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# **Vickie Hearne Writing Sample**



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# Module 1: Introduction to Peregrine Systems

## Introduction

In this module, you will learn about Peregrine Systems' business vision. You will also learn about infrastructure management and how ServiceCenter helps streamline business processes.

Finally, you will learn about each of the ServiceCenter components.

## Contents

This module contains the following lessons:

- ◆ Lesson 1: ServiceCenter



# Lesson 1: ServiceCenter

## Introduction

ServiceCenter integrates industry-standard best practices for service management with the best practices for enterprise implementation. The result is a solution that:

- ◆ Is designed to meet the needs of businesses without extensive customization
- ◆ Is scalable and tailored to accommodate unique business processes without costly development or maintenance
- ◆ Is able to meet the needs of centralized and globally distributed enterprises

In this lesson, you will learn about the architecture and benefits of the ServiceCenter solution. You will also learn about the different applications offered by ServiceCenter.

## Objectives

- ◆ Describe ServiceCenter.
- ◆ List the benefits of ServiceCenter.
- ◆ Identify the uses of each ServiceCenter application.



## What is ServiceCenter?

ServiceCenter is the global leader for the full lifecycle management of the Information Technology (IT) infrastructure. ServiceCenter provides proven service management workflow based on:

- ◆ Years of experience working with world-class IT practitioners
- ◆ Global standards for best practices, including the Information Technology Infrastructure Library (ITIL)

ServiceCenter employs a three-tier client/server architecture that allows for maximum flexibility and customization within a given networked environment.

ServiceCenter is capable of managing complex, distributed enterprise environments with support for popular client, server, and database platforms.

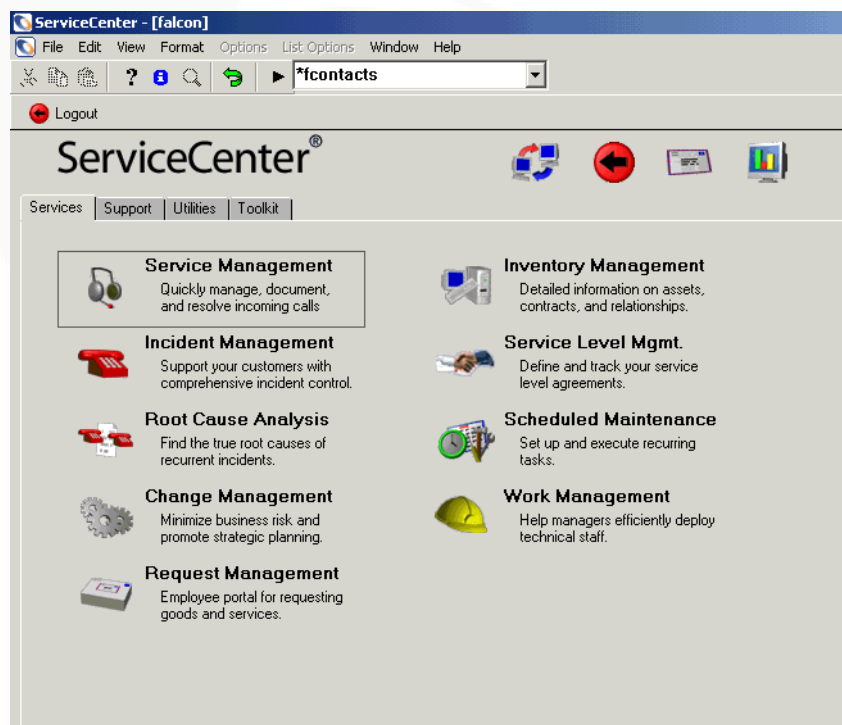


Figure 1-7 System Administrator's Main Menu

## Why ServiceCenter?

ServiceCenter is the ideal solution for traditional and e-business. It enables the implementation of IT service management practices that meet the needs of enterprises today, and into the future. ServiceCenter provides customers with a solution that grows with their businesses, permitting them to address



challenges before they impact their operations and take advantage of new opportunities as they arise.

ServiceCenter is extremely flexible and can be tailored to meet unique business requirements, including integration with many enterprise-wide systems such as:

- ◆ Enterprise Resource Planning (ERP)
- ◆ Customer Relationship Management (CRM)
- ◆ Network Systems Management (NSM)

ServiceCenter provides outstanding scalability and is capable of supporting diverse organizations ranging from a handful of analysts to hundreds or thousands of technicians and end users.

Business decision-makers and technical managers rely on ServiceCenter as the enterprise solution for organizations requiring out-of-the-box workflow with IT service management best practices, scalability, tailorable processes, and breadth of functionality.

