.

Dashlets are the sub-areas that provide metrics using graphs and text. Prime Service Catalog provides a variety of dashlets that can provide you with information about active deployments, active servers, hours of use, cost, recent orders, and performance reports.

Note The dashlets Active Deployments, Active servers, Total Cost, and Total hours are hidden for the Site Admin and Service Admin.

- Active deployments—Displays the number of active CloudCenter application deployments.
- Active servers—Displays the number of active UCS director servers.
- Total hours—Displays the total hours of usage.
- Total cost—Displays the total purchase cost.
- Alerts—Displays the notification like pending authorizations.
- Recent orders—Displays the recent history of the open orders.
- Performance—Displays the performance of the storage, CPU, and usage of the server in graphical representation.

Prime Service Catalog Main Menu

The main menu is available on the service catalog module which allows you to navigate to other areas and modules within Prime Service Catalog GUI. Click the icon at the top-right corner to view options to order services, view the team information and pending approvals, and perform actions on the deployed applications, servers and VDCs, generate reports and view order history. You can also navigate to other modules from the Advanced Configurations tab.

Click the + plus icon to expand **My Products & Services** menu that contains the following options:

- **Dashboard**—Navigates you to the dashboard of Service Catalog.
- **Deployments**—Navigates you to active deployments page, where you can see the active CloudCenter deployments. You can deploy a new CloudCenter service by clicking **New Deployment**. Only those applications for which you have permissions to deploy are displayed in the Deployments page.
- **Servers**—Navigates you to the active UCSD server page, where you can see the active UCS director servers. Click **New Server** to add a new server from this page. For more information see Ordering the Infrastructure as a Service.
- **Reports**—Navigates you to the performance page, where you can monitor the reports of the server storage, server CPU, and usage in a graphical representation.
- **Orders**—Navigates you to the order history page, where you can see all the orders placed in the service catalog.

Terms and Definitions

The table below table lists and defines the key terms used in this document.

Term	Definition
Customer	Person receiving a service. You can be the customer of services you order for yourself, and for services that others order for you.
Initiator	Person who places the order for a service. You are the initiator of orders you place for yourself, and orders you place for others.
Expected Duration	Duration of time within which a task should be completed.
Standard Duration	Duration of time, usually in business days, within which the service team has committed to deliver this service after any required authorizations have been completed.
Performer	An individual or user or queue assigned to complete the task.
Service Group	A folder containing similar services, grouped to facilitate and organize the service design process. Service Groups are not visible to customers.
Available Work	The area in Service Manager where a Service Team member can access tasks that have been assigned to a Queue. (The team member must have been assigned rights to draw work from that Queue.)
My Work	The area in Prime Service Catalog where service team members access all tasks assigned to them.
My Late Work	A Service Manager view that displays Ongoing tasks assigned to you that have not been completed by the due date.
Work Forecasts	A Service Manager view that displays new tasks assigned to you. These tasks have not yet started-they are not yet Ongoing.
Personalized View	Collection of search filters and other settings you choose using filter and search, and then save to be reused any time you return to Service Manager.
Task	An activity performed to support the delivery of a service.
Requisition	A template for service orders. A person submitting a requisition can request multiple services at the same time, such as a new computer, a software upgrade, and access to the company's financial software-or just a single service. A requisition is usually generated from Service Catalog or My Services module.
Historical Requisition	This requisition provides overall application performance improvement as a result of reducing the amount of data in the current transaction tables. It is controlled by the system setting 'Enable Historical Requisitions Scheduler' in the Administration module. When it is enabled, requisitions that have been completed for more than 365 days are migrated by a background process to the historical transaction tables.
Unsubmitted Requisition	Requisition that is still in preparation. You can add or delete services, edit service order forms, or entirely cancel an unsubmitted requisition.
Authorization	Process performed by a designated individual of evaluating, and then approving or rejecting a service request. Lack of authorization stops the service delivery process.

Term	Definition
Permissions	Rights (as assigned) at the site and organizational unit level to perform **Request Center** tasks. Rights can be assigned to people, functional positions, or organizational Units to edit data and perform various functions in Prime Service Catalog. For example, a user could have permission to access Service Manager and Service Catalog, but might not have permission to access Service Designer and Organization Designer.
Service Manager	A Prime Service Catalog module which is used by the service teams to find and manage their Service Catalog tasks.
Review	Process of making sure that a request for service or product is feasible. Normally, a service team member or manager completes reviews.
Delivery Plan	The workflow process established by Prime Service Catalog administrators to complete a service order after it has passed through the authorization and/or review stages.
Standard Duration	Amount of time, usually in business days, within which the service team has committed to deliver this service after any required authorizations have been completed.
Business Unit	Group in your organization, such as a department. Business Units are one type of Organizational Unit (OU) in Prime Service Catalog.
Service Order	Request for a service, supply, or equipment.

Placing Order for Services

Placing an order involves the following tasks:

- Browsing Services
- Searching for Services
- Viewing Service Details
- Ordering Services
- Confirming your Order

Browsing Services

The first step in the service order process is to locate the particular service you need. Services are grouped into categories. Browsing through these categories is one way of locating services. You could also search for services. See Searching for Services.
The Browse Services page appears when you click a service category in Service Catalog module, and it displays the subcategories and services within that category.

To browse services:

Step 1 On your Service Catalog home page, select a category name or its icon from the Browse Categories drop-down.

Service Catalog displays the subcategories and services in that category in the Browse Services page.

Step 2 If there are additional subcategories within a category, continue to click through each subcategory until you locate the service you want.

Step 3 When you have located the service you want:

- Click the name of the service to view a complete description of the service.

  OR

- Click **Order** to fill in the order form and add the service to My Cart.

Searching for Services

The first step in the service order process is to locate the particular service you need. You search for a service that you wish to order using Service Catalog.

To search for services:

Step 1 On the Service Catalog page, click the **search** icon and enter a word or phrase into the search box and press **Enter**. You can also do a wildcard search with an asterisk (*) as shown in the table below.

Valid Wildcard (*) Search Criteria	Search Results
the wildcard (the * symbol) used alone	All services in the system. You must enter the wildcard alone to see all possible selections. (The full list of options does not necessarily appear by default).
* before service or * after service (with no spaces; for example, *service, or service*)	All services with something either in front of the service name or after the service name that match the search entry.
* before and after service (with no spaces; for example, *service*)	All services that have something in front of the service name and after the service name that match the search entry.

Note Do not use quotation marks ("") around search phrases in the search box.

Step 2 Press **Enter**. Service Catalog displays an alphabetical list of services that match your search criteria.

Step 3 When you have located the service you want:

- Click the name of the service to view a complete description of the service.

  OR

- Click **Order** to fill in the order form and add the service to My Cart.

Viewing Service Details

The service details page displays all the information you need about a service to help you determine its appropriateness for your particular requirements.

To view the service details page of a service, click the *service name* link for a service. The service details page displays the Service Overview, on page 11.

After you review the service details, you can:

- Click **Order** to add the service to your cart.

  OR

- Click **Back** to return to browsing or searching for the service you need.

> **Note** If you view the details of an included service that is part of a bundle, you cannot individually order the included service. The Order button does not appear. Instead, click **Return to Service Bundle** to view detailed information for the parent service.

Service Overview

The service overview provides a description of the service, along with summary information about pricing and service delivery.

Table 1: Service Overview

Standard Duration	Duration of time, usually in business days, within which the service team has committed to deliver this service, after any required authorizations have been completed.
Service Level Description	Description of the service.
Price	Price, if any, for this service.
Price Type	Type of pricing-such as Fixed pricing or Time & Materials-for this service.
Price Description	Brief description or explanation of the pricing for the service.

Ordering Services

Once you have located the service you want to order:

1 Click **Order**.

The next step in the service order process is to complete the order form.

2 Complete the Order Form.

Mandatory fields on the Order Form are indicated by a red asterisk (*).

The information that you provide in the order form is used by reviewers, authorizers, and service performers during the services delivery process. It is important that you provide complete and accurate information. Whenever possible, Service Catalog will prefill information about you from your profile. For more information on setting up your profile, see Setting Up Your Profile.

3   Once you complete the order form, click **Add to Cart**.

4   You can order the service immediately, or you can add multiple services to an order.

- If you are only ordering one service, click **Place Order** in the My Cart page to order the service immediately and conclude the order process.

- You can add additional services to the requisition now, or at a later time, and then place order when you have added all the services you need. To track your ordered service, see Tracking Order.

Ordering the Infrastructure as a Service

Using the Prime Service Catalog web interface, you can order VMs and infrastructure resources in private and hybrid cloud after integrating with UCS Director. You can also order Cisco Virtual Application Container Services (VACS) to automate the provisioning of virtual private data centers and deploy applications faster with compliant, highly secure containers.

Depending on the type of infrastructure resources ordered, Prime Service Catalog routes the provisioning of these entities to UCSD or VACS, for example: the private VM operations are routed to UCS Director.

Order these services from **My Products & Services**. Go to **Server > New Server**. Only order those VMs and infrastructure services for which you have been granted permission to order, is available on this page. The types of infrastructure services available are:

- Container templates, container catalogs, standard catalogs, and advance catalogs from UCSD

- Container catalog services and container template services from VACS.

   VACS template services includes a CSR Virtual Machine, VSG Virtual Machine, and application Virtual Machines.

Prime Service Catalog creates service item entries for each of these imported entities from VACS and UCSD. When the provisioning is completed, Prime Service Catalog updates the attributes for these entities and their statuses in the **My Products & Services > Service Items** page. After these entities are available in the **My Products & Services** page, you can perform lifecycle operations on these entities from this page. All the active virtual machines from VACS and UCSD can also be managed in **My Products & Services > My Servers** page. For more details on these lifecycle operations, see Post-Provisioning Operations of UCS Director and on managing active servers, see Managing Servers. After these services are ordered, you can track the status of provisioning and also the status of the post-provisioning operations for these entities in **My Products & Services > Orders > Order History** page.

Synchronizing UCS Director Details

Prime Service Catalog provides the following capabilities for the UCSD entities:

- Refresh Functionality in IaaS

- Synchronizing Virtual Machine Details for an Advance Catalog

- Overwriting Quota information of a Tenant

- Restoring VDC and UCSD Container Details

- Sync Tenant Information from UCS Director

Refresh Functionality in IaaS

When the tenant, VDC, virtual machine, or load balancer creation process fails on the UCS Director, you can request for the latest data from the UCS Director using the refresh functionality.

New Refresh Functionalities	Prime Service Catalog Web Interface Pages	Synchronizes
Tenant Refresh	**Tenant Management > Tenant Dashboard**	Status
VDC Refresh	**Service Catalog > My Products & Services > Virtual Data Centers**	Status and Entities like VMs, Load Balancer
VM Refresh	• **Service Catalog > My Products & Services > My servers** • **Service Catalog > My Products & Services > Virtual Data Centers**	Status
Load Balancer Service Refresh	**Service Catalog > My Products & Services > Virtual Data Centers** 1 Select a VDC. 2 Click **Load Balancing** tab.	Status

If the Prime Service Catalog request fails on the UCSD, the **Refresh** icon gets enabled on the above pages. After the refresh, the current status from UCSD is reflected in Prime Service Catalog.

> **Note** APIC-Container VM refresh is possible only when a VM is in FAILED status. Refresh request fails with an error message "Refresh Failed:VM needs to be in Failed Status" when any one of the VM in a container is in any other status such as: Inactive, Being Provisioned, Being Deleted etc.

For more information on creating Tenants, see Creating Organizations and Users.

For more information on creating VDCs, see Adding Virtual Data Center.

For more information on VACS virtual machines, see Managing Virtual Data Center.

Synchronizing Virtual Machine Details for an Advance Catalog

As a service designer, you can attach a sych task plugin workflow type to an Advance Catalog Service to synchronize virtual machine detail from UCSD. This workflow type can be used if an Advance Catalog is used to provision a virtual machine.

To attach a Synch Task (Java Plugin)

1 Navigate to **Service Designer** > **UCSD Services** > **{VM Provision with Single SR} service** > **Plan** .

2 Under the **Task** area, select the **Sync Workflow** tab.

3 Choose the **Workflow Type** as **Sync Task (Java Plugin)**.

4 Modify the following Sync Task parameters for the Advance Catalog:

- Sync Task Plugin Class: com.celosis.event.SyncTaskUCSDContainerPlugin

- Param1: UCSD_AdvancedInformation.SR_ID

- Param2: CreateStandardVM

- Param3: UCSD_AdvancedInformation.Status

- Param4: UCSD_AdvancedInformation.ShortName

- Param5: <Leave it empty>

5 Click **OK**

After these services are defined, a user can order these services to provision a virtual machine from an Advance Catalog and can also track the VM details on Prime Service Catalog My Products & Services web interface.

Overwriting Quota information of a Tenant

Replenish the quota for a tenant using the **UCSD Tenant Error Remediation** service. This service is available out of the box.

As a System Administrator, when you create a Tenant, you can update the Quota details. If the process of creating a tenant fails and the tenant quota is not available, you can call **UCSD Tenant Error Remediation** service. The request goes to UCSD and syncs back all the data to Prime Service Catalog. The Quota values are overwritten to zero.

Restoring VDC and UCSD Container Details

The Restoring VDC and UCSD Container Information functionality allows you to sync the VDC information from UCS Director to Prime Service Catalog and replenish the container details. If the VDC creation process fails, you can restore the VDC by using the **UCSD Container Error Remediation** service. Order this remediation service to retrieve the data services that were lost during the VDC creation process.

Sync Tenant Information from UCS Director

The Sync Tenant Information functionality syncs the tenant resource limit details from the UCS Director to the Prime Service Catalog. This service is used to replenish the Tenant Quota resource (used, available and reserved) limits. When you order a **UCSD Refresh Tenant Resource Limit** services, it automatically syncs the tenant resource limit details from the UCS Director to the Prime Service Catalog and only the Quota detail is refreshed.

