SERVICE PORTFOLIO MANAGEMENT

Management of the Service Portfolio in Xpert.NET

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1 Introduction

1.1 Purpose of the Document

Xpert.NET is a very dynamic help desk solution that can be configured in nearly every direction. Daily routine and experience have shown that, while most administrators familiarize themselves with the most important modules and configurations after some time, many questions remain unanswered and much potential unused, due to a lack of knowledge.

This document is supposed to help you with the orientation in the *Service Portfolio* module. For this purpose, it will describe the configuration as well as its integration into the entire *Xpert.NET* system step by step.

1.2 Addressees of the Document

This document mainly addresses administrators of *Xpert.NET*.

Nevertheless, end users may also find helpful advice on handling the module here. As an administrator, you can compile a slim document for your end users by leaving out passages only necessary for the administration of the module. We have, however, smaller, slimmer documents for users and members of support available.

1.3 Remarks on the Content of this Document

In this document, all kinds of functions of the *Service Portfolio* module will be named and described. The functional range can, however, fluctuate due to configuration, licensing, and versioning. If you miss certain functions listed in this document in your *Xpert.NET* installation, please contact our support directly.

1.4 About the Service Portfolio

The Service Portfolio provides the basis for establishing an effective and strategic Service Management in compliance with ITIL v3. The Service Portfolio is used to represent externally and internally provided services of an organization in a portfolio as a whole, based on the Ticket Management.

Individually definable service catalogs allow for consolidating several services, service transactions and service categories. A proper, individually definable and manageable life cycle can be assigned to each object within the Service Portfolio.

The service and the process are defined by using schemas, which is comparable to the approach for tickets. A service schema is used to define dynamic fields that are passed on to a service. During ticket creation configuration items (CIs) are then available as linkable objects via a transaction.

A service level package is used to deposit service level agreements (SLAs) as well as coverage, priority and escalation with the services for tickets to be created.

Furthermore, it is possible to define process roles for a process schema, which is a ticket schema that is adapted to the service portfolio. Within ITIL roles are used to define responsibilities, e. g. the Service Delivery Unit Manager (SDU Manager). Process roles contain tasks that can be disposed to several groups and users within the process schema.

Each service transaction is linked to exactly one process schema. A process schema can be assigned to several service transactions in turn.

The different service catalogs as well as their components are displayed well-arranged in a hierarchy. Several filter functions allow for selecting existing service catalogs and the elements contained in them, e. g. by means of parts of the name.

The Service Portfolio establishes a connection between process management and IT service management (ITSM) regarding a comprehensive business service management (BSM).

This documentation illustrates the configuration of life cycles for meeting all requirements for the different phases of planning and implementing various portfolio elements in CHAPTER 2. Additionally, the configuration of the service schemas used for creating of prefabricated sets of information fields for your various services will be explained.

In CHAPTER 3 the differing configuration of the process schemas, which are the ticket schemas optimized for the Service Portfolio, and all the associated settings will be detailed.

In CHAPTER 4 the configuration, the display of the elements and the Service Portfolio interface will be explained.

2 Configurating the Service Portfolio

The basic configurations for the Service Portfolio can be made in the settings, where the statuses and life cycles of the individual portfolio elements are configured and where schemas for the later use in services can be created.

2.1 Life Cycles and Statuses

The life cycle configuration of the Service Portfolio can be found under *SETTINGS → SERVICE PORTFOLIO → SERVICE PORTFOLIO*.

By clicking the button *New life cycle* top right various life cycles for service catalogs, services, and service transactions can be created. Life cycles that are no longer required can be deleted via the *Actions* menu on the left.

PLEASE NOTE

An efficient Service Portfolio can only be achieved if at least one life cycle exists for each life cycle typ (service catalog, service and service transaction).

2.1.1 Creating Life Cycles

New life cycles are created by clicking *New life cycle*. Subsequently, a new dialogue window opens to enter all relevant information for the new life cycle. Until the first saving only the *Details* tab will be available to enter the following information:

Name: Defines the significant name of the life cycle. If multiple languages are activated in the system, a localized name can be entered.

Description: Provides a significant description for the life cycle.in all available languages here.

Type: Defines the designated life cycle type (*Service catalog*, *Service* or *Service transaction*).