ServiceCenter gives enterprises a competitive advantage through IT service management by:

- ◆ Minimizing operational risk
- ◆ Lowering the costs of doing business
- ◆ Making employees more productive

### **Benefits of ServiceCenter**

ServiceCenter helps organizations leverage their infrastructure to increase their competitiveness. ServiceCenter accomplishes this by offering the following benefits to customers:

- ◆ Proven processes
- ◆ Complete IT infrastructure management solution
- ◆ Minimized operations risk
- ◆ Controlled costs

#### **Proven Processes**

Built-in best practices and easily defined workflow mean less time spent implementing solutions and more time gathering business data for informed decision-making.



### **Complete IT Infrastructure Management Solution**

ServiceCenter is a broad and robust application set that provides the tools needed to manage operations today, and into the future.

### **Minimized Operations Risk**

ServiceCenter combines information with repeatable, measurable workflow and accurate data about the environment. Because of this, the risks associated with change are minimized and benefits are maximized.

### **Controlled Costs**

ServiceCenter helps clients understand the costs associated with IT service and take steps to lower them. ServiceCenter's management tools help control costs by empowering better decision-making and by effectively managing technical staff.

## *Who Uses ServiceCenter?*

ServiceCenter is intended for use by mid-size and large organizations including Fortune 500 companies. ServiceCenter is used by corporate clients such as Foxwoods Casino, and government clients such as the State of Florida Department of Children and Families. ServiceCenter helps all clients monitor and manage assets and the relationships of assets within their infrastructure. This optimizes productivity of the tangible assets and the productivity of the users.

## *Components of ServiceCenter*

ServiceCenter consists of several integrated modules that process data stored in a central repository. The ServiceCenter applications include:

Inventory Management	Service Level Management
Service Management	Work Management
Incident Management	Scheduled Maintenance
Root Cause Analysis	ReportCenter
Change Management	ServiceCenter Insight
Request Management	Knowledge Base
Contract Management	



### **Inventory Management**

Inventory Management (ICM) tracks asset data and provides detailed information about resources and their relationships to the other product applications. ICM enables faster incident resolution and control of infrastructure changes. It also allows you to create contracts, add assets (including software licenses) to those contracts, and manage contract and payment details.

### **Service Management**

Service Management (SM) is the starting point for all contacts with the service desk. SM is the repository for all information about a call, from the time the record is opened to the time the incident is resolved and the call is closed.

### **Incident Management**

Incident Management (IM) is used to open incident records when a call cannot be resolved immediately. When service is restored, the incident record is closed, along with related call records.

### **Root Cause Analysis**

Root Cause Analysis (RCA) is used to open root cause records that track the underlying issues causing reported incidents. Root cause records can describe temporary workaround solutions in a root cause state or before the root cause is known. Root cause records can be changed to known errors once the underlying issue is determined. When the underlying cause is corrected, the root cause or known error record is closed.

### **Change Management**

The Change Management (CM) application is used to process requests for change (RFC) records that may be the result of root cause analysis. CM tracks the risks and costs of making the change to the infrastructure, as well as the approval process for the change.

### **Request Management**

Request Management (RM) is used to manage product and service requests and approvals through a common, integrated employee portal. This enables the tracking of all IT infrastructure costs from initial request to acquisition and service.

### **Contract Management**

Contract Management is used to manage the costs associated with service level agreements, including contact information for each agreement and costs associated with each service activity.



### **Service Level Management**

Service Level Management (SLM) provides a centralized repository of SLM information. This module is used to measure the extent to which service providers meet service level agreements with their customers. Measurement is based on a range of variables, including response time and quality of service.

### **Work Management**

Work Management is used to efficiently and accurately allocate personnel to handle incident tickets. Work Management optimizes technician scheduling by comparing the skill set of each technician with the tasks required to resolve an incident ticket.

### **Scheduled Maintenance**

Scheduled Maintenance is used to define and schedule recurring maintenance tasks, with automatic generation of the appropriate incident, change, and request tickets.

### **ReportCenter**

ReportCenter is used for desktop reporting from ServiceCenter applications.

### **ServiceCenter Insight**

ServiceCenter Insight is used to create end-user reports with simple point-and-click functionality.

### **Knowledge Base**

Knowledge Base provides a central repository for employees to access key corporate information, report issues, request services, and perform searches and queries for incident resolution procedures for IT problems and other issues.

# Module 2: Data Retrieval

## Introduction

This module focuses on data retrieval within ServiceCenter. The main utilities that help you retrieve data are:

- ◆ Stored Queries enable you to create and store queries to retrieve records based on predefined search parameters.
- ◆ Inboxes enable you to store query syntax on any file and display the results within ServiceCenter application queues.
- ◆ Stored Queries permit you to create and store queries to retrieve and display records based on predefined search parameters.
- ◆ Inboxes enable you to create ticket lists and make them available to the technicians in their application queue.
- ◆ Joined queries permit you to search a specific device type.
- ◆ Global Lists permit you to predefined lists of values and use them on forms to control data entry in drop-down fields.