Post-Provisioning Operations of UCS Director

Prime Service Catalog when integrated with UCS Director can be used for private cloud management. The lifecycle operations on a private VM are routed to UCS Director. These operations on the VMs are available

from the **My Products & Services** page in the **Service Catalog** module. Role-based access permissions to perform these operations are assigned at the group level by an administrator.

End-users can also order the application stacks for accelerated application development and deployment. When an application stack order is completed, all provisioned applications are displayed in **Service Items > Application Template**. All the application stacks with the child service item show up under **Application Template**.

Note For a Fenced Containers, you cannot delete application templates from My Products & Services. To remove an application template, remove the application template entry from the Service Item Manager and then delete the corresponding application template from the Stack Designer web interface.

Prime Service Catalog supports the below listed out-of-the-box operations. Some of these operations that can be invoked on these virtual machines are a 1-click operation. 1-click operation do not require any input data from the user, for example, "Power Off Virtual Machine".

Note Out-of-box operations marked with asterisk(*) does not support one-click operations.

For VMs (Private Cloud):

- Add vNIC
- Delete vNIC
- Power On
- Power Off
- Reset VM
- Restart VM
- Suspend VM
- Shutdown VM Guest
- Create snapshot
- Revert snapshot*
- Delete snapshot*
- Create/Delete VM Disk*
- Resize VM(CPU, RAM)*
- Clone VM*
- Delete VM
- Standby VM

For UCSD Fenced container:

- Power On
- Power Off

- Clone*

- Delete

- Add VM*

For VACS-bound VMs (CSR, VSG, or ASAv):

- Power On

- Power Off

- Create Snapshot*

For VACS-bound Application VMs:

- Power On VM

- Create VM Snapshot

- Delete VM

- Delete VM Snapshot

- ResizeVM

- Revert VM Snapshot

- Power Off VM

- Reboot VM

- ResetVM

- Shutdown VM Guest

- Standby VM

- Suspend VM

For VACS-bound containers:

Note   These options are available only for VACS Container service item type. Navigate to **Service Catalog > My Products & Services > Service Items > VACS Containers**. These operations can be performed under **Actions** listed for a VACS Container Service Item type.

- Add VMs*

- Power On VACS Container

- Power Off VACS Container

- Delete VACS Container*

- Configure Static NAT*

Note	Configure Static NAT enables static NAT on the virtual machines in a VACS container. When static NAT is enabled, public IP is generated by VACS environment and you can use the IP address assigned to a VM. Click on this option to display a list of VMs under the selected container and from the Static NAT drop down to enable the NAT for the selected virtual machine in the container. To view the VMs inside VACS containers with Static NAT, navigate to **My Products & Services > Service Items > VACS Containers**. Select a VACS container and click on the VACS Container display name. The details of NAT will be displayed under the Static NAT tab.

Virtual Data Center:

- Create, Update, Delete Tenants, Organizations and Users (including setting quota)

- Order empty VDC, Update, and Delete

- Order, Update, Delete VM

- Order and Delete Physical Server

- Add, Remove Disk from Server

- Add, Remove Firewall from VDC

- Add, Remove Load Balancer from VDC

Note	For more information on the VDC operations, see Managing Virtual Data Center.

Physical Server

- Add disk to physical server

- Delete a failed physical server

Adding VM Disk

Create/Delete VM Disk operation is supported on Prime Service Catalog and UCSD 5.5.0.1 onwards.

Step 1 Create VDC from Prime Service Catalog.

Step 2 Add a VM on VDC using the appropriate template. For more information see Managing Virtual Data Center, on page 29.

Step 3 Create VM disk.

    a) In the Overview tab, for the selected Tier, click on the number of VMs.
       The Virtual Machines page appears.

    b) For the corresponding virtual machine click on the gear icon (on the right) and select the Create VM Disk option.
       The Create VM Disk page appears.

c) Enter the required details and click **Submit**.

Adding vNIC to VM

Add vNIC to VM option is supported only for Standard Catalog VM and APIC-container VM. For APIC-container VM, Add vNIC operation works only with isolated network. As a pre-requisite, the tenant administrator must manually configure isolated network for the APIC container in UCSD before creating VM.

Note Add vNIC operation is supported on Prime Service Catalog and UCSD 5.5.0.1 onwards.

Before You Begin

• Configure isolated network for the Create VDC advanced catalog in UCSD. To add isolated network in UCSD do the following:

Caution The below steps are applicable for UCSD 5.5.0.1, refer to the latest Cisco UCS Director Administration Guide for updated accurate procedure.

1 Log in to UCSD and choose **Policies** > **Application Containers**.

2 Select the Container on which the Isolated Network must be added.

3 Click **Add Tier/Network**.

4 In the Add Container Tier/Network window, enter the required fields and check the **Isolate Network** option.

5 Select the tier on which the isolated network must be configured from the **Parent Tier** drop-down list.

6 Click **Submit**.

Step 1 Create VDC from Prime Service Catalog.

Step 2 Add a VM on VDC to the corresponding tier for which the isolated network has been configured in UCSD using the appropriate template. For more information see Managing Virtual Data Center, on page 29.

Step 3 Add vNIC to the VM.

a) In the Overview tab, for the selected Tier, click on the number of VMs.
The Virtual Machines page appears.

b) For the corresponding virtual machine click on the gear icon (on the right) and select the Add vNIC option.
The Add vNIC page appears.

c) Enter the required details and click **Submit**.

Ordering Application as a Service

As a User you can deploy the application services from **My Products & Services**. Go to **Deployments > New Deployment.**. Only those applications for which you have been granted permission to deploy are available in this page.

After these services are ordered, you can track the status of deployment of the application in **My Products & Services** > **Order** page. When the provisioning is completed, Prime Service Catalog updates the attributes for these applications and their statuses can be viewed in the **My Products & Services** > **Deployments** page.

From the Deployments page you can perform the following operations:

• Delete Deployment

For the selected deployment, on the VMs created by the deployment, you can perform the following operations:

• PowerON

• PowerOFF

• Reboot

Managing Unsubmitted Requisitions

An unsubmitted requisition is one that is still in preparation.

• Much like a "shopping cart" on a typical web site, you can place service orders in a requisition to be submitted at a later time.

• When you click **Add to Cart** during the service order process, Service Catalog creates an unsubmitted requisition.

• You can add or delete services, edit Service Order forms, or entirely cancel an unsubmitted requisition.

• This requisition remains unsubmitted until you either place the order or cancel it.

• You may not have more than one unsubmitted requisition. Therefore, Service Catalog places your service requests in an unsubmitted requisition before creating a new requisition.

Note If you are designated to order services on behalf of others or even if you order for yourself, only one unsubmitted requisition is allowed at any point of time.

To view your unsubmitted requisitions:

1 Choose Service Catalog and click the My Cart icon.

2   My Cart page displays your unsubmitted requisition or the unsubmitted requisition you have for others.

Editing an Unsubmitted Requisition

Note   You can only make changes to an unsubmitted requisition. Once submitted, an order can only be cancelled.

From the My Cart page you can edit the order before confirming it. The My Cart page enables you to:

- Add and delete services
- Edit order form information

To edit the order form for a service:

1   In the My Cart Page, click on the service name for which you wish to edit the order form.
2   Edit the order form as necessary.
3   Click **Update**.

To select the quantity for a service

Use the up-down arrow to select the quantity of the service or product ordered. Cost per unit for each service is displayed next to the service selection and the total cost for order is displayed in the Order Confirmation area.

To add a service to an order:

1   Browse and locate the service that you want to order.
2   Order the service and return to the My Cart page.
3   Click **Place Order** to confirm your order.

OR

Repeat step 1 and 2 to add more services to the order.

To delete services within an order:

1   In the My Cart page, select the service you wish to remove.
2   Click **Remove**.

Confirming your Order

Once you successfully order a service, My Cart page displays your services and products you have ordered.

If you want to edit the services before placing on order, see Editing an Unsubmitted Requisition. Once you finish making your changes, click **Place Order**.

If you do not wish to submit the order, click **Update Cart** and Service Catalog saves your work that you can edit and submit at a later time.

Ordering For Others

> ✎
>
> **Note**   If Order For Others does not appear in Service Catalog, you are not authorized to order services for others.

The process you use for ordering services on behalf of another person is very similar to the process you use when ordering services for yourself. After you choose the person for whom you are ordering and the business unit to which it should be billed, the process steps are identical.

- When you order a service on behalf of another, you are the Initiator of that requisition or order.
- The person for whom you order the service is the Customer.

> ✎
>
> **Note**   You can also use the Copy on Behalf feature to order services for others.

To order a service on behalf of another person:

Step 1   From Service Catalog, navigate to the service using the **Browse Categories** tab or the Search icon on the home page.

Step 2   Select the required service and click **Order For Others**.

Step 3   In the Search for Recipient pop up window, enter all or part of the person's name for whom you are ordering, and click the Search icon.

Step 4   Choose the person's name from the list, and then click **Add Selected Recipient**.

Step 5   Enter the required details in the Service Designer module, if you get a service form depending on the ordering mode you configured or click **Add to Cart**.

Step 6   In the My Cart page, review the details of the selected service and click **Place Order**.

Managing Orders

Managing orders involve viewing service items and order status, tracking and cancelling orders, and so on.

Viewing My Products & Services

Use the **Service Items** tab to view your service items and associated services. My Products & Services page displays a service item view that enables you to see the service items that have been provisioned for you and to request further changes and additions to these items.

To view all the service items provisioned for you:

Step 1   Go to **Service Catalog > My Products & Services > Service Items**.

| **Note** | The service Items portlet only appears on the Home page if your system administrator has configured Service Catalog to display it. |

Step 2 Choose the desired service item and view its associated information by clicking the Additional Information, History, Requested With, and Ownership tabs:

Tab	Description
Additional Information	Displays all the additional information for the selected service item.
History	Displays the service order history for the chosen service item. Click the Req # value to invoke the associated requisition details.
Requested With	Displays associated customers and other service items requested with the chosen service item.
Ownership	Displays the owner of the service item.

| **Note** | For the selected service item only those attributes are displayed that has some values associated to them. |

Filtering and Exporting Data

You can quickly sort the information on the My Products & Services page to help you locate a particular service item. You can also export the Service Item results to a Microsoft® Excel® file.

You can filter data using advanced filter available in the All Service Items page (navigate to **Service Catalog > My Products & Services > Service Items**). The application allows you to search for Service Items using the wildcard character asterisk (*).

For example, you can search for Service Item names beginning with the letters "Cis" - Specify Cis* in the value field and click **Go**). Similarly, you can also search for Service Item names containing the letters Cis - Specify *Cis*.

Customizing the My Products & Services Panel Display

You can customize My Products & Services panel to:

- Resize columns

- Sort columns

- Hide columns

- Save view

Resizing a column

Move your mouse between two columns until the column resize cursor appears (⬌). Click and drag it to the desired position.

Sorting a column

Click a column to sort in ascending order (▲). Click the same column again to sort in descending order (▼).

Alternatively, move your mouse over a column until the column sort button appears (▼). Click the column sort button and then choose Sort Ascending or Sort Descending.

Hiding or showing columns

Click the **Edit Columns** drop-down and then select the check boxes to choose the columns to display in the My Products & Services pane. You can choose only four columns at a time. To hide a column, uncheck the check box.

Managing filters in My Products & Services page

You can create a new filter view or edit an existing filter for the service items in My Products & Services. For more information on how to do this, see

Exporting the service Item List to Excel

You can click the **Export to Excel** button to save the Service Item results in the My Products & Services pane to a Microsoft Excel file.

Saving and Retrieving filter in My Products & Services

To create a view filter:

Step 1 Select a filter or search criteria that you have applied.

Note While filtering service items, if you do not insert any wild cards along with the character, it will only display the results that match the exact character.

Step 2 Click the **save** icon and save it in the default view or by any other view name in the **Save View** pop up window.

Note You can create number of filter views based on the maximum limit set by an administrator.

To delete a saved view, select the view from the **Display view** drop-down and click the **delete** icon. The **delete** icon will not appear for a view that has been chosen as a Site default view by the administrator for all the users who navigate to My Products & Services.

To edit a filter, enter the new filter or search criteria and click **Save** in the **Save View** pop up window.

Tracking Order

You can track orders you have submitted for which you are either the customer or the initiator.

From the Service Catalog home page click either on the **My Products & Services** pane or click the plus icon to expand **My Products & Services** from the main menu and click on **Orders**. This page lists all the services you have ordered and displays its status.

Click order number to view the details of the order:

- **Requisition Details section**

The Requisition Details section displays:

- Your requisition number - This is the identifier you use to track the delivery process of the services you have ordered.

- The customer or the initiator of the requisition.

- The business unit that is billed or charged for the services.

- **Services section**

This section displays the quantity and cost for each service, along with its Standard Duration.

> ✎
>
> **Note**   If you ordered a bundled service, the page lists all child services included in the parent service (bundle), such as Telephone [Included in New Hire] and Voicemail [Included in New Hire]. If you want to cancel a bundle, you must cancel the complete order; you cannot cancel individual child services included with the bundle.

- **Delivery Process section**

The Delivery Process section lists the milestones-the major tasks of reviewers, approvers, and service performers-in the service delivery process, along with the Understanding Due Dates for each milestone and its current status.

The following table describes the status of an order:

Status	Description
Preparation	Requisition status pertaining to the time period when the requisition is being created, up until it has actually been submitted.
Ordered	Status assigned to a requisition after submission if the "Submit, Approve and Review Asynchronously" setting is turned on in the Administration module. If this setting is enabled, after requisition submission, the status becomes "Ordered" until it is processed by the Business Engine. Afterwards, the status becomes "Ongoing". See Asynchronous Submission or Last Approval.
Ongoing	Requisition status pertaining to the entire time period after the requisition has been submitted up until it has either been completely fulfilled, or has been cancelled.
Closed	Requisition status pertaining to a requisition that has been completely fulfilled.
Cancelled	Requisition status pertaining to a requisition that has been cancelled--either by its initiator or its customer.
Rejected	Requisition status pertaining to a requisition that has been rejected by an authorizer.