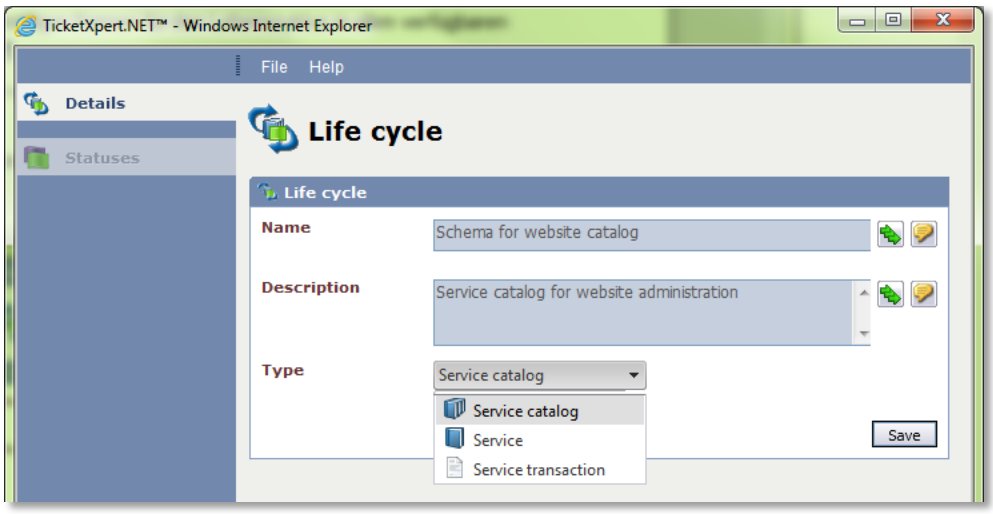

Figure 2-1 Creating a service life cycle

After a click on *Save*, the *Status* tab will be available to configure the various statuses of the life cycle. The first created status will become the start status automatically. Every service catalog, service, or service transaction this life cycle has been created for will begin with this status.

Moreover, the following settings can be made for the respective status in the corresponding dialogue window:

Details

Name: Defines the name of the status. If multiple languages are activated in the system, the name can be localized.

Description: Provides a significant description for the status in all available languages.

Icon: An icon can be selected for the status in order to facilitate the clarity. Either preset icons on the server can be used or own icons can be uploaded from the local computer.

Status type: There are three preset status types (*In operation*, *In pipeline* and *Archived*) a new status can be assigned to.

WARNING

In order to use a life cycle productively it is necessary to use each status type for the existing statuses.

Standard status: This check box will be disabled and checked automatically for the first status created. If another status of this type will be created, it can be defined as the default status for the selected type by checking the box.

PLEASE NOTE

The standard status will be needed for theautomatic inheritance of statuses.

WARNING

If a status is set as a standard status, it cannot be deleted. First another status has to be created or an existing one set as the standard status for the old standard status to be deleted.

Show icon in the stage: If this checkbox is activated, the previously selected icon will be displayed on the homepage of the Service Portfolio for every element in this status.

Start status: If this checkbox is activated, the current status will become the start status. If the status is the first one created, it will become the start status automatically. However, this can be changed as soon as further statuses have been be added.

After having entered all of the designated information, the status is created by clicking *Save*. Subsequently, the tab *Reachable Statuses* will become available. It can be ignored until all necessary statuses for the life cycle have been created. If all necessary statuses are created, they can be opened one after another and modified by switching to the *Reachable statuses* tab and by clicking on *New reachable status*.

Reachable statuses

In the dialogue window the following configuration options are available:

Reachable status: Defines a reachable status from the current life cycle.

Workflow: This workflow is triggered as soon as the status changes from the current status to the reachable status.

PLEASE NOTE

Service catalogs as well as services and service transactions require special workflows.

Automatic transition: If this checkbox is activated, status changes can be made automatically after a certain timespan. As soon as the checkbox is activated, this timespan can be entered directly below. If the timespan is surpassed, the status will be changed to the specified status automatically.

If a reachable status is not required anymore, it can be deleted in the *Actions* menu.

After the details and status dependencies have been defined for a life cycle, all further necessary life cycles can be created and configured for the Service Portfolio.

2.2 Service Schemas

Via a service schema, a prefabricated set of dynamic fields can be passed on to a service later on. If further information that exceeds the name, description and file attachments has to be entered for a service, this can enabled in a service schema.

Service schemas can be managed via *SETTINGS → SERVICE PORTFOLIO → SERVICE SCHEMAS*.

New service schemas are created by clicking on the respective button in the top right corner. In the subsequently appearing dialogue, the name and description for the schema can be entered.