## Contents

This module contains the following lessons:

- ◆ Lesson 1: Stored Queries
- ◆ Lesson 2: Inboxes
- ◆ Lesson 3: Joined Queries
- ◆ Lesson 4: Global Lists





# Lesson 1: Stored Queries

## Introduction

Users search for the same records with the same criteria over and over again. Writing the search criteria and saving them as a stored query quickens the process and also enables other users to run the same query.

The Stored Queries Maintenance utility enables you to create and store queries to retrieve and display records based on predefined search parameters.

In this lesson, you will learn to display records based on predefined searches using Stored Query.

## Objectives

- ◆ Create and execute a stored query.
- ◆ Access the Stored Query utility.
- ◆ Identify the capability words that enable users to create stored queries.



## Overview

Stored queries are predefined searches saved in ServiceCenter for future use. Stored queries eliminate the need to recreate queries used on a regular basis.

The Stored Query Maintenance utility helps designated users to define and store queries that display lists of specific records, or populate dynamic display objects such as charts and marquees. This utility ensures that the queries run against the files are efficient.

## Accessing the Stored Query Utility

Stored queries are saved as records in the **querystored** file. There are two ways to access the Stored Query Utility:

- ◆ On the **Utilities** tab, click **Tools**, then click **Stored Queries**.

OR

- ◆ On the **System Administrator's Main Menu**, type **sq** in the **embedded Command Line**, then press **Enter**.

## Creating Stored Queries

### Who Can Create a Stored Query?

The following is a list of capability words that must exist in a user's operator record in order to execute, set up, or modify stored queries within ServiceCenter:

- ◆ query.window
- ◆ query.stored
- ◆ query.stored.mod
- ◆ QueryAdmin
- ◆ SysAdmin

### Create a Stored Query

You can create a stored query using the following methods:

- ◆ Access the **Stored Query Maintenance** form and enter the appropriate data and query syntax.

OR

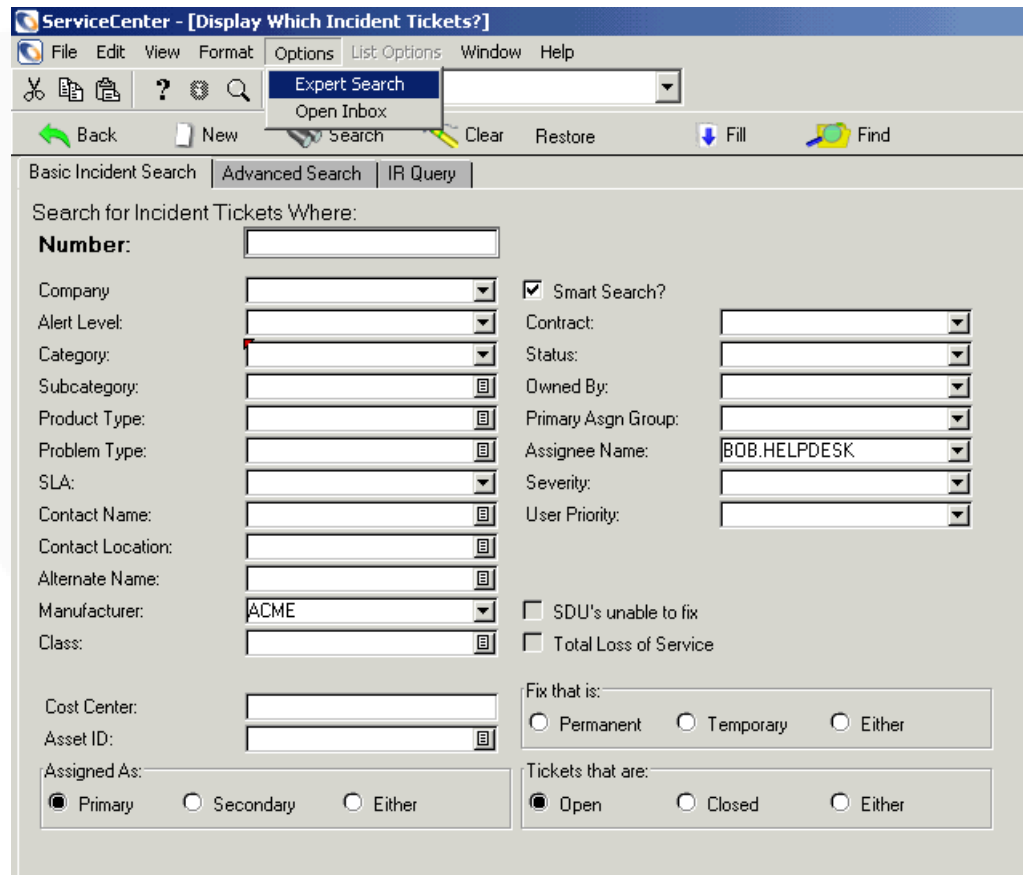
- ◆ Use the **Expert Search** or **Advanced Search** options to complete the **Stored Query Maintenance** form based on the search parameters.