Viewing Order Status Details

The Requisition Status page displays details about the status of a single requisition, along with all the services in the requisition. You can also create and view comments, as well as attach and view documents.

To view order status details:

Step 1   Go to **Service Catalog > My Products & Services** from main page pane or from main menu and click on **Orders**.

Step 2   Click on the requisition number to view the order details.

- **Summary Information**
The Summary section of the requisition displays:

Requisition header	Customer and initiator information, overall status of the requisition, and create/submit dates.
Services within the requisition	The name of each service in the requisition, along with its current status, standard duration, and cost information. Click service name to view the completed order form.
Delivery Process	The Delivery Process section lists the milestones-the major tasks of reviewers, approvers, and service performers-in the service delivery process, along with the due date for each milestone and its current status: • TBD: The due date will be forecast when any required authorizations have been completed. • Approximate: due date forecast has been approximated based on the calendar of the task's default delivery team. • Estimated: due date forecast estimate has been based on the duration of scheduled tasks when order is submitted. • Completed: Indicates if a task in a service delivery plan has been successfully completed. Note : The due date is the date a task must be performed in order to keep the service delivery process on schedule. A late task delays the entire service delivery process.

- **Comments and History**

The Comments and History section displays the comments of reviewers, authorizers, and performers who work on the service request. It also displays a history of actions, such as automated email and task completions, that are logged by the system. In the Add Comments field, enter a comment, and then click **Add**. Your comment will be visible to all users who can view the requisition.

- **Attachments**

The Attachments section enables you to view and attach documents associated with the requisition. To associate a document to the requisition, click **Browse** to locate, choose the file you wish to attach to the requisition, and click **Add**.

Copying a Requisition

You can use an unsubmitted requisition to create a new requisition for you or on behalf of others using the Order Management module.

Step 1   Choose **Order Management > Copy Requisition**.

Step 2   Click the radio button next to the requisition you wish to copy, and then click **Copy Requisition**.

Step 3   Edit the requisition as needed, and then click **Submit Order**.

Copy on Behalf

If you order services on behalf of others, click **Copy on Behalf** to copy the service. Then follow the steps for Ordering For Others.

Note   When you copy a requisition to order on behalf of another person, Order Management creates a new requisition for that person, even if you already have an unsubmitted requisition for that person.

Cancelling an Order

A requisition, or a service within a requisition, can be cancelled by the customer or the initiator within the time frame established by the service team. This is usually a point before significant work has been done or significant cost has been incurred.

You can cancel an entire requisition or one or more services in a requisition.

Note   You cannot individually cancel child services that are part of a parent (bundled) service.

To cancel an entire requisition:

1   Choose **Service Catalog > My Products & Services** from main page pane or from main menu and click on **Orders**.

2   Locate the service you wish to cancel.

3   Click **Cancel** and click **OK** on the confirmation box.

Note   If the **Cancel** button is not available, then you may not cancel the requisition.

To cancel one or more services within a requisition:

1   Choose **Service Catalog > My Products & Services > Orders**.

2 Locate the service you wish to cancel.

3 Click the requisition number for the requisition containing the service you wish to cancel.

4 Under Services, select the services you wish to cancel, and then click **Delete**.

Viewing Completed Orders

You can view all the services you ordered from the Service Catalog module which are already processed.

Step 1 Choose **Service Catalog > My Products & Services** from main page pane or from main menu and click on **Orders**.

Step 2 To view the details of the order click on the order number.

The orders could have the following status:

Status	Description
Closed	Requisition status pertaining to a requisition that has been completely fulfilled.
Cancelled	Requisition status pertaining to a requisition that has been cancelled, either by its initiator or its customer.
Rejected	Requisition status pertaining to a requisition that has been rejected by an authorizer.

For more details of each service, see Viewing Order Status Details.

Managing Servers

This Servers tab available under **Service Catalog** > **My Products & Services** provides information about all of your active servers. Using this tab, you can monitor status, manage snapshots, verify that a server you that ordered has been delivered, and manage power, modify configuration, take snapshots, decommission, and extend an existing lease. These server details are displayed in a table, which includes details such as the server's operating system, organization, and the server owner. You can choose to display more information about these servers in the table by adding more columns to the table. These servers can be filtered by name, user, type, and OS details. The various operations available for these server appears only if the servers provisioning process is completed.

The various operations available for the active server in My Servers are:

- **Create VM Disk:** Use this option to create another disk for the selected VM.

- **Clone VM:** Use this option to create a new VM similar to the one that you want to clone.

- **Create VM Snapshot:** Use this option to create a backup of the selected VM.

- **Delete VM Snapshot:** Use this option to delete an existing snapshot.

- **Reset VM:** Use this option to reset the selected VM.

- **Revert VM Snapshot:** Using the Revert VM Snapshot option, you can choose the snapshot to which you want to revert the virtual machine.

- **Standby VM:** Using the standby VM option, all the processes are temporarily stopped but the virtual devices will remain connected.

- **Suspend VM:** Using this options all the processes are stopped and even the VMs are temporarily turned off.

Virtual Data Centers

As a tenant administrator, you can create Virtual Data Centers (VDCs) for a tenant and add VMs to VDCs. The VDC creation will result in an APIC container, using which you can add VMs.

Each tenant has an agreement tied to it and the creation of VDC is governed by this agreement. For more information on creating a VDC, see the section Adding Virtual Data Center. After the VDC is created, you can update or delete the VDC. For more information on updating and deleting a VDC, see the section Modifying Virtual Data Center.

A tenant user can view and manage all of the VDCs that the user is associated to (or has access to) from the **My Products & Services > Virtual Data Centers**. The user can also perform any supported operation on a VDC that is in Active state. For more information on managing the VDCs, see the sectionManaging Virtual Data Center.

Adding Virtual Data Center

Step 1   As a tenant user, click **Service Catalog** > **My Products & Services** > **Virtual Data Centers**.

Step 2   Click the (+) icon to add a new VDC to your account.

Step 3   In the **General** tab, enter the display name and description of the VDC.

Step 4   In the **Topology** tab, do the following:

a) Select a service from the list of services displayed in the carousal. These are UCS Director APIC container catalogs services that are available in Prime Service Catalog after the UCS Director entities are imported to Prime Service Catalog.
Depending on the type of service selected from the carousal, the number of Tiers are displayed below the carousal.

b) Enter the alias for each of the Tier.

Step 5   In the **Resource Specification** tab, do the following:

a) Choose a VDC size and enter the information for other specifications.
Certain fields such as vCPU and RAM are auto filled based on the selected VDC size. Also, the vCPU, RAM, and Network Throughput details are populated based on the specified allocation in the Standard Data table - **VDC size**, of **Service Item Manager** > **Manage Standards** page.

Note   To ensure that your data is protected in any disaster, you need to turn ON the Disaster Recovery Protected flag. You can enable this flag only if the tenant, for which the VDC is being created, has enabled it. Enabling this flag provides disaster recovery options such as offsite backup, system recovery, replication, and high availability solutions.

Step 6   Click **Submit** to save the new VDC details.

Modifying Virtual Data Center

Step 1   As a tenant user, click **Service Catalog** > **My Products & Services** > **Virtual Data Center**.

Step 2   Click the edit icon on the existing VDC and modify the attributes for that VDC.

Step 3   Modify the details such as the description for the selected VDC in the **General** tab, or modify the resource allocations under the **Resource Specification** tab, or provide VDC access to one or more Organizations by searching for an organization under the **Permission** tab.
A user with a tenant admin role associated to an Organization can view the associated VDCs in the **Service Catalog** module, and perform any supported operation on a VDC.

> **Note**   The quota or the resource limits available for your account is displayed under the **Resource Specification** > **Tenant Resource Quota**. The same information can also be viewed under the **My Products & Services** > **Virtual Data Center** > **Quota** tab. For more information on the Quota, see the section Viewing the Quota Information.

Deleting a Virtual Data Center

As a tenant user, click **Service Catalog** > **My Products & Services** > **Virtual Data Center**. Click the delete icon on the existing VDC and delete the VDC.

Managing Virtual Data Center

A tenant user can view and manage all of the VDCs that the user is associated to (or has access to) by logging into the My Products & Services page. The user can view the VDC details such as the VM's and the physical servers associated with VDC, add a VM, physical server, load balancer, or firewall rule to a VDC, and perform operations such as power off on a VM that is in the active state.

Step 1   Login as a Tenant administrator and select a VDC from **Service Catalog** > **My Products & Services** > **Virtual Data Centers** tab.
Tiers for the selected VDC are displayed. Each Tier contains a set of Virtual Machines and Physical servers.

Step 2   In the **Overview** tab, for a Tier, click the gear icon (on the right) to add a virtual machine, physical server, or load balancer.

> **Note**   • You can add a load balancer or a firewall rule for a VDC only if that VDC has L4-L7 services configured.
>
> • While adding a VM to an existing VDC, depending upon the template used for the operating system, the storage field will be auto-populated in the Add Virtual Machine service form. The storage value displayed in the service form is only an estimated value. When the VM get provisioned, it may gets provisioned with a different storage value.

Step 3   Click the virtual machines or physical servers for a detailed view of all the virtual machines or physical servers.

An information icon 'i' is displayed in the **Status** column, which provides an overlay of requisition, history, comments, along with the date and timestamp. You can refresh the status. Additionally, the information icon is displayed in the **Storage** column, which provides information regarding the disk, provision type and provision size that is in use.

Step 4   In the detailed view (tabular view), when you click the gear icon (on the extreme right for each VM or physical server), you can perform supported operations (such as Power Off, Resize VM, Delete VM, etc) for each VM that is in the Active state.

> **Note**   • You can only a view a list of physical servers; no operations are supported on the physical servers.
>
>   • While performing an operation on a VM, the display name of the VM shows up rather than its logical name.

Step 5   To add a firewall rule, do the following:

    a) Click **Add Firewall Rule** under **Firewall Rule** tab, select a firewall service and, specify the name of the firewall rule, give a description, specify the protocol, action, and the direction of the firewall rule.
       Direction: This attribute can take the values: Inbound or Outbound. Inbound firewall protects the network against incoming traffic and Outbound firewall protects against outgoing traffic originating inside a network.

Step 6   To add a load balancer, do the following:

    a) Click the gear icon to **Add Load Balancer** from the list, which is displayed, and specify the name of the load balancer, give a description, specify the protocol, network probes, port, tags, certificate public/private keys, and add servers, which requires a load balancer.

> **Note**   • By default, Certificate, and Key fields are disabled.
>
>   • After you check the **Enable SSL** check box, the Certificate, and the Key fields get enabled automatically.

> **Note**   • The Resource Utilization graph under the **Overview** tab on My Products & Services page is populated only when you add a VM and not a VDC.
>
>   • Server Administrator can view only the Add Physical server and Add VM options when the gear box is clicked, whereas a Network Administrator can view all of the options.

Viewing the Quota Information

You can view available resources, associated quota information, and the usage information for the tenant under **My Products & Services** > **Service Items** > **Quota** tab. A site administrator assigns the quota to a tenant administrator while creating it.

Using Multi-Tenant IaaS

With Prime Service Catalog, UCS Director and ACI, a service provider administrator can provide infrastructure as a service (IaaS) to multiple tenants quickly and efficiently. This section is meant for tenant administrators who have been delegated administration capability over compute, network and storage resources that have been allocated to their tenant, as well as their end users.

Using the Tenant Management module, a tenant administrator (or a tenant server admin, tenant network admin and tenant storage admin) can manage tenant users, define quotas on computing resources, and virtual machines

for a virtual data center, view the usage reports for virtual data centers, provision new virtual data center, as well as manage firewall and load balancers in his tenant environment. For more information on provisioning a virtual data center and viewing the usage reports for a VDC, see Managing Virtual Data Center and Viewing Reports for a Tenantsections in Cisco Prime Service Catalog 11.1 User Guide.

Creating Organizations and Users

When you create an organization, you can assign users and roles to the users in that organization. The Organization, users, and Virtual Data Centers are synchronized with UCSD after they are created in the Prime Service Catalog application.

Step 1   Log in as Tenant Administrator and go to User Management (click Tenant Admin in the Tenant Management dashboard).

Step 2   Click the **Organizations** dashlet and **New Org**.

Step 3   Enter the necessary details in the **General** tab and click **Save**.

    Note   By default, the **Users, Permissions, Roles and Functional Positions** tabs are displayed for the **Organizations** dashlet. If you do not want these tabs to be displayed, go to **Administration > Settings**, under the Tenant Management group and turn the settings off/disable them.

    This is also applicable for **System Roles, Extensions and Permissions** in the **Users** dashlet.

Step 4   Click **Add Users** in the **Users** tab and search for a user to associate with the Organization.

    Alternatively, you can click **Users** from the **User Management** on the left pane, click **New User** and enter the necessary information for creating a new user.

    Note   When you a create a tenant and it is synched with UCSD, you receive an email from the Prime Service Catalog application with your login information and a link to the application (to activate your account and specify a new password to login to the application).

Step 5   Click **Assign Roles** in the **Roles** tab and search for a role to associate with the Organization.

    Alternatively, you can select **Show Inherited Roles** in the **Roles** tab and choose an inherited role to assign to the Organization.

Step 6   Click **Functional Position** to assign users to the available functional positions (search for a user by entering asterisk (*)).

    You can add a new Functional Position through the **Organizational Designer** module (in the **Functional Positions** page).

    You can also edit the details for an Organization (when the status is **On**) or delete it from the Organizations dashlet. However, you must first change the status to Inactive before you delete it.

Viewing Reports for a Tenant

Using the Usage details, Usage, Cost, and Performance reports, you can view the resource availability and consumption for a vDC, and usage cost and performance of different resources under a vDC.

> **Note**　You can view reports specific to vDCs that you have access to. Only a site administrator can access all the reports.