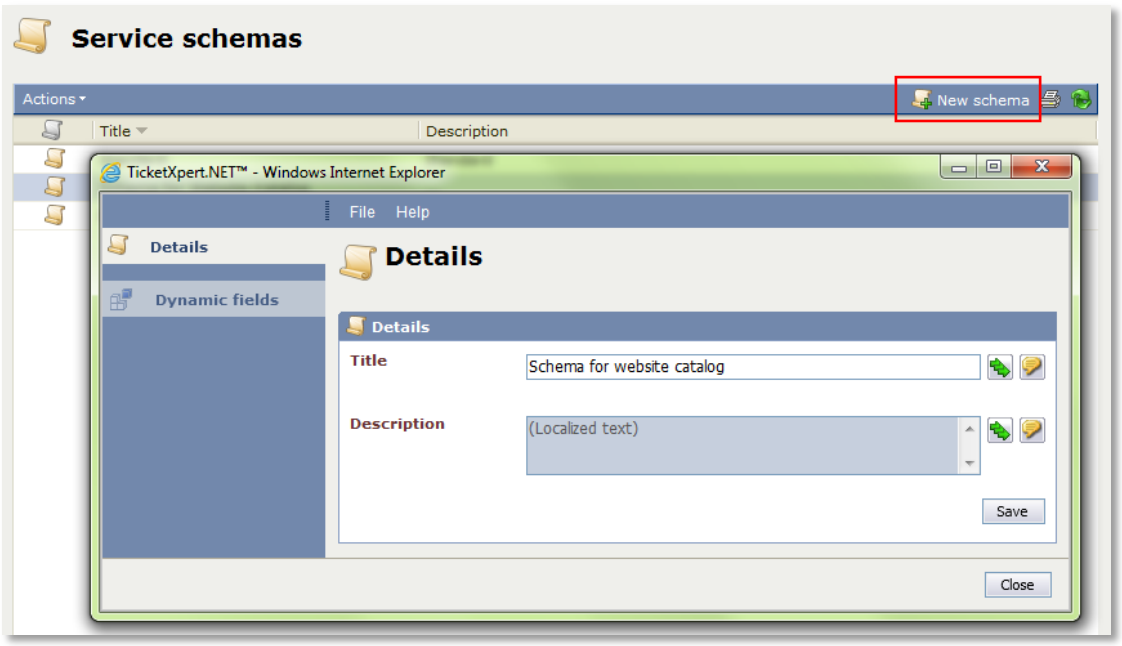

Figure 2-2 Creating a service schema

After saving the schema, the tab *Dynamic fields* will be available where any number of dynamic fields can be added. If the respective dynamic field is mandatory for each service that uses this schema, the checkbox *Required* needs to be activated..

After clicking on *Save* this schema can only be selected for every recently created service in the Service Portfolio.

PLEASE NOTE

When modifying the settings of a service, please not that changing the service schema in a service is not possible anymore.

3 Configurating Process Schemas

Generally, a process schema is structured alike a ticket schema. However, there are some specific features in the configuration. Only these differing configuration steps will be illustrated in this chapter.

3.1 Creating a Process Schema

In contrast to the ticket schema configuration, where a ticket number range and a status need to be created before creating a ticket schema, the process schema needs to be created at first stage. As usual, this is effected under *SETTINGS → TICKET MANAGEMENT → TICKET SCHEMAS* by clicking on *New ticket schema*. If the Service Portfolio is activated, the option *Is process schema* is activated by default and the respective schema only needs to be saved after the **Name, Description** and **Title field label** have been entered.

Process schemas need a number range and status as well. However, these can only be determined after saving the process schema.

The option **Allow global dependencies** is also available only after saving the process schema. If this option is activated, global number ranges and statuses can be used.

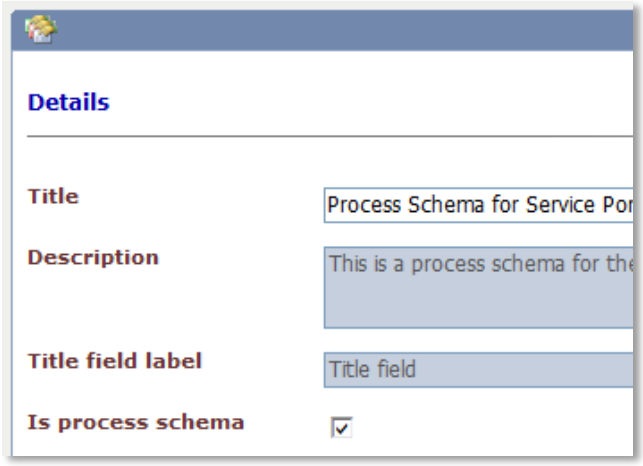

Figure 3-1 Creating a process schema

PLEASE NOTE

Please note that the option *Is process schema* cannot be modified after having saved the settings.

3.1.1 Process Roles

Process roles are defined for process schemas. Process roles are sets of tasks, which can be assigned to various groups and users within a process schema.

In contrast to ticket schemas, no groups can be selected during the configuration of ticket actions. Besides various users, like *Creator* or *Owner*, it is possible to make process roles perform an action in a certain status.

Process roles are created by clicking *New process role* in the top left corner. The following information needs to be entered:

Name: The significant name of the process role.

Description: A detailed description of the process role.

Default group: A group from the User Management whose members shall use this role.

> **PLEASE NOTE**
>
> Every configuration for a process role in the process schema is a template. It is thus possible to overwrite the settings in the later configuration of the service transactions if necessary.

3.2 Assigning a Number Range

Next, a matching number range for tickets is needed (*SETTINGS → TICKET MANAGEMENT → TICKET NUMBER RANGES)*. In the top right corner the process schema filter can be found. The view provides an overview over either all ticket number ranges, global ticket number ranges, or ticket number ranges already assigned to the process schema. Global ticket number ranges can be identified easily even without the filter, as they are marked with a green check mark.

In the next step the desired process schema is to be selected from the list of the process schema filter. In the new overview it is possible to either add a global ticket number range to the schema via the *Actions* menu, or to create a new ticket number range as usual, only for this respective schema.

Figure 3-2 Assigning a ticket number range

Depending on the selected process schema filter, during the creation either a global numerical range or a numerical range for tickets only available for the respective process schema will be created.

3.3 Assigning a Status

As known from a ticket schema, it is necessary to assign various ticket statuses, which will be run through by a ticket created with a certain process schema. As known from the ticket number ranges, either globally defined statuses can be used, or a proper set of ticket statuses can be created for every process schema.