### Using the Expert Search or Advanced Search Options

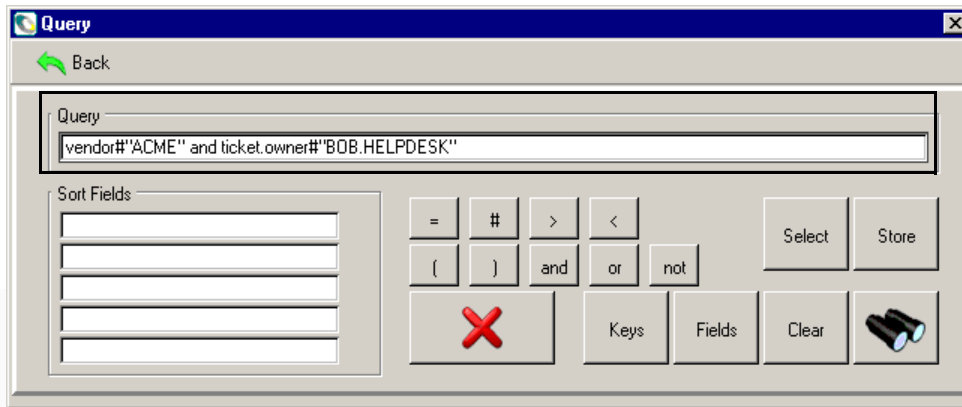
The **Expert Search** and **Advanced Search** options permit you to create a stored query from a search form without knowing the query syntax.

In Figure 2-1, the **Expert Search** option is used to search for tickets opened by **BOB.HELPDESK** and manufactured by **ACME**.



**Figure 2-1 Incident Form**

After you click **Expert Search**, the **Query** window displays the query syntax used by ServiceCenter.



**Figure 2-2 Query Window**

If this query meets your requirements, click **Store**. This action opens the **Stored Query Maintenance** form.

If this query does not meet your requirements, you can modify and test the query by executing a **Search**.

---

**Note:** With this method, the file name and query fields are automatically populated by the system as shown in Figure 2-3.

---



Q5

End Add

Stored Query Maintenance

Name

Description

File probsummary Format Name

QBE Format Script

Query Application

Query

vendor#"ACME" and assignee.name#"BOB.HELPDESK"

Sort Fields

Access List (Query Group or Operator Name)

(Blank list = Available to ALL Users)

**Figure 2-3 Stored Query Maintenance Form**

After this query is stored in the system, it is available for future use.

### **Stored Query Tips**

When creating stored queries, ensure the following:

- ◆ For effective results, use fully keyed field names.
- ◆ Limit query.stored.mod or QueryAdmin capability words to users who understand the difference between efficient (keyed) and inefficient queries.

**For more information about stored queries, refer to the ServiceCenter technical documentation.**

**For practice, refer to the following exercise found in the Exercises section:**

#### ***Creating Stored Queries***



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Lesson 1: Stored Queries



## Lesson 2: Inboxes

### Introduction

Helpdesk technicians need to view specific tickets quickly to increase their resolution time. These ticket lists can consist of tickets that are opened at various severity levels. Inboxes enable you to create ticket lists and make them available to the technicians in their application queue.

In this lesson, you will examine the concept of parent and child inboxes and learn how to create a new inbox.

### Objectives

- ◆ Create a customized inbox.
  - Explain the parent-child relationship between inboxes.
  - Access the Inbox utility.
  - Add the new inbox to the Favorites list.



## Overview

Inboxes are predefined queries that permit you to search for records within a specific ServiceCenter file. Inboxes can be set up against any file in the system. When you first access an application queue, a default inbox is displayed. When selecting a new inbox, ServiceCenter performs a query according to the specified search parameters and the results are returned in the inbox queue.

### Parent-Child Relationship

You can create parent and child inboxes to establish a hierarchical flow between inboxes. This helps to filter the list of records returned in the inbox queue and optimizes user performance. You can define a list of favorite inboxes so you can easily switch between them.