Viewing and Downloading Usage Details or Cost Details for Virtual Data Centers

You can view the usage details or cost details for a VDC, such as the current VM count breakdown per vDC, the current CPU and RAM usage, the time period for which data is displayed and the units in which the usage is measured for all the virtual data centers (for the respective tenants) that are currently running on UCS Director. Additionally, you can also download the Usage Details or Cost Details report from Prime Service Catalog for all the submitted orders. These reports will not be generated as soon as a VM is created. These reports are generated on the UCS Director and are imported to the Prime Service Catalog. Poller connects to a UCS Director instance, ensuring automatic synchronization and collection of reporting data for all VMs from the UCS Director at scheduled intervals. You can edit the support.properties and newscale.properties file located at `RequestCenter.war/WEB-INF/classes/config` directory to configure the polling interval.

- In the support.properties file, set the poller value as "true", as shown in the example below:

```
###### Reporting Data Poller Settings ###################
# In non-cluster mode: this should be enabled for the Requisitions Data script to be run
from the Poller
# In clustered mode: this can be either enabled on all nodes in the cluster OR on a specific
 node in the cluster
# - only 1 node in the cluster will run at any given time, even if this is enabled on
multiple nodes in a cluster (which ever node starts it first)
reportsData.poller.enable=true
############################################
```

- In the newscale.properties file, change the interval of polling, as shown in the example below:

```
############################################
#Resource Reporting Data Poller
############################################
#Cron Expression wakes up poller every 40 minutes of an hour
• reportsdata.poller.cron=0 0/40 * * * ?
#Cron Expression wakes up health check for 13th min and 15th min thereafter of the hour ex:
 13,28,43,58 minutes
reportsdata.poller.health.check.cron=0 13/15 * * * ?
#High Availability Health checks threshold, this should be greater than Poller cron time
specified in minutes reportsdata.healthCheck.threshold=127
############################################
```

You can also configure the number of days, months, weeks and beginner of the week for which the data needs to be imported in the newscale.properties file. For more information on configuring the polling interval and data import settings, see *Scheduling the Collection of Reporting Data from UCS Director* section of Cisco Prime Service Catalog 12.0 Administration and Operation Guide

Prerequisites

> • Integrate the corresponding UCS Director with Prime Service Catalog. For more information on Integrating UCS Director with Prime Service Catalog, see *Integrating UCS Director (UCSD) with Prime Service Catalog* section of Cisco Prime Service Catalog 12.0 Administration and Operation Guide.

Step 1   From the main menu, go to **My Products & Services** > **Reports**.

Step 2   Click the **Usage Details** or **Cost Details** report to display usage data for all VDC's for all the tenants. These details include the usage details for all the VDC's, such as the name of the Organization, name of VDC, name of resource used, category of the used VDC, and so on.
The **Category** field indicates the status of different resources. For VM, it can be either active or inactive. For CPU and RAM, it can be allocated, used, or reserved.

Additionally, users can apply filters to narrow down search results for Usage Details or Cost Details report by Category, vDC, Resource, and Time.

Note   • You cannot edit the reports as they are imported from UCS Director.

   • When a user clicks on the **Resource Reports** tab, the system by default, system displays the data for the current month for any user (tenant administrator or site administrator).

Step 3   Click **Download CSV** to download the usage data or cost data.

Viewing Usage or Cost Reports for Virtual Data Centers

You can view usage or cost reports for the virtual data centers (for the respective tenants), running on a UCS Director. Using the **Usage Reports** or **Cost Reports** tabs, you can view the graphical and pie-chart representation of the VDC usage details and resource usage details. These reports can be generated per tenant.

For more information on the charts and description for Usage and Cost Reports, see the sectionCharts and Description, on page 36

These reports are generated on the UCS Director and are imported to the Prime Service Catalog at a regular interval using the reporting poller. Therefore, these reports cannot be edited. The Usage Report poller ensures that the reporting data for all virtual machines from the UCS Director is synchronized with UCSD and data is collected from UCSD at a regular interval. You can configure polling interval, number of months, days, and weeks for which the data needs to be imported for the poller in the newscale.properties file. For more information on configuring the polling interval and data import settings, , see the *Scheduling the Collection of Reporting Data from UCS Director* section in the Cisco Prime Service Catalog 12.0 Administration and Operation Guide.

Note   The **Usage Report** or **Cost Report** poller fetches only daily usage data from UCS Director. The aggregate data for the weekly and monthly usage is calculated on the Prime Service Catalog side.

Prerequisites

   • Integrate the Prime Service Catalog with the corresponding UCS Director. For more information on the same, see *Integrating UCS Director (UCSD) with Prime Service Catalog* section in the Cisco Prime Service Catalog 12.0 Administration and Operation Guide.

• Configure the Usage Report poller in the **newscale.properties**.

For more information on configuring the poller, see the *Scheduling the Collection of Reporting Data from UCS Director Section* in the Cisco Prime Service Catalog 12.0 Administration and Operation Guide.

Step 1   In the **Service Catalog** module, go to **My Products & Services** > **Virtual Data Centers** > **Resource Reports** tab.

Step 2   Click **Usage Reports** to display aggregate usage data with respect to all the categories of VDCs, for all the tenants or **Cost Reports** to display the aggregate cost with respect to all the categories of VDCs, for all the tenants. When you click the **Usage Reports** tab or **Cost Reports** tab for the first time without using filters, by default, it shows the monthly usage (usage reports) and monthly cost (cost reports) charts on the screen.
You can also filter the Usage Reports and Cost Reports by Time, i.e. set it to monthly, weekly, or daily, and also filter by VM name.

a) Viewing Monthly Usage Report and Cost Report

    1 Select the **Monthly** option and choose a particular month from the month picker, for example, January 2016.
       Note   The month picker does not allow the user to select any future month, or any month older than N months.

    2 Select the number of months to include in the charts (minimum is 2 and maximum is 12).

    3 Click the **Refresh Charts** button.

The usage reports or cost reports display the aggregate data for all VMs for each month.

b) Viewing Weekly or Daily Usage Reports or Cost Reports

    1 Select the Weekly or Daily option, as per the requirement.
A minimum of 2 weeks should be included to generate the weekly usage report or cost report chart. The weekly report can be generated for a maximum of 5 weeks. Also, the weekly usage reports or cost reports display the first day of the week as Monday. For more information, see the section on modifying the first day of the week in Cisco Prime Service Catalog 12.0 Administration and Operations Guide. In case of daily usage reports or cost reports, a minimum of 2 days needs to be selected. The maximum number of days that can be selected is 31.

       Note   You can only view the Cost Reports of the resources of the Virtual Machines that you have access to.

c) Viewing Usage Reports and Cost Reports for a specific VM

    1 Enter a specific name in the **VM Name** field.
If you do not know the VM name, you can enter 2 or more characters of the name to display the suggested matches in a drop-down list. Select a name from the drop-down and the value will be automatically populated in the VM Name field. You can also add multiple names to the field.

    2 Click the **Refresh Charts** button to show the aggregate data only for that particular VM.

     Note   When you hover the mouse on a graph of a specific usage or cost report, it displays the information for that particular graph only.

Viewing Performance Reports

Performance is a real time data and it's not stored in the Prime Service Catalog tables. Using the **Performance** tab, you can view the line charts representation of the performance of the resources under a vDC. Data points

for performance reportes are generated in UCS Performance Manager. Prime Service Catalog imports these data points through an API call functionality. You can view the performance report for a vDC for an hour, 6 hours, and 1 week. You can also customize the time interval for which you need the performance report.

For more information on the charts and description for Performance Report, see Charts and Description, on page 36

Poller connects to a UCS Performance Manager instance, ensures automatic synchronization and collection of reporting data for all VMs from the UCS Performance Manager at scheduled intervals. The polling interval can be configured in the newscale.properties file. You can edit the newscale.properties file located at `RequestCenter.war/WEB-INF/classes/config` directory to configure the polling interval.

- In the support.properties file, set the poller value as "true" as shown in the example below:

```
###### UCSPM Data Poller Settings ###################
# In non-cluster mode: this should be enabled for the Requisitions Data script to be run
from the Poller
# In clustered mode: this can be either enabled on all nodes in the cluster OR on a specific
 node in the cluster
# - only 1 node in the cluster will run at any given time, even if this is enabled on
multiple nodes in a cluster (which ever node starts it first)
ucspmData.poller.enable=true
###########################################
```

- In the newscale.properties file, change the interval of polling, as shown in the example below:

```
###########################################
#Resource Reporting Data Poller
###########################################
#Cron Expression wakes up poller every 40 minutes of an hour
• reportsdata.poller.cron=0 0/40 * * * ?
#Cron Expression wakes up health check for 13th min and 15th min thereafter of the hour
 ex:
13,28,43,58 minutes
reportsdata.poller.health.check.cron=0 13/15 * * * ?
#High Availability Health checks threshold, this should be greater than Poller cron
time
specified in minutes reportsdata.healthCheck.threshold=127
###########################################
```

For more information on configuring the polling interval and data import settings, see *Scheduling the Collection of Reporting Data from UCS Director* section of Cisco Prime Service Catalog 12.0 Administration and Operation Guide

For information on UCSPM integration, see *Integrating Performance Manager with Prime Service Catalog* section of Cisco Prime Service Catalog 12.0 Administration and Operation Guide.

Before You Begin

Add connection for UCS PM in Manage Connections screen.

Go to **Administration > Manage Connections > UCS Performance Manager** tab

Before You Begin

Step 1 In the **Service Catalog** module, go to **My Products & Services** > **Virtual Data Centers** > **Servers** tab.

Step 2 Click a virtual machine to view the performance details of a VM.

Step 3 Click a specific report displayed under the **Performance** tab. The **Resource Reports** tab launches and displays the performance details of the selected virtual machine for the last one hour. You can view all the other virtual machines that you have access to. You can compare the performance of ten virtual machines at a time .

Note   A Tool Tip at each data point is displayed when you hover the mouse on a specific report.

You can also filter the performance report by vDC.

a) Viewing the Performance Report for a specific virtual machine of a particular VDC:

1   Select a vDC from the **vDC** drop-down.
    Select a name from the drop-down and the value will be automatically populated in the vDC field. You can view
    a list of virtual machines belonging to that particular vDC. Select a virtual machine to view the performance of
    that virtual machine.

2   Click the **Refresh Charts** button to show the aggregate data only for the selected Virtual Machine.

Charts and Description

The following charts are displayed based on the report type you choose:

Name of Chart	Description
Usage Report	
VM Count by Status	Displays the aggregate VM hours, based on the current status - Active or Inactive.
VM Count by vDC	Displays the aggregate VM hours for active status, based on vDC names. You can only select a maximum of 10 vDC names.
CPU Count by Provision Type	Displays the aggregate CPU hours, based on the provision type -Reserved, Allocated, or Used.
RAM Count by Provision Type	Displays the aggregate RAM hours based on the provision type -Reserved, Allocated, or Used.

Name of Chart	Description
Storage Count by Provision Type	Displays the aggregate storage hours for the used and unused storage space based on the provision type - Committed or Uncommitted.
Cost Report	
VM Cost by Resource Type	Displays the aggregate cost of all the resources based on the usage, for a tenant. Following are the Resources type: • Storage • Total cost • Application cost • Physical server • RAM • Network • One Time Cost • VM • CPU • Fixed cost

Name of Chart	Description
VM Cost by Resource Status	Displays the aggregate resource status based on the selected resource type: • VM - Active or Inactive • CPU - Reserved, Allocated, or Used • RAM - Reserved, Allocated, or Used • Storage - Committed or Uncommited • Network - Received data or Transmitted data • Physical server - Half Blade, Full Blade, or Server • Total cost - Total • Application cost - Application • One Time Cost - One Time • Fixed cost - Fixed
VM cost by vDC	Displays the aggregate cost of each vDC when you select the vDCs from the list of vDCs and click **Refresh Chart.**
Performance Report	
CPU Utilization	Displays the CPU utilization of the selected VM.

Name of Chart	Description
Memory Utilization	Displays the memory utilization of the selected VM.
Disk Usage	Displays the disk usage for the selected VM.
Network Usage	Displays the network usage for the selected VM.

Team Management

Once team management is activated by the Site Administrator, every user must belong to a team to be able to order services. When the user first navigates to Teams page from the main menu, the user is provided with two options. User can join an existing team or create a new team. In this release a user can be a member of only one team regardless of his role.

When a user creates a team, he assumes a role of Team Administrator. Users with the team administrator role can view the assets and deployments for the entire team hierarchy. Every user can view the reports, servers, usage information on the dashboard only from the deployments or servers he owns.

Creating Project or Team

If a team is created without a parent team associated with it, then that team is known as root team or Project. To create a sub team, you must associate it with a parent team. In that case, the team admin of the parent team can view the members and assets of the teams in the hierarchy, but cannot manage them.

To create a team:

Step 1   From Service Catalog hamburger menu go to **Teams**, and click **New Team**.

Step 2   Enter the details in the create team form and select the patent team from the drop-down list.
        Note   Do not select a parent team if you want to create a Project.

Step 3   Click **Submit**.
        This triggers an approval email to the team administrator and in case of creation of a project the approval goes to the Site Administrator. The administrator then approves or rejects the request. Post approval or rejection the user is notified through an email.

Joining Team

You can join an existing team from the join team option. To join a team:

Step 1   From Service Catalog main menu go to **Teams**, and click **Join Team**.

Step 2   Search for the team using the Team Name.

Step 3   Select the team you want to join from the list and click **Select Team**.

Step 4   Click **Submit** on the Join team page.
This triggers an approval email to the team admin. The team administrator would receive an email notification to approve the new member to join the team. The team administrator then approves or rejects the request. Post approval or rejection the user is notified through an email.

Managing Approvals

If a Project is created, then the Site administrator would need to approve the creation of the new root team. When a user joins an existing team, or creates a sub team, the team admin approves the new member to join the team or to create the new sub-team. Email notification is sent out to the respective approver.

Approvals are triggered when:

Action	Approver
Creates a Project	Site Administrator
Creates a team/sub-team	Parent Team Administrator
Joins a team/sub-team	Team Administrator

All the approval notification is listed in the **Open Authorization** tab under Notifications with options to approve or reject. The team administrator must review the details before approving.