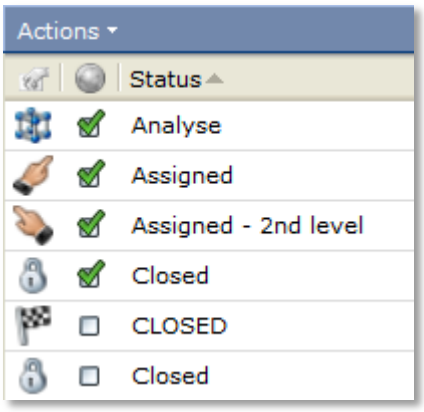

Figure 3-3 Assigning statuses

For the ticket statuses the process schema filter top right can be used to either display all statuses, global statuses, or statuses that have been assigned to the various process schemas.

WARNING

Please note that the filters for the number ranges and statuses need to be set correctly! If, for example, a status or ticket number range is created without setting the designated process schema in the filter first, it is not possible to use them in the process schema.

3.4 Workflows

In the next step the corresponding workflows for the process schema need to be created under *SETTINGS → WORKFLOW MANAGEMENT → WORKFLOW MANAGEMENT*. The process schema filter is located top right. If the desired process schema is selected in the filter, a new workflow can be created for this purpose by clicking *New workflow*, whereupon the name and description are required before the settings can be saved by clicking *OK.* Configuring the new workflow is effected as known from a general ticket schema or as described in the WORKFLOW MANAGEMENT documentation.

WARNING

In case of plug-ins, which change the status of a ticket, it is necessary to use only the statuses that have been created for the process schema!

3.5 Use

If the designated ticket number range, the ticket status and the workflows have been created as desired, they can be added to the process schema. Now, actions can be added to the schema as well, whereupon only statuses are available that have been added to the schema as global statuses or that have been created for the schema specifically.

4 The Service Portfolio

The actual Service Portfolio can be found in the side bar under *Services*.

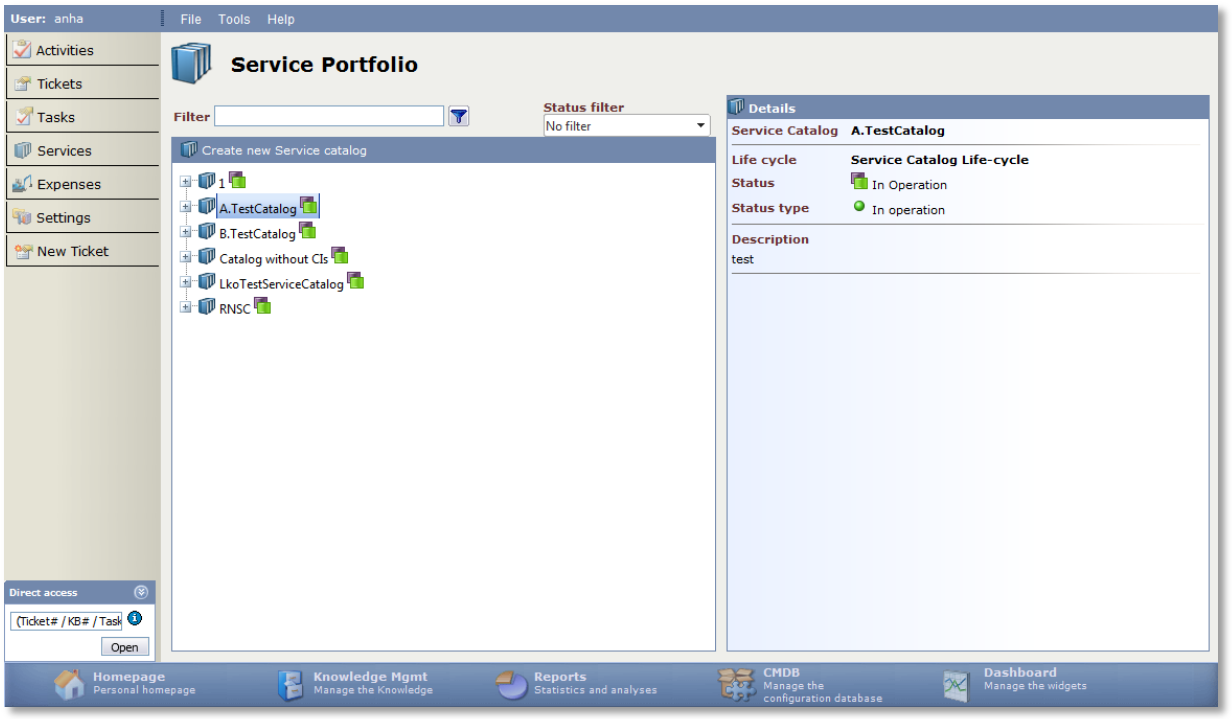

Figure 4-1 The Service Portfolio

4.1 View

There are several service catalogs in the Service Portfolio stage containing the following elements: service, service category and service transaction. Furthermore, it is possible to use the filter for searching for these elements. The search options are explained in the *SEARCH AND FILTER* documentation.