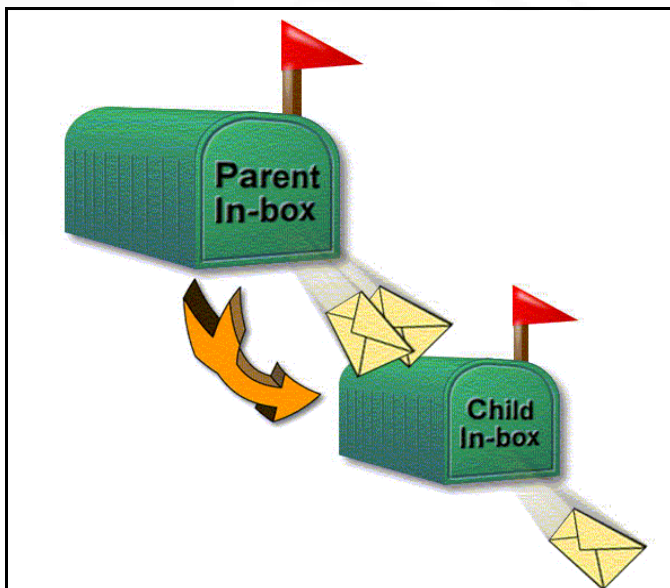


Figure 2-4 Hierarchical Flow Between Inboxes

### Accessing the Inbox Utility

There are multiple ways to access the Inbox Utility:

- ◆ Within Service Management, Incident Management, and Root Cause Analysis, click **Security Files**, then click **Inboxes**.

OR

- ◆ From the Database Manager prompt, type **inbox** in the **File** field, then click **Search** or press **Enter**. Use the **apm.inbox.edit.g** form.



OR

- ◆ From return QBE lists, click **Options > Save As Inbox**. This option take the QBE query syntax and places it in the new Inbox.

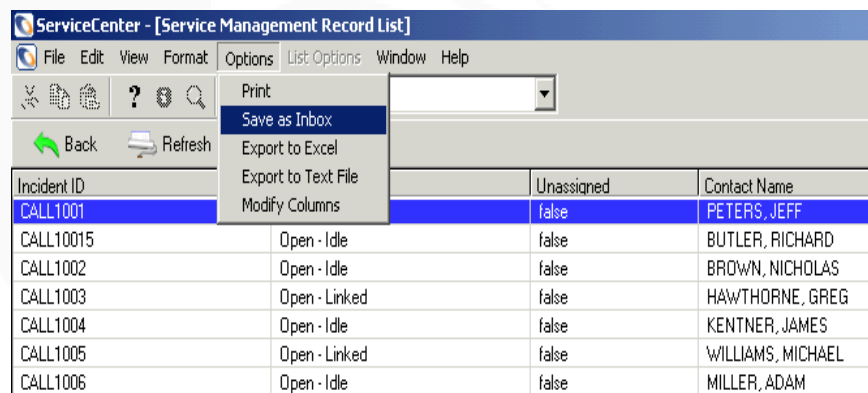
## Creating an Inbox

ServiceCenter permits creation of inboxes from a QBE list within an application.

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**Note:** You can restrict this ability with a user’s personal, group, or **DEFAULT** profile record.

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**Figure 2-5** Selecting **Save As Inbox** from the **Options** menu of a QBE list

After executing a search and viewing a list of returned records, click **Options > Save as inbox**. The **Inbox Maintenance** form opens, enabling you to modify and save the inbox record.

### Basic Tab

The Basic tab permits you to:

- ◆ Specify the file for this inbox.
- ◆ Name the inbox.
- ◆ Select the parent inbox.
- ◆ Specify the owner of the inbox.
- ◆ Specify the type of users who can view the inbox.
- ◆ Set the sorting order by field.



**Figure 2-6 Inbox Maintenance Form - Basic Tab**

### Advanced Options Tab

The **Advanced Options** tab enables you to write or modify a query. The use of **Normalize Date Fields** and **Use Literal Date Fields** radio buttons require dates in the query syntax. **Normalize Date Fields** returns records based on a range of dates; for example, the last seven days. **Literal Dates** is the actual date in the query syntax to return records. If the query does not have dates, these options are not evaluated.

**Figure 2-7 Inbox Maintenance Form - Advanced Options Tab**



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**Important:** When creating an inbox from a QBE list from an application queue, ServiceCenter automatically fills in the query for you. You can modify the query to suit your requirements later.

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### Sub Inbox Info Tab

The **Sub Inbox Info** tab enables you to create an additional inbox list. This list consists of child inboxes or standard inboxes and grants the user selection from the **Filter Current Inbox By:** drop-down area.

**Inbox Maintenance**

Basic | Advanced Options | **Sub Inbox Info** | Information

Sub-Inbox to display:

- All Open Calls
- 
- 
- 
- 

**Figure 2-8** Inbox Maintenance Form - Sub Inbox Info Tab

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**Important:** Whenever an inbox is selected from any area, the full definition syntax is executed.

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### Favorites List

After you create a new inbox, you can add it to the **Favorites** list.

#### ***To add an inbox to the Default Favorites list:***

- ◆ Click **Option > Edit Favorite Inboxes**.
- ◆ Click the next available drop-down arrow and select the name of the new inbox you created.