Step 1   From the main menu choose **Approvals** .

Step 2   Click the requisition number to add any additional Comments and History or file Attachments, if necessary, to support your rejection.

Step 3   In the page navigator, click **Task Details** .

Step 4   Click **Approve** or **Reject** as appropriate.

Leaving a Team

If you desire to leave the team, from the main menu, choose **Teams**. Click **Manage Team** to view the Team Detail page, select your team and click **Leave Team**. A confirmation message appears, you must join a team or create a new team to proceed further.

If you are the team administrator and want to leave the team, you must first promote another member of the team as the Team Administrator. For more info see Promote as a Team Admin, on page 41.

Promote as a Team Admin

As a team Administrator, you can assign the team administrator privilege to some other team member. In that case, you lose all the team administrator privileges. A team can have only one team administrator.

If you are the team administrator and want to leave the team, you must first promote another member of the team as the team administrator. For more info see *Promote as a team admin*.

Step 1   In the Teams page, go to the Team Members area and search for the team member you want to promote as a team admin.

Step 2   Select the team member from the search results, click on the settings icon and choose **promote as a team admin** option.

Step 3   Click **I Agree** on the warning page.

Troubleshooting

- As a Team Administrator, if the Service Items or Deployments are not visible in your team hierarchy then, ensure that the *Service Item permissions refresh* flag is enabled in **Administration > Settings**.

- If a user is unable to order any services, then ensure that the *Allow Service Ordering* flag is enabled in **Administration > Settings**. Also if Team Management is configured, then the user must belong to a Team to order any service from Prime Service Catalog.

Using Service Portal

All users can browse the service catalog, to view services which they have permission to order, and request services for themselves. They can also view any requisitions they have previously ordered. In addition, the Service Catalog home page is configurable so that designated users or groups of users can order on behalf of other users; the user can use the options like View Authorization and Perform Authorization using Order management.

The Service Portal module is a module where the administrators can design and deploy portlets to interact with services, service items, standards, offerings, and other core entities in the application. These portlets are defined using Portal Designer module and displayed in the Service Portal module. An administrator can define any number of portlets and grant permission to users to read or edit data displayed in these portlets.

Legacy Portal Pages

The Service Portal module prior to version 10.0 contained My Workspace and System module page groups by default that are obsolete from 10.0. These pages would appear only if you have upgraded from 9.x versions.

Note If you want to remove these page groups from end user view, please contact your administrator.

Portal Home Pages

A user's preconfigured portal page groups are accessible as tabs along the top of the window. To view a portal page, click on the drop down list of a page group and select the portal page.

- **Site Homepage**

    The Site Homepage is available as part of the standard implementation to display any site-wide information. All users are granted access permission to this portal page. To disable the page, you can remove the read permission of the page from the Anyone role in Organization Designer module.

- **Organizational Unit Homepage**

    In a distributed portal administration model, portal designers may prefer to set up different landing pages for different organizational units to allow end users to access the organization-specific content. Users whose home organizational units are configured with a home page in the Portal Designer settings will have that page as the default landing page in the Service Portal.

- **User Homepage**

    Users can select any portal page they have access to as their own homepage, overriding the default organizational unit default homepage.

Tool Bar of a Service Portal Page

The tool bar in the Service Portal module contains the following tools:

- **Home Page Drop-Down**

    ◦ Home page: Click this tool if you want to return to the page that you have configured as home page.

    ◦ Set as Homepage: The action marks the current active tab as the home page and moves it to the first page group position. When there is only one portal page in the current module, this button is disabled.

- **Edit Page**

    Users who are granted write permissions to the portal page would be able to edit the content and appearance of the page by clicking the Edit page. The only exception is when the page contains inactive portlets or portlets to which the user has no access permissions.

    - **Add Content**

        The Add Content button allows users to add one or more portlets to the current page by checking the appropriate check boxes. The portlets displayed are limited to those for which the user has read permissions.

The number of portlets that can be added to a page is set on the Common Settings subtab (**Portal Settings > General > Common Settings**)—the "Maximum Number of Portlets on a Tab" and "Maximum Number of Grid Portlets on a Tab" settings. When an attempt is made to add a portlet to the page that has already reached one or more of these limits, an error message appears.

• **Edit Page Settings**

The Page Settings tab allows portal users to modify the appearance of the current portal page. The initial settings displayed are inherited from the page as designed in Portal Designer. You may adjust individual settings then click **Apply** to see the effects of your adjustments. Click **Close** when you are done.

• **Save Page**

Click **Save Page** to save your edits to the page. The changes are seen by all users who subscribe to the page.

• **Finish Editing Page**

The Finish Editing Page button takes users back to View Mode. If you have made any changes, be sure to click **Save Page** to save your edits before you click **Finish Editing Page**.

• **Page Tools Drop-Down**

◦ Edit Passwords: External sites that require individual authentication settings can be maintained to allow automatic authentication every time the portlet is accessed. The credentials maintained here are not accessible by other users, including the Portal Designer users.

◦ Create Portal Pages: This options opens a popup window to allow users to add an existing portal page or to create a new page. The new page is added as the last tab in the module by default. It can be moved to a different tab position by mouse drag-and-drop actions as long as it is located after the homepages for the currently chosen module.

The maximum number of tabs allowed in each module is governed by the common settings in **Portal Designer > Portal Settings > Common Settings**. When the user is about to exceed the page limit, an error message appears.The Open Page subtab shows a list of portal pages for which the user has read permissions. To add an existing page, highlight the page and at the bottom of the popup window, click **Open**.

The Create Portal Pages subtab is enabled for users who have the Service Catalog "Manage Portal Pages" capability and write permission to the corresponding portal page group for the currently chosen module.

• **Refresh Portlets**: The Refresh Portlets button reloads the content of all portlets on the page.

Search, Orders, and Approvals

Once a portlet is added to the page in View Mode, it is automatically saved to the page, and cannot be removed unless you enter Edit Mode by clicking on the **Edit Page** tool click the cancel button on the portlet.

Note   These buttons are disabled if the portlet has already been added to the current page. It is hidden if the user does not have Page Write access or appropriate RBAC permissions.

Field	Description
Title	The title of the page, displayed on the tabs at the top of the portal page.
Theme	The color scheme and styles to be used to display the portal page contents. The drop-down box is enabled only for users who have the Service Portal "Manage Portal Page Theme" capability.
Layout	The number of sections and columns to be used to display the portlets that comprise the current page.
Make this page public	Making a portal page public makes it visible to other users. The check box is enabled only for users who have the Service Portal "Make Portal Pages Public" capability.
Column <n>Width	For each column in the Layout, the user can specify the percentage of the browser width that the column should take up. The percentages should not exceed 100 percent.
Portlet Borders	True if each portlet should have a border around it; false otherwise.
Portlet Headers	True if the grid column headers should be displayed; false otherwise.

See the *Modifying Filtering for Reserved Portlets* section of the Cisco Prime Service Catalog 12.0 Designer Guide for information on these Reserved portlets. In a Reserved portlet, click the **Settings** button to edit settings for that portlet. Click the **Cancel** button to remove the portlet from the page.

Accessing an External Site in the Portal

Portlets with automatic authentication enabled for external sites can be included on any portal pages.

If the included site has been defined with global authentication, the application will pass the preset credentials to the external site for authentication and display the site's portlet on the current portal page. If the included site does not have global authentication enabled, the application will attempt to connect to the portlet with the site authentication credentials that the user has previously defined through Edit Password settings in the portal front-end.
The Edit Passwords page lists all sites associated with portlets displayed on the user's portal page that are enabled for automatic authentication but do not use global authentication. The user may enter connection information for all external sites and save the settings for use in other portal pages. The saved settings are preserved for the current session in which the portal page is displayed or until the associated site times out. If the user navigates to another page or module and returns to the portal page, automatic authentication will take place again.

Users are prompted for login or authentication exceptions by the external site if:

- the connection to the external site has already timed out when the user attempts to refresh the data in the portlet, or

- the credentials defined for the user have expired or are incorrect, or

- no credentials are found that match the site name referenced in the portlet.

Authorizing Orders

Once an order is submitted by an end user, a manager or supervisor must review and authorize the service from the Order Management module. Order Management module enables you to :

- Track and review all your open and completed requests, including the ones that are submitted on behalf of other people.
- Order for yourself or on behalf of others by copying an unsubmitted requisition.
- Track and review all the authorization requests assigned to your or queues that you have access to.

Note　If Authorizations option does not appear in your Order Management navigation bar, it is because you do not have the privilege to review or authorize service requests.

A service request may require authorization by one or more persons before it can be delivered. A service may also be subject to a review by one or more persons.

- An Authorization task allows the service delivery process to progress to the next task only when the service is authorized. If the service is rejected, the entire delivery process stops and the service is not delivered.
- A Review is an "information only" task. Only when a service is reviewed the service delivery process progresses to the next task. Reviewers cannot reject a service request.

This chapter contains the following sections:

Types of Authorizations and Reviews

Authorization and reviews are required for service request or product to move forward. Lack of authorization by an assigned approver stops the service delivery process. Service requisitions can be subject to two kinds of authorization:

- Departmental Authorization: Business units authorize service/product requests based on need and departmental budget.

- Financial Authorization: Financials group authorizes based on overall company policies and budget. At most sites, the financials authorization is required only for more expensive requests.

Typically, the person from the business unit who authorizes requests is a manager or supervisor.

Adding Information to a Task

Dependent on the system settings, authorization task information may appear in the same browser window or in a separate popup window when clicking the requisition number of a particular task on the Authorization tab. This setting is configured by your application administrator in the Administration module.

Task displayed in a Popup Window

When the authorization task is for a service, the Task Data section appears upon landing the page. You may enter any additional information required for the task, and then click Update to save your changes.

When the authorization task is for a requisition, the Task Details section appears instead:

Task Details	Provides the Task name and the Due On. Due On indicates the date after which this task is late.
Requisition header	Customer and initiator information, status of the requisition, and create/submit dates.
Task Information	Requisition status and key dates for the Review task.
Services in the Requisition	The name the service in the requisition, along with its current status, standard duration, and cost information. Click the service name to view/edit the task data.

Task displayed on Authorization Tab

When the task popup option is disabled, the Services section appears upon landing the page. To view/edit the task data of any of the services included in the authorization task, click the service name within the Services section.

In addition to reviewing or authorizing a task, you can add comments and attachments associated with your approval/review.

Comments and History

The Comments and History section displays the comments of reviewers, authorizers, and performers who work on the service request. It also displays a history of actions, such as automated email and task completions, that are logged by the system.

To add a comment to a requisition:

1 In the page navigator, click **Comments and History**.

2 In the Add Comment field, enter a comment, and then click **Add**.

Your comment will be visible to all users who can view the requisition.

Attachments

The Attachments section enables you to view and attach documents associated with the requisition.

To attach a document to the requisition:

1 In the page navigator, click **Attachments**.

2 Click **Browse** to locate and choose the file you wish to attach to the requisition.

Ad-Hoc Tasks

An Ad-Hoc Task is a one-time task that you create for a service performer or queue. After the Ad-Hoc task is created, it appears in the performer's My Work view if it is assigned to a person, or in the Available Work if assigned to a queue.

To create an Ad-Hoc task:

1 In the page navigator, click **Ad-Hoc Tasks**.

2 Click **Search** next to the Performer box to search for a person or queue.

3 Search for and choose the person or queue you wish to assign to the task.

4 Enter an Expected Duration and any necessary instructions.

5 Check or uncheck the Pause current task until this ad-hoc task completes check box, and then click **Start Ad-Hoc Task**.

Authorizing a Service

Service Group authorizations are performed on a single service. You can view information about the requisition, as well as review information about the particular service.

To approve or reject a service:

Step 1 Choose **Order Management > Authorizations**.

Step 2 Click the requisition number to add any additional Comments and History or file Attachments as necessary to support your approval/rejection. You can also create an Ad-Hoc Tasks.

Step 3 If necessary, review any authorization task information. For more information on viewing and adding information to a task, see Adding Information to a Task.

Step 4 Click **Approve** or **Reject** as appropriate.

To communicate with the requisition customer:

• Click the Customer E-Mail address in the requisition header to open a preaddressed email to the customer in your default email client.

OR

- Use the Comments and History section to enter a comment that will be visible to all users who can view the requisition.

Authorizing a Requisition

Financial authorizations and departmental authorizations enable you to authorize or reject an entire requisition, or individual services within a requisition. To reject one or more services in a requisition:

Step 1	Choose **Order Management > Authorizations**.
Step 2	Click the requisition number to add any additional Comments and History or file Attachments, if necessary, to support your rejection.
Step 3	In the page navigator, click **Task Details**.
Step 4	Check the check boxes next to the services you want to reject.
Step 5	Click **Reject**.
Step 6	Click **Approve Requisition** to approve the remaining services in the requisition.

Approving an Entire Requisition

To approve or reject an entire requisition:

Step 1	Choose **Order Management > Authorizations**.
Step 2	Click the requisition number to add any additional Comments and History or file Attachments, if necessary, to support your rejection.
Step 3	In the page navigator, click **Task Details**.
Step 4	Click **Approve Requisition** or **Reject Requisition** as appropriate.

Reviewing a Service

Service Group Reviews are performed on a single service. To review a service:

Step 1   Choose **Order Management > Authorizations**.

Step 2   Click the requisition number to add any additional Comments and History or file Attachments necessary to support your approval/rejection. You can also create an Ad-Hoc Tasks.

Step 3   In the page navigator, click **Task Details**.

Step 4   Click **Done** to indicate that you have completed your review of the requisition.

Reviewing a Requisition

Departmental Reviews enable you to review all of the services in a requisition. To review a requisition:

Step 1   Choose **Order Management > Authorizations**.

Step 2   Click the requisition number to add any additional Comments and History or file Attachments as necessary to support your approval/rejection. You can also create an Ad-Hoc Tasks.

Step 3   In the page navigator, click **Task Details**.

Step 4   Click **Done** to indicate that you have completed your review of the requisition.