Below the filter the actual Service Portfolio can be found. In this tree view all created elements are displayed in an overview.

Illustration of the various icons:

This is a service catalog. These catalogs can contain multiple services and service transactions as well as service categories, which are pooled into a “catalog”.

This is an icon for a service. In services, service transactions as well as service categories can be pooled.

This is a service category. Service categories can be used for a further subdivision of service catalogs or services. They are only used as folders. Only service categories can be created arbitrarily below catalogs or services.

This is a service transaction. Every service transaction is only linked to one process schema. In contrast, a process schema can be linked to several service transactions. Tickets can be created from service transactions.

The right side shows the detail array, where information on the elements selected in the service tree is displayed. If, for example, a service transaction has been selected, information on the superordinate elements is displayed as well as various status information and the configuration items (CIs) linked to the transaction.

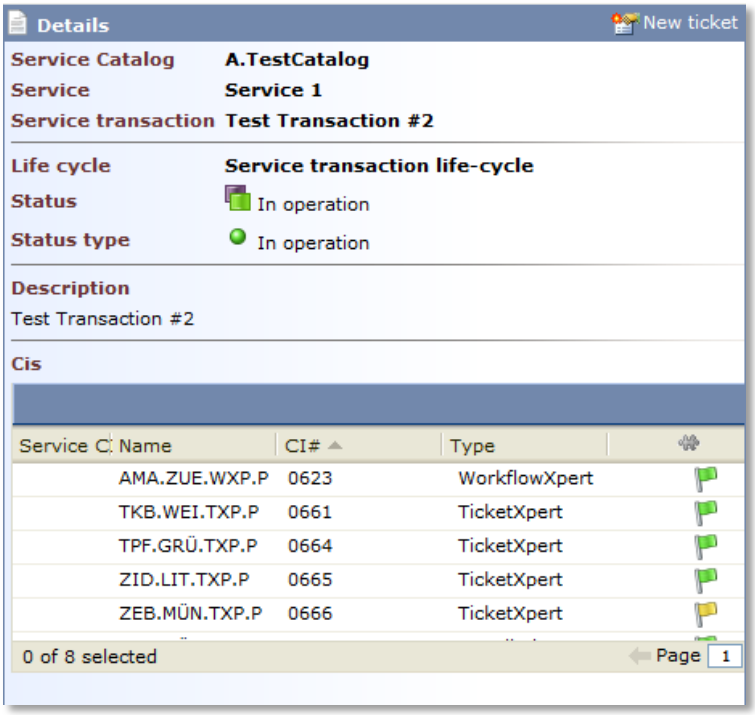

Figure 4-2 The detail view of the Service Portfolio

Directly above the detail array the button *New ticket* is displayed as soon as a service transaction has been selected in the service tree.

4.2 Configuration

For a correctly configurable Service Portfolio it is required that all necessary life cycles, service schemas and process schemas with the associated settings have been completely configured. Moreover, all necessary authorizations have to be assigned to the configuring user in the User Management (see: USER MANAGEMENT documentation)..

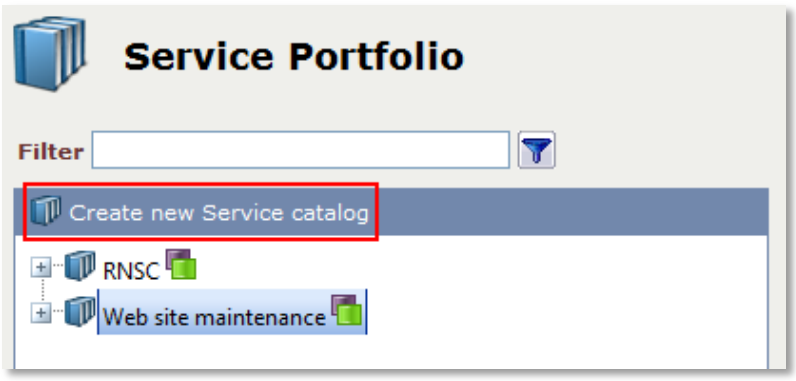

Figure 4-3 Creating a service catalog

4.2.1 Service Catalogs

Service catalogs are created by clicking the button *Create new service catalog* above the services tree. Existing catalogs can be opened via the context menu or by double-clicking the catalog.