#### ***To add a personal Favorites list:***

- ◆ Access the Inbox grid through Database Manager or the Central Administration Utilities.
- ◆ Use the logon user name in the **Operator Name** field.



- ◆ Add the inboxes for the specific operator in the Inbox list.

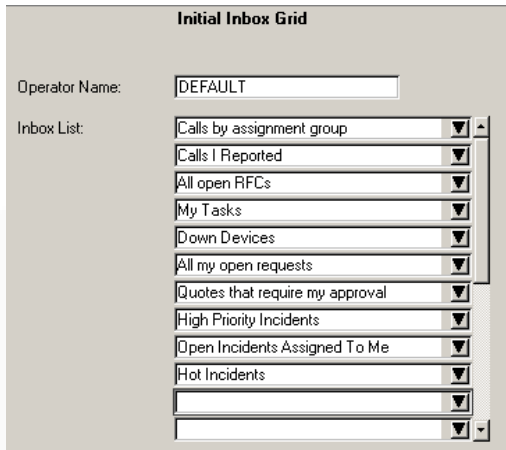


Figure 2-9 Initial Inbox Grid

You can access the new inbox by selecting its name from the **Current Inbox** drop-down list. Then, select the name of the sub inbox from the **Filter Current Inbox By** drop-down list. Results are returned in the inbox queue.

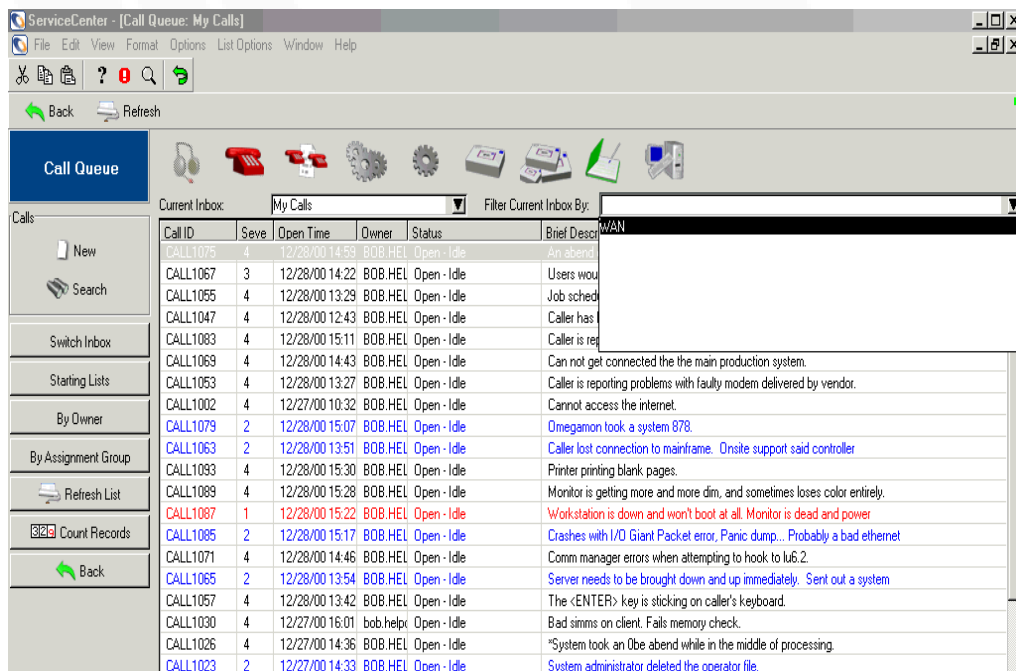


Figure 2-10 Call Queue



Another way to access the new inbox is from the application queue utility. In the specific application queue, click **Switch Inbox** to view a drop-down list of available inboxes.

### **Setting an Initial Inbox**

Having an initial inbox setup in the **Service Management** or **Incident Management Security Files** provides quick access to a primary inbox by an operator or a group of users.

To set up this functionality, access a security profile within an application. Edit the profile by adding the name of the inbox in the **Initial Inbox** field. The user should see this inbox when first entering the queue.

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**Example:** A user could have a primary inbox of his or her incident tickets. This would permit the incident queue to be automatically populated with the operator's incident tickets. The user could have inboxes that can be accessed quickly to identify the incident tickets for the user's assignment group and/or incident tickets in **DEADLINE ALERT**.

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**For more information about inboxes, refer to the ServiceCenter technical documentation.**

**For practice, refer to the following exercise found in the Exercises section:**

***Working with Inboxes***



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Lesson 2: Inboxes



## Lesson 3: Joined Queries

### Introduction

You can search for a specific asset record or a set of asset records in Inventory Management. Joined queries enable you to search for a specific device type using the search form for that device type.