C H A P T E R **3**

Managing Work Assignments

Service Manager module allows service teams to review, administer, and track service requests and their associated delivery tasks. Service Manager is a work management tool that allows service team members to:

1 View and complete work assignments

2 Forecast and manage their work load

3 Assign work to other members of the team

4 Track time spent on service requests and billable rate

5 Monitor and manage the service delivery process

Users of Service Manager include:

- Service Performers, see Performing Work

- Service Team Managers, see Managing Service Team

- Service reviewer, see Reviewing Tasks

- Authorizers, see Authorizing Tasks

- Overall delivery plan managers, or Project Managers, see Managing a Project

This chapter contains the followings sections:

Delivery Process

Delivery process is a set of system defined tasks to complete a service request. When a delivery process begins, all tasks in the Delivery Plan are created:

- A Delivery Plan can comprise of both sequential tasks and concurrent tasks.

- An Ongoing task is one that has begun.

- A New Task is one that has been created, but is dependent upon the completion of a previous task before it can begin.

- A Complete Task is one that has been submitted as Done by a Service Performer.

When performing work, a Service Performer:

- Logs into Service Manager.

- Browses and chooses the task to complete.

- Performs the task.

- Submits the task as complete.

Fulfillment Management Roles

Roles

A role combines: access to a module with one or more capabilities, and in some cases, one or more object-level permissions.

A Capability provides the means to perform certain functions within a module. For example: Browse for Services (in My Services).

A Permission grants rights to act upon an object. For example: Order for Others (of a person or OU).

Roles are organized using a hierarchical structure of containers, much like folders. This structure allows for parent-child relationships between roles, in which child roles inherit the capabilities, permissions, and members from parent roles.

System-Defined Roles

Organization Designer module provides a large number of predefined roles for your use. These roles reflect the majority of use cases an average company may require for each of their users. Therefore, in general, these predefined roles should be suitable for the majority of roles needed. If you need additional roles, you can create a new role or better yet copy an existing role and modify it to meet your needs.

In the Organization Designer user interface, system-defined roles are marked with a ⬤.

The system-defined roles affecting the Service Manager module are grouped in the following hierarchy:

Table 2: Types of Roles

Request Fulfillment Roles	Roles supporting the ITIL process of Request Fulfillment, with the Solution Area of Service Operations, including Request Self-Service, Request Governance, and the management and automation of fulfillment activities.	
	Subcontainers	**Description**
	Fulfillment Automation Roles	Roles supporting the automation of service request fulfillment and delivery.
	Fulfillment Management Roles	Roles supporting the fulfillment of service requests.
	Request Governance Roles	Roles supporting the governance of service requests.
	Request Self-Service Roles	Roles supporting the initiation and tracking of service requests.

Fulfillment Management Roles

Table 3: Roles and Capabilities

Role	Description / Capabilities
Service Manager	• **Perform Work**-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor. • **Manage Work**-Grants the Service Team view; allows user to assign work, set task priorities, reschedule task due dates. • **Create Ad-Hoc Tasks**-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks. **Note** This role is used solely in migration of personnel from previous versions of Request Center. In Request Center 2007, it was referred as the Service Team Manager role.
Service Performer	• **Perform Work**-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor. • **Create Ad-Hoc Tasks**-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks. For more information, see Managing Work, on page 78.

Service Team Administrator	• **Search All Performers**-Allows the user to search for all performers in the system from the search box in the navigation pane. • **Perform Work**-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor. • **Manage Work**-Grants the Service Team view; allows user to assign work, set task priorities, reschedule task due dates. • **Create Ad-Hoc Tasks**-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks. • **Perform Global Delivery Search**-Allows the user to search for all tasks and requisitions within the system, not just the ones assigned to the user.
Service Team Manager	• **Search All Performers**-Allows the user to search for all performers in the system from the search box in the navigation pane. • **Perform Work**-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor. • **Manage Work**-Grants the Service Team view; allows user to assign work, set task priorities, reschedule task due dates. • **Create Ad-Hoc Tasks**-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks.

Understanding Requisitions

Requisitions are the forms on which service requests are drawn up. When a service is requested within My Services, a requisition is created. Requisitions contain information on who created the request, who will receive the service, and general information about the service being requested.

The hierarchical structure of requisitions to tasks is as follows:

- Requisitions.

- Requisitions contain service requests.

- Service requests are composed of several tasks required to complete the request.

Viewing Requisition Information

Within Service Manager, you can view requisition information by using the Requisitions view.

To view requisition information:

- Under My Views of the Navigation Pane, click **Requisitions**.

- In the Data Pane, click the requisition number for the requisition you wish to view.

Understanding Tasks and Task Status

A task is a defined piece of work that is considered as one step in Delivery Process. A task is performed by a member of a service team, and is performed in order to complete the delivery of the service.

There are several types of tasks within Service Manager:

Types of Tasks

Ad-Hoc	A new task being created by the performer while executing tasks in a predefined process, such as pricing, authorization, and service delivery.
Authorization	Task that requires the performer to allow a request for service or product to move forward. Lack of authorization stops the delivery process.
Review	Concurrent task that requires the performer to review and approve a step in the delivery process. Until the performer approves the step, the delivery process is placed on hold.
Delivery Task	Activity assigned to an entity that is a step in the delivery plan and has a due date.
External Authorization	Authorization task delegated to a system other than Prime Service Catalog.
External Review	Review task delegated to a system other than Prime Service Catalog.
External Task	Delivery task delegated to a system other than Prime Service Catalog; for example, help desk or financial systems. It has a due date and can be terminated.
Monitor Delivery Task	Task assigned to the Service Manager role of **project manager** that allows the manager to view the entire delivery process. It allows the manager to assign and reassign tasks, cancel the delivery process, and declare the process closed.
Pricing	Optional task created by Prime Service Catalog when pricing for a service is configured as "pricing required". Pricing task precedes any authorization or review task, and the action taken is to enter a price and click **Assign Price**.

Defining Task Status

Task status is the current state of the task. The following are statuses a task may be assigned during the delivery process:

Task Status

New	Created task within the delivery process. Task is not initiated until preceding Ongoing tasks are completed.
Ongoing	Task that is currently active.

Waiting	Ongoing task that is placed on hold if an Ad-Hoc task is created that precedes the ongoing task. The ongoing task is changed to Waiting, until the Ad-Hoc task is completed.
Cancelled	During the delivery process, if the initiator or customer of an order cancels the order, all tasks not complete change to the Cancelled Task status. In addition, if an Ad-Hoc task is not complete once the delivery process is complete, the Ad-Hoc task changes to the Cancelled Task status, and no longer requires completion.
Being Reviewed	Status assigned to an ongoing review task.
Reviewed	Status for a task that has been reviewed and approved.
Completed	Status for a task that has been completed.
Skipped	Task that is deemed unnecessary (for example, by a branching workflow), and therefore not performed.
Authorized	Task that has been approved by the financial or organizational unit responsible for the service.
Being Approved	Status for a task that is in the process of being approved by a service group.
Approved	Status for a task that is approved by a service group.
Rejected	Status of an authorization task where the authorizer rejects the service request.

Understanding Due Dates

Due Date is the date and time an individual task, or an entire delivery plan, should be complete. This date is determined using the durations agreed upon in the Service Level Agreement or Operating Level Agreements used in configuring the service.

The date and time is calculated based on the performer's work day, and is displayed according to the specified time zone of the performer.

Due dates are calculated at the time the requisition is submitted, and then **recalculated** once all authorizations, if any, are completed. Once this recalculation is made, the due date no longer undergoes recalculation.

Example:

A Service Level Agreement stipulates that a particular service has three tasks:

- One authorization task - Duration for the authorization task is up to 8 business hours to complete.

- Two delivery tasks - Durations for each delivery task is up to 8 business hours to complete, totalling 16 hours.

Therefore, once the service request is submitted, the due date calculates based on a duration of 24 business hours to complete: 8 hours for the authorization and 16 hours for the delivery tasks.

The performer assigned to the authorization task only works 4 hours per day. Based on this and the 8 hour duration allowed for authorization, the due date would be 2 days after the scheduled start date and time.

Once the authorization task is complete, then the due date is recalculated. Due date is no longer based on 24 hours, but rather only 16 hours, the number of hours for delivery after all authorizations are complete.

Understanding Queues

Queues are lists of tasks to be completed. Queues act as a repository for tasks organized by similar function, and are set up and managed in Organization Designer.

Queues are useful because they allow any person with rights to the queue to have access to the tasks. This prevents a task from being dependent on any one individual.

A service performer or manager can view a list of queues in which they perform work by expanding the list in the Navigation Pane. An individual's view of queues in Service Manager is governed by their Fulfillment Management Roles.

Using the Action Buttons

Various action buttons are available when using Service Manager, depending on your role:

Action Buttons in Service Manager

Approve	Used in departmental authorizations, service group authorizations, and financial authorizations. It is used to approve a requisition or service request. Clicking it results in the continuation of the delivery process.
Cancel	If this option is configured, allows a Task Supervisor to cancel a delivery task. After this action, service delivery proceeds as normal.
Cancel Plan	Used by Project Managers of a service delivery plan to cancel delivery of a service request during the delivery process phase. Delivery of the service request does not continue when this action is taken.
Check In	Moves a task from an individual's work list to the work queue to which it was previously assigned.
Check Out	Moves a task from a work queue to an individual's work list.
Done	Completes a service delivery task or an Ad-Hoc task.
OK	Used for departmental reviews and service group reviews.
Reject	Used in departmental authorizations, service group authorizations, and financial authorizations. The service request is rejected and delivery ceases to continue.
Reject Selected	Displays for departmental authorizations and financial authorizations where there is more than one service request associated with the requisition.
Reschedule	Used by Service Team Managers or Project Managers to reschedule the due date for a task in a delivery plan.
Skip	If configured, used by a task supervisor to skip a delivery task that has not started. Service delivery proceeds as planned, with the exception of the skipped task.

Searching, Filtering, and Creating Views

The default view that is displayed when you log in to Service Manager module and search facilities are governed by the interaction of:

- Role, see Fulfillment Management Roles

- Queue Access, Understanding Queues

- Permissions

- OU Membership

- Transaction Status

Based on these settings and assignments, Service Manager allows you to search for various tasks and requisitions having a particular status, and for various people, queues, and/or service teams.

Search Methods

There are three search methods in Service Manager:

- Navigation Pane search - Searches for queues, performers, or service teams.

- Task Pane search - Searches for tasks.

- Filter and search - Filters the current data pane view, search for tasks using multiple criteria, and create views.

Global Search

When conducting a normal search, results that display reflect those tasks that you have been granted permission to view. On the other hand, you may have been given permission to search for all tasks within the system that fit the search criteria, not just the ones you are allowed to see. This permission is granted using Organization Designer by your administrator, therefore check with your administrator for assistance.

If granted this permission, a Global Search check box displays next to the Conducting Task Pane Search, and when conducting a Searching, Filtering, and Creating Views.

This allows you to either search only those tasks that you have been given permission to view, or click **Global Search** to view all tasks within the system that meet your search criteria.

Conducting Task Pane Search

The Task Pane Search enables you to locate tasks based upon your search criteria and status criteria.

The search criteria and status criteria available to you are determined by the Service Manager view in which you begin your search.

Task Pane Search

Service Manager View	Search Criteria	Status Criteria

• Available Work • My Work • My Late Work • Work Forecasts	• Flag • Priority • Attachment • Requisition • Due Date • Task Name • Service Name • Initiator • Customer OU • Customer Name • Performer • Queue • Schedule Start Date • Effort • Task Type	• New • Ongoing • Cancelled • Under review • Completed • Skipped • Authorized • Being approved • Approved • Rejected • Reviewed • All New - Finds all that are in any of the following statuses: New, Ongoing (Waiting), and Scheduled. • All Ongoing - Finds all that are in any of the following statuses: Ongoing, Under Review, and Being Approved. • All Closed - Finds all that are in any of the following statuses: Completed, Cancelled, Rejected, Skipped, Approved, and Reviewed. • All Tasks - Finds all tasks regardless of status.
Requisitions	• Requisition • Submit Date • Service Name • Initiator • Customer OU • Customer • Expected Duration • Current Cost • Created Date	• Ongoing • Cancelled • Closed • Rejected • Delivery Cancelled

To search retrieved tasks:

Step 1 On the Home page, choose a search criteria from the Task Search drop-down list.

Step 2 Specify associated search criteria in the field that appears after you choose an initial criteria.

Step 3 Choose a status criteria from the Status drop-down list.

Step 4 Click **Search**.
Search results appear in the Data Pane.

> **Note** If you search for tasks associated with a flag of a specific color, and the search results yield a task associated with a flag of a different color, that is because the status of the task has changed from that associated with the specified flag to that of the different flag. For example, a blue flag task may appear as a red flag task if the task has changed to a late status.

Sorting by Column Heading

You can quickly sort the current task information displayed in the Data Pane by column heading, in either ascending or descending order, by clicking the sort arrow for that column.

An ascending or descending arrowhead signifies that the column is being sorted accordingly, while ⬍ signifies that the column is currently not sorted.

Filtering and Searching

Filter and Search is a powerful tool that enables you to expand your search for a task or requisition beyond the limitations of the basic Conducting Task Pane Search.

Using Filter and Search you can:

- Show and hide columns

- Set filters using Boolean expressions

- Apply your settings to search in the current view

- Save your settings as a new view

To effectively use Filter and Search, you must have a basic understanding of the following concepts:

- The difference between a task and a requisition.

- The difference between a customer and an initiator.

- The lifecycle of tasks and requisitions, and the status which can be associated with each, such as New, Being Approved, Ongoing, Cancelled, Completed, and so on.

- The task types for which you are responsible, such as Monitor Task, Authorization Task, Delivery Task, External Task, and so on.

Searching for a Task

You can search for a particular task using Filter and Search from any of the task-based views.

Note   You cannot search for a task from the requisitions view.

- You can use one or more of the filters, in any set of combinations, which are available to you in the Filter and Search window.