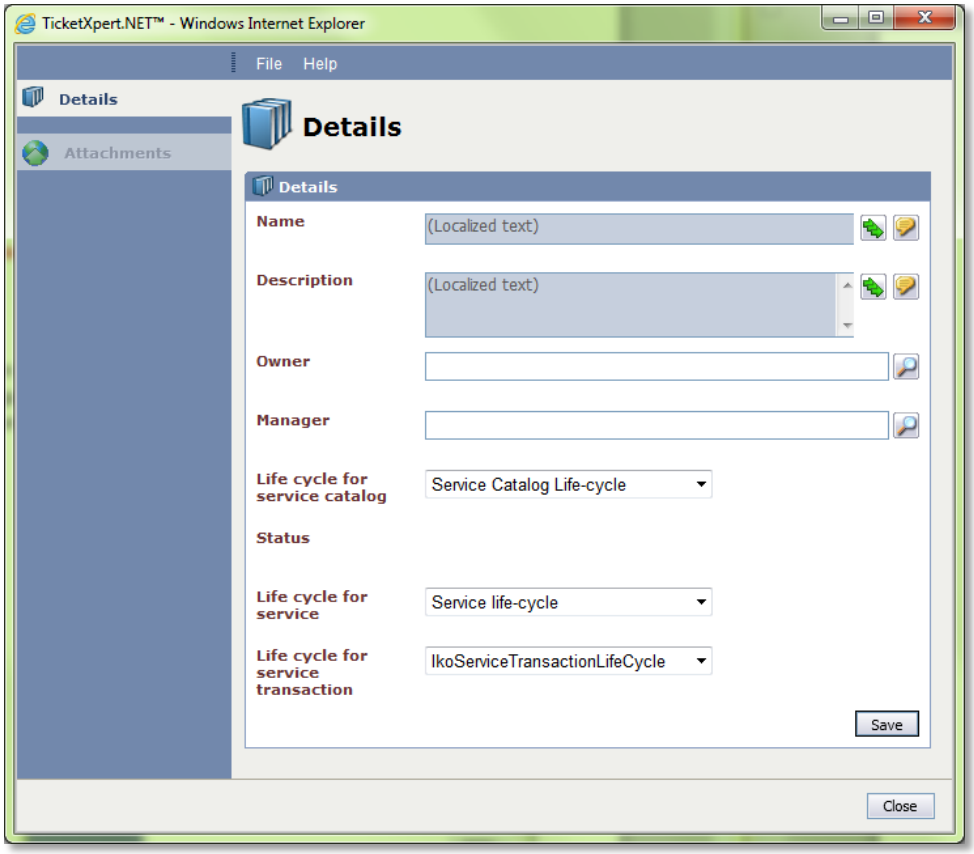

Figure 4-4 Creating a service catalog

In the subsequently opening dialogue, only the tab *Details* will be active until the first saving. In this dialog, several information and settings for the service catalog can be configured:

Name: Defines the name of the catalog. If multiple languages are activated on the system, an individual name can be entered for every language available via the respective buttons.

Description: Defines the description for the catalog. An individual description can be entered for every active language here as well.

Owner: The catalog owner is technically responsible for the catalog. The owner role can basically be perceived by a user or user group.

Manager: The manager of a catalog is responsible for implementation as regards content and for maintenance of the catalog. The manager role can basically be perceived by a user or user group.

Life cycle for: Defines the life cycles for all subordinate elements are configured:

- **Service catalog**: This is the life cycle for the current service catalog
- **Service**: Defines the life cycle that is used for all subordinate services.
- **Service transaction**: Defines the life cycle that is used for all subordinate service transactions.

The life cycles set here will apply to all services and service transactions created below the catalog. For this reason, they cannot be changed after saving.

The tab for file attachments will be available after clicking *Save* to upload a specific file attachment for the catalog.

Moreover, the **status** of the service catalog can be changed, if necessary.

If the catalog is entirely configured, an arbitrary amount of services or service categories can be created within the catalog. For this purpose, right-clicking on the catalog opens the context menu. Within a service catalog the entries for service categories and creating services are available.

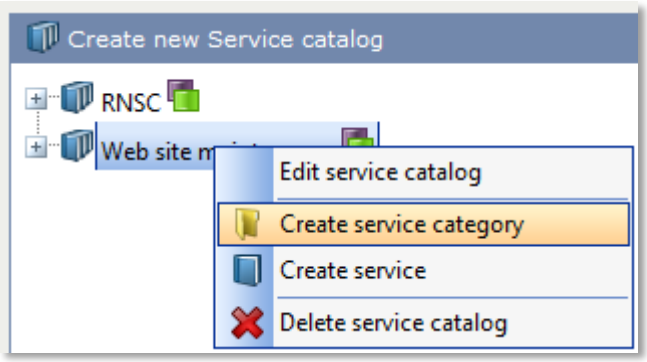

Figure 4-5 Creating a service category

4.2.2 Service Categories

Service categories can be created everywhere within the hierarchy below a catalog. As they only have a folder function for a further subdivision of services and service transactions, only a name and description need to be entered.

4.2.3 Services

Services are created within service catalogs, service categories or services. Click right to open the context menu and select the option *Create service* or open the configuration dialog for a service by double-clicking on it. In dialog, the following information can be set for the service:

Details

The *Details* tab, where general information for the service can be set, will be the only one available until the first saving.

Name: Defines the name of the service. If multiple languages have been activated on the system, the localization buttons can be used to enter the name in all available languages.

Description: Defines a description for the service. The description can be entered for every activated language as well.

SDU Manager: Defines the Service Delivery Unit Manager. This group of persons manages and coordinates all phases of a service and is responsible for all the processes dealing with this service. This role can only be assigned to a group.

Manager: The service manager is responsible for implementation as regards content and maintains the service. The manager role can only be perceived by a group of users.