### Objectives

- ◆ Create a joined query.

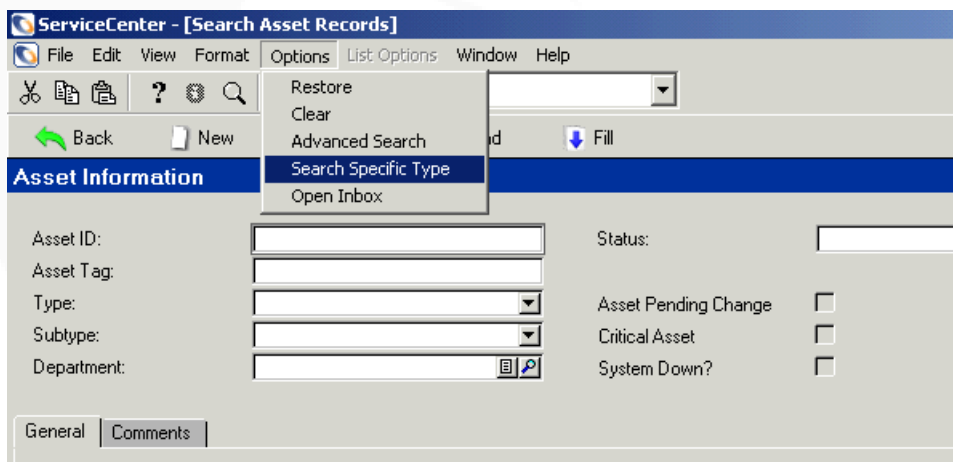


## Overview

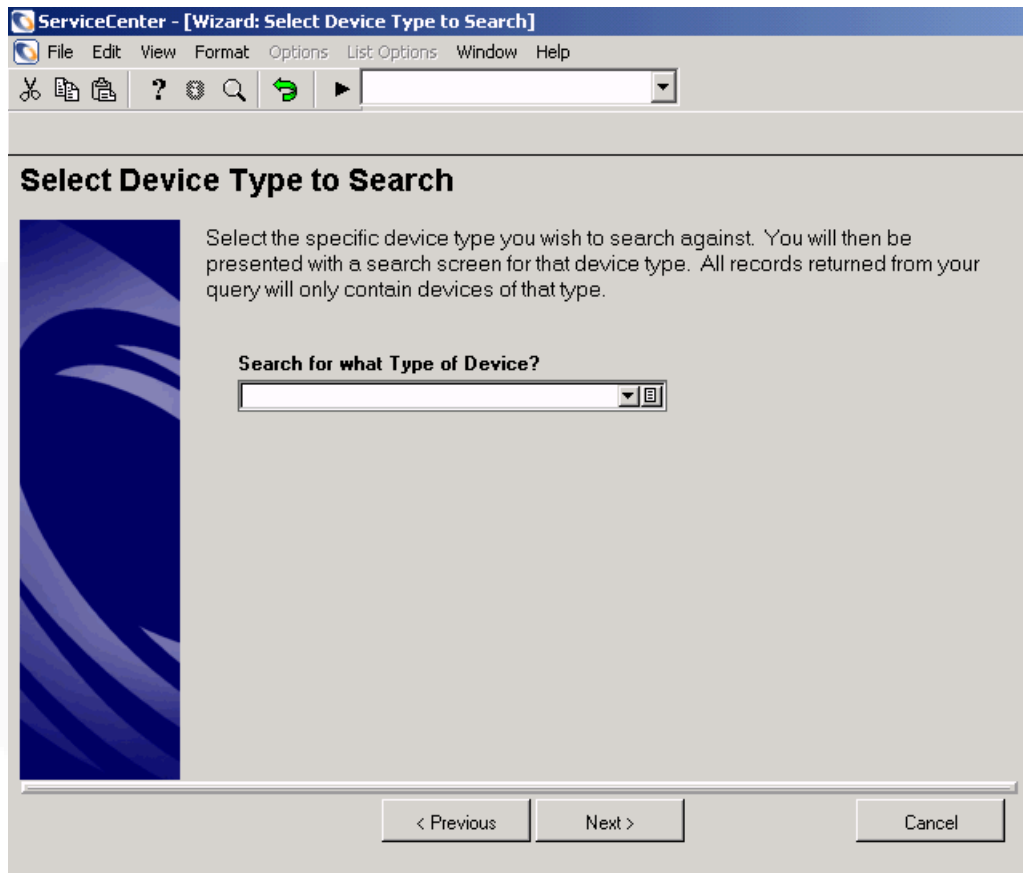
You can search Inventory Management for asset records using different methods. You can use either partial information to search for a record or you can perform a true search without entering any values. Joined queries permit you to search a specific asset record.