- There are no restrictions imposed on the basis of permissions or task status. You can, therefore, locate a task for which you are unable to perform work.

- The ability to locate a task does not change any of the permissions, including dictionary permissions, associated with that task.

To search for a particular task using filter and search:

Step 1   On the home page, click the view name associated to the tasks you wish to view.

Step 2   Click **Filter and Search**.

Step 3   Choose your search and filter criteria. See Filter and Search Criteria.

Step 4   If you wish to save your criteria, type a new view name in the **Save view as** field, and then click **Save**.

Step 5   Otherwise, once you complete all your selections, click **Apply Now**.

Searching for a Requisition

You can search for a particular requisition using Filter and Search only from the Requisitions view.

Note   Requisitions contain a limited amount of information which is generally not useful to a typical service performer.

To search for a particular requisition using Filter and Search:

Step 1	Under My Views of the home page, click the **Requisitions** view.
Step 2	Click **Filter and Search**.
Step 3	Choose your search and filter criteria. See Filter and Search Criteria.
Step 4	If you wish to Saving a View, type a new view name in the Save view as field, and then click **Save**.
Step 5	Otherwise, once you complete all your selections, click **Apply Now**.

Creating Views

Filter and Search enables you to create, save, and manage personalized views. A Personalized View is a collection of search filters and other settings which you choose using Filter and Search, and then save to be reused any time you return to Service Manager.

Tips to remember:

- You can filter the standard views while you are using them, but your filter settings are not retained once you leave that view.

- You cannot permanently modify any of the standard views, such as My Work, Available Work, and so on.

- You can name, and save as a personalized view, any collection of filter settings you create.

- A personalized view is available to you, and only you, any time you return to Service Manager.

- Only you can modify or delete your personalized views.

- You cannot choose a personalized view as the default Service Manager view in your Preferences. Only a standard view can be chosen as the default view.

- You can neither share a personalized view with another user, nor publish it in any way.

- Only the site administrator can create new views and make them public.

- There is no way for the site administrator to selectively make a view public. Public views are visible to 100% of Service Manager users.

- You cannot hide a public view.

Filter and Search Criteria

There are several variables you can use while Searching for a Task or Searching for a Requisition using Filter and Search:

Task	Description
Filtering Column Data	Enter the desired filter information in the Filter column.
Rows Displayed	You can choose the maximum number of rows displayed in any view.
Choosing Columns	You can choose which columns are displayed in any view.

Task	Description
Moving Columns	You can change the order in which columns are displayed in any view. **1** Choose a column by clicking on the column name. The shading of the column changes when it has been selected. **2** Click the Up or Down arrow to move the column in the display.
Ascending/Descending Order	You can set the display of information in a view either by Ascending or Descending order for a particular column.
Grouping	You can group the display of information based on a single column. Results in the task pane displaying dues date sorted in ascending, and grouped within due date by service name.

Saving a View

Filter and Search allows you to create custom views for searches you conduct frequently. These views appear on the Navigation Pane under My Views. Custom views appear in *italics.*.

To save a view:

Step 1   On navigation pane, click the view name associated to the tasks you wish to view.

Step 2   Click **Filter and Search**.

Step 3   Choose your search and filter criteria. See Filter and Search Criteria.

Step 4   In the Save view as field, type a new view name, and then click **Save**.

Deleting a View

Custom views created are displayed under My Views of the Navigation Pane. These views appear in italics.

To delete a custom view:

Step 1   Under My Views of the navigation pane, click the view name to open the view you wish to delete.

Step 2   Click **Filter and Search**.

Step 3   In the lower left of the Filter and Search Criteria window, click **Delete This View**.

Performing Work

Work is performed by a Service Performer. A Service Performer is a staff member within a delivery organization that is responsible for performing work, and thus completing tasks within a delivery plan. An example of a service performer can be a member of an IT department who is in charge of all hardware inventory, and so on.

Within Service Manager, a Service Performer can:

- Browse through a list of work tasks for that particular performer. See Browsing Work.
- Check out work in order to track work information while performing the task. See Checking Out Work.
- Check work in to mark the work task as complete. See Checking In Incomplete Work.
- Print task information. See Printing Tasks.
- Use My Calendar to add task deadlines to Microsoft Outlook. See Using My Calendar.

Browsing Work

The Navigation Pane in the Service Manager home page allows:

- Service performers to view and manage their own work.
- Service managers to manage their team's assigned tasks, and assign or reassign workload, as needed.

There are several default views available in Service Manager.

Default Views in Service Manager

Default Views	Description
Available Work	Displays ongoing tasks assigned to your queues.
My Work	Displays ongoing tasks that you have checked out of available work, and ongoing tasks that have been assigned specifically to you.
My Late Work	Displays ongoing tasks that have not been completed by their due date.
Work Forecasts	Displays new tasks assigned specifically to you. These tasks have not yet started; therefore they are not yet ongoing.
Recent Requisitions	Lists all requisitions for which you have performed work.
Historical Requisitions	Helps in migrating the completed requisitions like: "Closed", "Canceled", "Delivery Canceled" or "Rejected" status to historical transaction tables.
All Queues	Displays all queues in which you perform work.
Service Teams	A management view, displaying all service teams and members you manage.

You can create custom views to appear in the Navigation Pane. Default views appear in regular font, while custom views you create appear in italics. For more information on creating custom views, see Creating Views.

To view tasks:

1 Expand the desired list in the Navigation Pane.

2 Click the **view name** to display those requisitions associated with the tasks.

You can quickly find your work by clicking My Work in the Navigation Pane's My Views list.

Opening a Task

There are several ways to open tasks. You can:

- Open a single task

- Open multiple tasks

Once open, you can view all task information. If you wish to perform the work for this task, you must check out the task once it is open. This prevents multiple performers from completing the same task. You can then enter necessary information and mark your work as done.

Opening a Single Task

To open a single task:

Step 1 Browse to view a list of tasks. See Browsing Work.

Step 2 In the Data Pane, click the requisition number of the task.

Note Clicking the service name or task name link displays the associated task's information in the preview pane, but does not open the task.

Opening Multiple Tasks

Opening multiple tasks to work, opens the tasks as tabs and you can work on them one after the other. To open multiple tasks:

Step 1 Browse to view a list of tasks. See Browsing Work.

Step 2 In the Data Pane, check the check box next to tasks you wish to open.

Note You can also open a single task by placing a check mark in a single check box.

Step 3 Click **Open** to open the tasks.

Step 4 To navigate between tasks, click the associated number on the navigation bar.

Numbers are assigned to tasks based on where the tasks appear on the Data Pane. Tasks listed first appear first, and so forth.

Working With Tasks

Performing work consists of opening a task, checking it out, executing the work while entering necessary task data within Service Manager.

The following list is a typical sequence of tasks performed by a Service Performer to execute the work and bring it to completion.

1 Open your checked out task. See Checking Out Work, and Opening a Task.

2 View the task details which provide high-level information for a task. See Viewing Task Details.

3 View the task data to review the order form information provided by the customer, and update the data, if required. See Viewing and Editing Task Data.

4 Mark the completed activities in the checklist before you can mark the task as complete. See Completing Checklist Items.

5 View all tasks in the delivery process and edit the necessary details. See Viewing and Editing Delivery Process.

6 Add comments and additional information to the task. See Adding Comments to a Task.

7 Add attachments to the task, if any. See Adding Attachments to a Task.

8 Create Ad-Hoc tasks, if necessary. See Viewing and Creating Ad-Hoc Tasks.

9 Enter the billable hours and information for work effort. See Tracking Work Effort.

10 Complete the work. See Completing Work.

Checking Out Work

Before you perform a task, you must check out the task. The check out step is important because it prevents multiple performers from completing the same task. Checking out the task moves the task to your My Work. To check out work:

Step 1 Browse to view a list of tasks. See Browsing Work.

Step 2 In the Data Pane, check the check box next to the task you wish to open.

Step 3 Use one of the following methods to check out the task:

- Click **Open** to open the task, and then click **Check Out**.

- Click the arrow on the **More Actions** box, and then choose **Check Out**.

Opening a Checked Out Work

Review the task that has to be performed by opening the task and viewing all the details of the task. To open checked out work:

Step 1   Under My Views of the Navigation Pane, click the view name of the checked out task.
For example, if you only check out work, the task will appear in your My Work view.

Step 2   In the Data Pane, check the check box next to the task you checked out.

Step 3   Click **Open** to open the task.
You can now view the task's navigation links:
Task Information

Viewing Task Details	Displays all information about the task, including its scheduled start date, requisition details, pricing, and standard duration.
Viewing and Editing Task Data	Displays the order form data provided by the customer, as well as any data fields used by service performers.
Delivery Process	Displays detailed information about each task in the delivery process.
Adding Comments to a Task	Displays user comments added by any user, system history, and allows you to add comments.
Adding Attachments to a Task	View and add attachments.
Viewing and Creating Ad-Hoc Tasks	Create Ad-Hoc tasks.
Completing Checklist Items *	Displays checklist items, if any.
Tracking Work Effort*	Enter detailed time-on-task information, and other measures of task cost.
Viewing Task Instructions *	Displays additional task information, if any.

* These attributes appear if configured for the current task.

Viewing Task Details

Task Details provides high-level information for a task. To view task details:

Step 1   Open the task for which you wish to view details. See Opening a Task.

Step 2   Click **Task Details**.

Step 3   The Task Details page contains the following fields:

Task Details	Name	Name of the service task.
	Due on	Calculated due date for the particular task.
Requisition	Requisition Number	Click to open the Requisition Status page.
	Customer	Click to display the customer's profile.
	Customer E-Mail	Click to send an email to the customer.
	Customer Work Phone	Work phone number of the customer.
	Bill To	Click to display the customer's organizational unit information.
	Status	Requisition status.
	Initiator	Click to display the initiator's profile information.
	Created Date	Date on which the requisition was created.
	Submit Date	Date on which the requisition was submitted. Submit date may be different than create date if the requisition was initiated, but was not submitted until a later time.
	Closed Date	Completion date for the requisition.
Task Information	Performer	Click to display associated user or queue profile.
	Priority	Choose high, normal, or low priority.
	Scheduled Start	Calculated start time for the task, based on the service agreement.
	Due on	Calculated due date for the task, based on service agreement.
	Status	Current task status.
	Follow Up	Choose the appropriate flag for the task.
	Started On	Actual start date.
	Completed On	Actual completion date.
Services	Name	Click to display the task data page for this task.
	Entitlement	Indication of whether or not the service requires authorization.
	Status	Current status for the service request.
	Standard Duration	Calculated duration for the service request, based of the service agreement.
	Quantity	Number of requests of this particular service associated with this requisition.

	Unit Cost	Cost for the service.
	Subtotal	Calculated cost of service based on quantity purchased.

Assigning a Flag to a Task

You can assign flags of different colors to a task The flag appears next to the requisition in the Data Pane, and can be a means of highlighting tasks requiring varying degrees of attention or follow-up.
To add a custom flag to a task:

Step 1 Open a task for which you wish to associate a flag. See Opening a Task.

Step 2 Click **Task Details**.

Step 3 Choose the desired flag color from the Follow Up box.
Note • Clear Task removes the flag from the task.

• You cannot change a red flag that represents a late task (past the due date).

Step 4 Click **Close** to close the Task Details page.

Step 5 Click **Refresh** or **Open** the task to see the change.

The task list displays the flag and the Task Data page displays the chosen flag next to the due on information.

Viewing and Editing Task Data

Task Data displays order form information provided by the customer, as well as editable fields for service performers to enter task based data.

Step 1 Check out and open the task you wish to enter task based data. See Checking Out Work and Opening a Task.

Step 2 Click **Task Data**.
The Task Data page contains the following fields:
Task Data Details

Task Details	Name	Name of the task.
	Due On	Calculated due date for the task, based on the service level agreement. See Understanding Due Dates.
Service Information	Requisition Number	Requisition number associated with the task.

	Customer	Click to display customer information.
	Quantity	The number of units.
	Price Per Unit	Price for the service.
	Status	Current status of the service.
	Due On	Calculated due date for the entire service.
	Standard Duration	Calculated duration for the service, based on the accumulation of all tasks associated with the service.
	Total Price	Total cost based on the quantity of the service requested.

Other fields that display depend on the task, and are relevant to completion of the task.

Step 3   Enter any additional information requested for the particular task.

Step 4   Once you enter necessary information, click **Update** to save your changes.

Otherwise, click **Reset** to reset to the default values. You can now re-enter your data.

Note   You must click **Update** before navigating away from this page in order to save entered information. If you navigate to another page without clicking **Update** first, changes will not be saved.

Completing Checklist Items

Checklist allows you to view and mark off task activities, if any, within a task. If a checklist has been configured for the task, and made mandatory, you must mark all complete before you can mark the task as complete. To view and mark off checklist items:

Step 1   Check out and open the task. See Checking Out Work and Opening a Task.

Step 2   Click **Checklist**.

Step 3   Check the check box next to a step to mark the item as complete. To mark all items complete, click **Check All**.

Step 4   Once you check all completed steps, click **Update Checklist** to save your changes.

Note   You must click **Update Checklist** before navigating away from this page in order to save your changes. If you navigate to another page without clicking **Update Checklist** first, changes will not be saved. If the checklist has been configured as Required for this service, the **Done** button will not be enabled until all Checklist items have been checked.

Viewing and Editing Delivery Process

Delivery Process displays detailed information about each task in the delivery process. For more information on delivery process, see Delivery Process.To view all tasks in the delivery process:

Step 1 Check out and open the task. See Checking Out Work and Opening a Task.

Step 2 Click **Delivery Process**.
The Delivery Process page contains the following:

Task Details	Name	Name of the service task.
	Due On	Calculated due date for the particular task. See Understanding Due Dates.
Delivery Process	Tasks	Click the task name to display Task Data information.
	Status	Current task status.
	Start Date	Actual start date and time of the task.
	Due Date	Calculated due date for the task, based on the service agreement.
	Completed Date	Actual completion date.
	Performer	User or queue assigned to completing the task.
	Supervisor	Manager for the particular task. This manager is assigned within Service Designer.
	Show Skipped Tasks	Click to show skipped tasks.
	Do Not Show Skipped Tasks	Click to hide skipped tasks.