The owner and the manager can basically be in the same group. In a large portfolio it is advisable to assign these roles to different persons or groups.

Schema: Defines the service schema of the respective service. The dynamic fields contained are shown in the *Fields* tab.

PLEASE NOTE

The service schema can not be modified afterwards.

Status: Defines the status the service will obtain as soon as it is created is displayed. Possible statuses and status transitions are defined via life cycles.

Inherit status changes: If this checkbox is activated, all status changes of a superordinate service or service catalog will be passed on to the service automatically.

Start date/status: Irrespective of the status inheritance, a start date with a time along with the necessary status can be entered here. When this date has been reached, the service will be set to this status automatically.

End date/status: Defines an end date and the corresponding status. When this date has been reached, the service will be set to the selected end status automatically.

After having entered all of the necessary information, clicking *Save* creates the service. Subsequently, the remaining tabs in the side bar on the left will be available.

Fields

All dynamic fields defined in the service schema are displayed in this tab can be edited suitable to the respective service.

CMDB

On this tab, various CIs, CI schemas or types can be linked to the service and be displayed in a table. The CI that is linked to the respective service as a service CI is additionally marked in the table.These CIs will be available later on as linkable objects during ticket creation via a transaction located below the service.

SLP

The tab for Service Level Packages (SLP) allows for defining service level agreements that applies to tickets that have been created from service transactions that have been created below these services.

Additionally, the OLA settings Time span and Service times can be overwritten for the task schema. This only applies to tasks that have been created from tickets that are based on a subordinate service transaction.

PLEASE NOTE

The contracts need to be entirely configured within the Service Level Management.

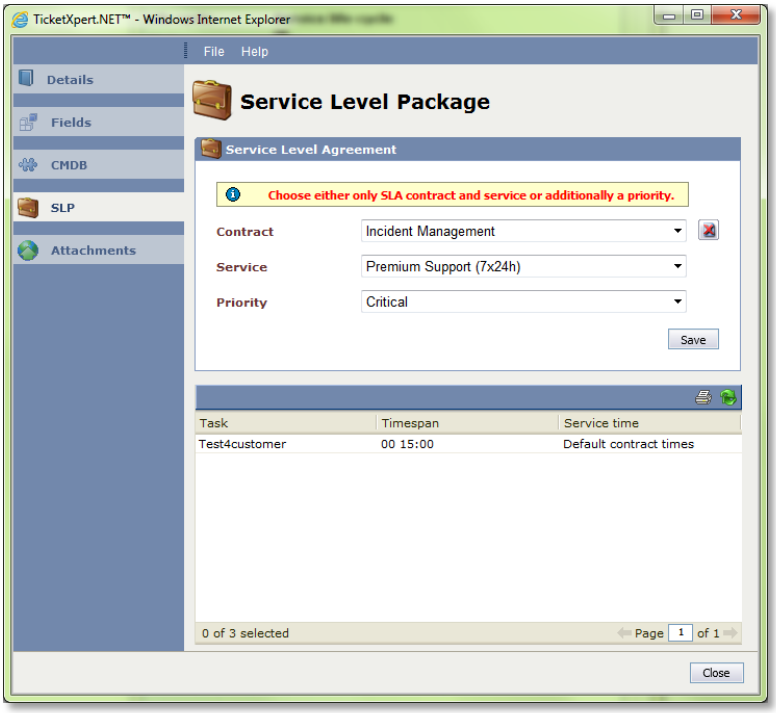

Figure 4-6 Configuring a service level package

Attachments

This tab allows for uploading and managing file attachments that are needed for the service, like important information or contracts.

4.2.4 Service Transactions

Below the services, no matter if they have been subdivided by other services or service categories, service transactions can be created. If the desired object has been selected, the menu item *Create service transaction* can be selected in the context menu. Existing service transactions can be opened in the context menu or by double-clicking on them.