The tasks are listed within the delivery process in chronological order.

Step 3 To view a task within the delivery process, click the task name.

Note If you have permission to perform the task, the necessary Using the Action Buttons are displayed allowing you to check out and perform the task. If you do not have permission, you can only view the task information. No action buttons is displayed.

Adding Comments to a Task

You can add comments and additional information regarding a task in the Comments and History section. Once added, your comment can be viewed by all users with access to the task, including the customer.

To add a comment to a task:

Step 1	Check out and open the task. See Checking Out Work and Opening a Task.
Step 2	Click **Comments and History**.
Step 3	In the Add Comment field, type your comment.
Step 4	Click **Add**. Your comment displays in the User Comments section.

Viewing Comments and History

Comments and History displays all comments entered by any user, as well as a history, or log, of system events for the particular task.

To view comments and system history:

Step 1	Check out and open the task. See Checking Out Work and Opening a Task.
Step 2	Click **Comments and History**. All the comments and history of the task is displayed.

Adding Attachments to a Task

You can add additional or supporting documentation to a task. Once added, attachments can be viewed by all users with access to the task.

To add an attachment to a task:

Step 1	Check out and open the task. See Checking Out Work and Opening a Task.
Step 2	Click **Attachments**.
Step 3	Click **Browse** to search for the attachment you wish to assign to the task, and then click **Open**.
Step 4	Click **Add**. Attachments added to tasks are governed by the Prime Service Catalog Site Administrator, who may set size limits and exclude certain file types.

Viewing and Editing Attachments

Attachments allow you to view and attach additional or supplemental documents to a task.

To view attachments:

Step 1   Check out and open the task. See Checking Out Work and Opening a Task.

Step 2   Click **Attachments**.

Step 3   Under **Attachments**, click the file name of the attachment you wish to view.

Deleting Attachments

You can disassociate any attachments assigned to a task by using the Attachments section of the task. To delete an attachment from a task:

Step 1   Check out and open the task. See Checking Out Work and Opening a Task.

Step 2   Click **Attachments**.

Step 3   Check the check box next to the attachments you wish to delete from the task.

Step 4   To select all attachments, click **Select All**.

Step 5   Click **Remove Selected**.

Step 6   Click **OK**.

Viewing and Creating Ad-Hoc Tasks

Ad-hoc Tasks allows you to create an impromptu task not currently in the delivery process. You can specify if the new task can be completed concurrently with the current task, or if the delivery process must be placed on hold until the ad-hoc task is completed.

Ad-hoc tasks do not change the due date for the task, or for the entire service. In addition, if Pause is not chosen, then all ad-hoc tasks that are not completed by the time the delivery plan is completed are automatically cancelled.

To view ad-hoc tasks:

1   Check out and/or open the task. See Checking Out Work and Opening a Task.

2   Click **Ad-Hoc Tasks**.

The Ad-Hoc page displays any current ad-hoc tasks previously created.

To create an ad-hoc task:

Step 1   Open the checked-out task, and click **Ad-Hoc Tasks**.

Step 2   Under New Ad-Hoc Task, enter the following information:
Ad-hoc Task Information

Subject	Type a title for the ad-hoc task. The default entry is <RE: *task name*>.
Performer	Click **Search** to search for and assign a performer or queue to the ad-hoc task.
Expected Duration (hours)	Type the number of hours for task completion.
Instructions	Type any description instructions for the ad-hoc task.
Pause current task until this ad-hoc task completes	Check the check box if you must complete the ad-hoc task prior to completing the current task.

Fields marked with an asterisk (*) are required.

Step 3   Click **Start Ad-Hoc Task**.
The Ad-hoc task you just created displays in the Ad-Hoc Tasks section under the current task. The following information is provided:
Ad-hoc Task Details

Subject	Name of the task.
Status	Current status of the task. If the current task was paused, the status becomes ongoing (waiting) until the ad-hoc task is complete.
Due On	Calculated due date for the task. See Understanding Due Dates.
Performer	Assigned service performer or queue.

Using Site Administration settings and creating Email templates for Ad-Hoc tasks, you can allow for automatic notification, including task details and instructions to be sent to the Ad-Hoc task performer.

Tracking Work Effort

If configured for the task, Service Manager allows performers to log billable hours, information for work effort, and the cost for the work effort. This extra cost is above the cost of the service which is billed to the business unit.

To enter work effort:

Step 1   Check out and/or open the task. See Checking Out Work and Opening a Task.

Step 2   Click **Effort**.

Step 3   Under Add a New Task Effort Entry, enter the following information:
Task Effort Details

Category	Type of charge used for billing purposes. Choose **Labor**, **Materials**, or **Other** from the drop-down menu.

Unit Type	Type of units, for example hours. Choose from the drop-down menu.
Quantity	Number of designated units, for example number of hours.
Date	Automatically generated date, displaying current date.
Unit Cost	Cost per unit; for example cost per hour.
Total Cost	Automatically generated cost based on quantity times unit cost.
Description	Any text describing the work effort.

Fields marked with an asterisk (*) are required.

Step 4   Click **Add**.
Multiple entries may be made, documenting the efforts of multiple individuals in completion of the task.

Viewing Task Instructions

If configured for the task, task instructions displays any additional instructions for the task.

To view task instructions:

Step 1   Check out and/or open the task. See Checking Out Work and Opening a Task.

Step 2   Click **Task Instructions**.
The Task Instructions page contains the following:
Task Instruction Details

Task Details	Name	Name of the task
	Due On	Calculated due date for the particular task. See Understanding Due Dates.
Instructional Details	Instruction	Additional instructions for the task
	Instruction URL	URL leading to further instructions, if any
	Instruction URL Description	Description of Instruction URL

Checking In Incomplete Work

If, after checking out a task, you decide that you will not complete the task, you can return the task to the Available Work queue for other performers to check out and complete.

To check in incomplete work:

Step 1   Open the checked-out task. See Opening a Task.

Step 2   Click **Check In**.

Completing Work

Performing work consists of opening a task, checking it out, executing the work while entering necessary task data within Service Manager, and then submitting the task as done.

> **Note**   If you attempt to click **Done** before completing all steps, you will receive error messages listing the steps still required for completion.

To label a task as done:

Step 1   Open your checked out task. See Checking Out Work and Opening a Task.

Step 2   Verify that all necessary steps and information are complete for the task. You may need to check each of the following:

- Task details, see Viewing Task Details

- Task data, see Viewing and Editing Task Data

- Checklist, see Completing Checklist Items

- Delivery process, see Delivery Process

- Comments and history, see Adding Comments to a Task

- Attachments, see Adding Attachments to a Task

- Ad-Hoc tasks, see Viewing and Creating Ad-Hoc Tasks

- Effort, see Tracking Work Effort

- Task instructions, see Viewing Task Instructions

Step 3   Click **Done**.

Step 4   If you receive an error message, follow the instructions in the message to complete the necessary step.
If you receive no error messages, then you have successfully submitted the task as completed.

Printing Tasks

To print one or several tasks:

Step 1 In the Service Manager page, check the check box next to the task you wish to print.
You can print multiple tasks by checking multiple boxes.

Step 2 Choose the desired print style from the **More Actions** drop-down menu.
The following table depicts what information is provided for each print option:

	Full	Detailed	Compact	Data Only	Comments Only	Instructions Only
Task Details	✓	✓	✓	✓	✓	✓
Task Information	✓	✓	✓	✓	✓	✓
Requisition Information	✓	✓	✓	✓	✓	✓
Comments and History	✓	✓	✓		✓	
Service Information	✓	✓	✓	✓		
Task Data	✓	✓	✓	✓		
Delivery Process	✓					
Task Instructions	✓	✓				✓
Checklist Information	✓	✓				✓

The Service Manager Print window displaying the chosen tasks formatted for printing.

Step 3 On the browser **File** menu, click **Print**.
Note When the mode is set to Full, Detailed, Compact, or Data Only, a grid on a service form will also be printed. However, the grid will be resized to fit the current fixed page size. Grid column widths will be proportionately increased or decreased, and the row height will vary to fit the contents of the cell.

Using My Calendar

My Calendar tracks all ongoing tasks assigned to you that are not late. From My Calendar, you can export tasks to Microsoft Outlook. The tasks are exported as Calendar files. Once exported, you can open, add

information, and save the appointment to your Outlook Calendar. To view your assigned tasks using My Calendar, On the navigation bar, click **My Calendar**.

To export tasks to Microsoft Outlook:

Step 1 Under My Calendar, click the radio button next to the tasks you wish to export to Outlook.

Step 2 Click **Export To Outlook**.

Step 3 Click **Open** to view the task as an Outlook appointment.
The appointment displays the calculated start and end dates and times for the task.

Step 4 Add any necessary information to the appointment.

Step 5 Click **Save** and **Close** to save the appointment to your Outlook calendar.

Managing Work

There are several manager types that have an impact on Service Manager, each having different responsibilities.

Manager Roles and Responsibility

Role	Responsibility
Project Manager	Able to use the Monitor task to assign and reassign work, cancel the entire plan, or label a plan as complete.
Service Team Manager	Able to assign and reassign tasks, and reschedule work.
Task Supervisor	Able to cancel tasks assigned for management. This is an optional role that can be enabled.
Queue Manager	Able to view a list of queues on the Navigation Pane for which the manager is responsible.

Managing Authorizations and Reviews

Authorizing Tasks

Authorization tasks are those that require the assigned authorizer to allow a service request or product to move forward. Lack of authorization stops the delivery process. To approve or reject an authorization task:

Step 1 Open the task assigned to you for authorization. See Opening a Task.

Step 2 Review task information.

Step 3 Click **Approve** or **Reject** as appropriate.

Reviewing Tasks

Review tasks are those that require the performer to review and approve a step in the delivery process. Until the performer approves the step, the delivery process is placed on hold. To review a task:

Step 1 Open the task assigned to you for authorization. See Opening a Task.

Step 2 Review the task information provided.

Step 3 Click **OK** to acknowledge that your review is complete.

Managing a Project

A Project Manager is a person, position, or queue that is in charge of monitoring all tasks for a service. When a service is ordered, a Monitor task is created that runs concurrently with the delivery process. The title of Project Manager is assigned to whoever is given the Monitor task, even if the task is reassigned to another person. In this case, the new person becomes the Project Manager.

The Monitor task allows Project Managers to access all tasks associated with the service. Project Managers can then assign and reassign performers to each task, reschedule tasks, and complete or cancel the delivery plan.

Assigning Staffing

Project Managers can assign certain service performers or queues to a particular task within the delivery plan of the service. To do this, Project Managers use the Staffing page of the Monitor task.

To assign/reassign staffing to a task:

Step 1 Open the monitor task for the service. See Opening a Task.

Step 2 Click **Staffing**.

Step 3 Under Staffing, next to the task you wish to assign or reassign a staff member, click **Search**.

Step 4 In the "Search for" field, enter search criteria, and click **Search** to display your search results.

Step 5 Under Search Results, next to the staff member to whom you wish to assign the task, click the radio button.

Step 6 Click **OK**.
You return to Staffing with the new staff member assigned to the task.

Step 7 Repeat steps 3 through 6 for all other tasks for which you wish to assign or reassign a staff member.

Completing a Plan

As part of the Monitor task, a Project Manager can declare a delivery plan complete, independent of whether all tasks were completed within Service Manager.

To mark a delivery plan as complete:

Step 1 Open the monitor task for the service. See Opening a Task.

Step 2 Click **Done**.

Cancelling a Plan

As a Project Manager, you have the ability to cancel a delivery plan at any time during the delivery time line.

To cancel a delivery plan:

Step 1 Open the monitor task for the service. See Opening a Task.

Step 2 Click **Cancel**.

Managing Service Team

A Service Team Manager is a person, group, or organization unit that manages a particular service. When the particular service is ordered, this manager has access to all tasks associated with the service, assign and reassign staff members to a task, and reschedule work.

To perform all the tasks as a Service Team Manager you must be assigned Service Team Manager role within Organization Designer.

Locating Management Tasks

There are several locations a Service Team Manager can find a list of management tasks, depending on how and what is being searched, by using the different views offered to this role. Expand the following views on the Navigation Pane.

To search for Service Team Manager tasks:

Locate Management Tasks

Queues	Use the Queue view to search for a task with its queue, and reassign to other queues. **1** Click + to expand all queues. **2** Click the queue name to display a list of all tasks assigned to that queue.
Service Team	Use the Service Team view to search for performers within their service team, and reassign work to other performers. **1** Click + to expand service teams. **2** To view a list of all tasks assigned to a service team, click the service team name. **3** To view a list of all tasks assigned to a specific team member, expand the service team, and then click the team member name.

Assigning Work

If you are a Service Team Manager, you can assign and reassign tasks to Service Team members.

To assign or reassign a task:

Step 1 Locate the tasks you wish to assign or re-assign.

Step 2 Check the check box next to the tasks.

Step 3 In the appropriate view (Queue or Service Team), locate the desired performer and click the radio button.

Step 4 Click **Assign**.

Rescheduling Work

Service Managers can reschedule work tasks to a different date than the generated date.

To reschedule work tasks:

Step 1 Locate the tasks you wish to reschedule.

Step 2 In the Data Pane, check the check box next to the task you wish to open, and then click **Open**.

Step 3 Click **Reschedule**.

Step 4 To assign a specific date, click the **Set to this date and time** option, and then enter the date and time.

The format should be consistent with the existing date and time. You can click the calendar icon to choose a date and time.

Step 5   To assign a calculated date after a certain time, click the **Compute earliest starting date after** option, and then enter the date and time using the format provided.
The format should be consistent with the existing date and time. You can click the calendar icon to choose a date and time.

Step 6   To reset the duration, type the number of hours in the New Duration field.

Step 7   Click **Set Time**.