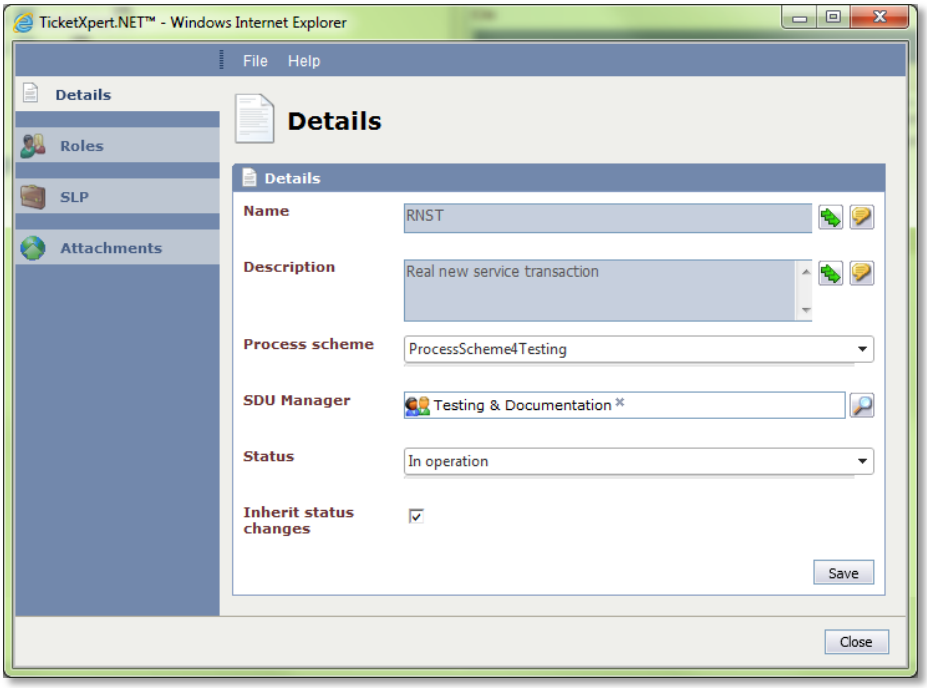

Figure 4-7 Creating a service transaction

Details

The *Details* tab is the only tab available until the first saving. It allows for defining general information for the service transaction.

Name: Defines the name of the service transaction. If multiple languages have been activated on your system, the name can be entered in all available languages.

Description: Defines a description for the service transaction. A customized description can be entered for every active language as well.

Process schema: Defines a process schema for the Service Portfolio that will be the basis for tickets, which are created in this transaction.

SDU Manager: This group of persons is responsible for all the processes dealing with this service transaction.

Status: The current status of the service transaction is displayed here. After saving, the status can be adjusted.

Inherit status changes: If this checkbox is activated, all status changes of a superordinate service will be passed on to the service transaction automatically.

Roles

Role assignments, as created previously as a template in the process schema, can be adjusted and overwritten in the *Actions* menu.

SLP

Service level agreements can also be set for service transactions. These SLAs are valid for tickets that have been created in this service transaction. By default, the settings for the superordinate services are applied.

> **PLEASE NOTE**
>
> The contracts need to be entirely configured in the Service Level Management.

Additionally, the OLA settings Time span and Service times can be overwritten for the task schema. This only applies to tasks that have been created from tickets that are based on a subordinate service transaction.

Attachments

File attachments especially required for this service transaction, like important information or transaction contracts, can be uploaded and managed in this tab.

4.2.5 Creating Service Objects from a Template

Existing service catalogs containing objects can be used as templates for new categories, services or service transactions. The elements configured in the initial object, like service, categories and transactions, can be taken over.

Click on the button *Create service catalog from template* (1) to copy an entire catalog or use the context menu (2) to create objects within a catalog from a template.

Figure 4-1 Creating a service catalog based on a template

The elements created from a template are created as copies of the initial element and have the status *In pipeline*. The can be customized afterwards.

> **WARNING**
>
> You can only copy objects having a parent object. Please note not to select a service category but an object in this category before creating a copy.

4.3 Creating Tickets via the Service Portfolio

Along with the creation of tickets as described in the TICKET MANAGEMENT (this is possible for tickets created from process schemas as well: By selecting the *Service Portfolio* as a ticket schema and then selecting the designated service transaction), tickets can be created via the Service Portfolio as well. For this purpose, simply click on the *New ticket* button after selecting the designated service transaction.

If a service transaction is selected in the services tree, the button *New ticket* is displayed in the detail area.

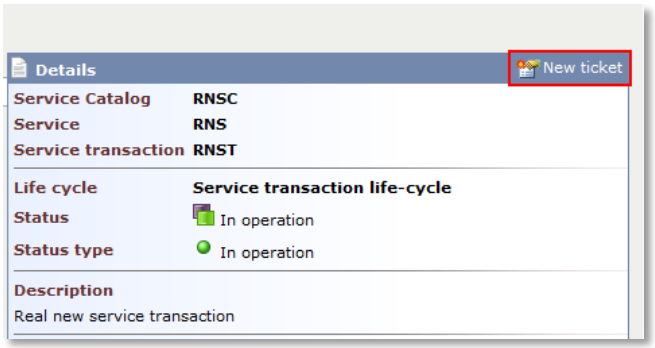

Figure 4-8 Creating a ticket in the Service Portfolio

In the subsequently opening dialogue, in contrast to normal ticket creation, a CI can be selected, which will be linked to the newly created ticket automatically and will then be available in the ticket via the *CMDB* tab. By clicking *Next*, just like during normal ticket creation the ticket wizard will appear to support in the rest of the ticket creation process.

5 Statistics and Change Management

5.1 Statistics

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Replaces version	3.2
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Valid until	Cancellation
Document name	Service Portfolio Management 3.9-1_EN

5.2 Change Management

VERSION	DATE	EXECUTED BY	COMMENTS
3.0	11.03.2011	Maik Wisatzke	Created
3.1	18.08.2011	Maik Wisatzke	Automatic transitions and service schema added
3.2	02.04.2012	Maik Wisatzke/ Steffi Kurnot	Added new images, Reference to Search and Filter documentation, Adjustments for 3.8, linguistic revision
3.9-1	18.01.2013	Maik Wisatzke/ Steffi Kurnot	Added search for Service Portfolio tree elements, added *Create from template*; Revision

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