## Creating a Joined Query

1. Click **Assets** on the **Assets** tab of the **Inventory Management** menu to access the Asset Information form.
2. Choose **Options > Search Specific Type**.



3. The **Select Device Type** wizard displays.



4. Select the type of device you want to search for from the **Search for What Type of Device?** drop-down list
5. Click **Next**
6. The search form for that device type displays.
7. Specify additional information about the asset for which you are searching.
8. Click **Next**.
9. The asset record displays.

**For more information about joined queries, refer to the ServiceCenter technical documentation.**

**For practice, refer to the following exercise found in the Exercises section:**

***Creating a Joined Query***



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## Lesson 3: Joined Queries





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## Lesson 3: Joined Queries





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Lesson 3: Joined Queries



## Lesson 4: Global Lists

### Introduction

Global lists are predefined lists of values generated from files within ServiceCenter. After a global list is created, it is available throughout ServiceCenter. Because there is only one list, maintenance of the list is easier. Also, because the list is dynamic, users can only select from the list; they cannot change or edit the lists.

Global Lists:

- ◆ Are used on forms to control data entry in drop-down fields, enforce data integrity, and minimize typing errors.
- ◆ Permit drop-down lists to show dynamic values based on records from a separate file.
- ◆ Are stored in the system and are available to all ServiceCenter applications.

In this lesson, you will learn how to display data dynamically in a drop-down list by using the Global Lists utility.

### Objectives

- ◆ Create and display global lists.
  - Access the Global Lists utility.
  - Explain how global lists work.



## *Accessing Global Lists*

Open the Global Lists utility and searching for existing lists to view all available global lists. There are two ways to access the Global Lists utility:

- ◆ On the **Utilities** tab, click **Tools**, then click **Global Lists**.

OR

- ◆ On the **System Administrator's Main Menu**, type **gl** in the **embedded Command Line**, then press **Enter**.

## *How Global Lists Work*

Using the Global Lists utility, you can query a file and store values in a global variable. After these global variables are populated, they can be used to dynamically display a list of values in a drop-down list. Global variables are denoted by **\$G** or **\$lo**.

### **Lister Schedule Record**

Global lists are generated by a background scheduler named **Lister**. Lister "wakes up" every sixty seconds to search for expired global records and generate new ones.

Once Lister builds a list on the server, multiple clients can request and share the same list without building individual copies. This method of building lists improves system speed and helps server-side performance.



Global List Utility

List Name:	Operators	Times Updated:	300
Regen Every:	1 00:00:00	Expiration:	03/15/02 15:15:23
<input checked="" type="checkbox"/> Build List on Startup?			
List Variable:	\$.void	<input type="checkbox"/> Guard Against Duplicates?	
Display Variable:	\$.G.operators		
List Field:	name		
Display Field:	name		
Filename:	operator		
Limiting SQL:	true		
Sort By:			
Application:			
Server App.:			
<input type="checkbox"/> User Defined List?			
Value List:	{"ADMIN", "BOB.HELPDESK", "CA 1", "CA 2", "CA 3", "CI 1", "CI 2", "CI 3", "CLIENT SECURITY 1"}		
Display List:	{"ADMIN", "BOB.HELPDESK", "CA 1", "CA 2", "CA 3", "CI 1", "CI 2", "CI 3", "CLIENT SECURITY 1"}		

Listner Checks every 60 sec.

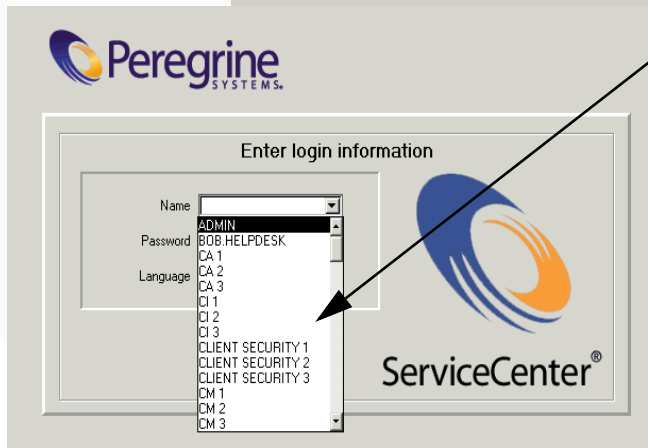


Figure 2-11 How Global Lists Work

**Note:** Global lists are **not** used for multi-text fields.

## Creating and Displaying Global Lists

In addition to viewing available global lists in the Global Lists utility, you can use the utility to create new lists.

### Creating Global Lists

The Global Lists utility:

- ◆ Searches the file name specified
- ◆ Takes a value from an individual field and places the value into the global variable

This process continues until the end of the file.



You can create specialized lists using some advanced features of the Global Lists utility. It is important to:

- ◆ Limit the values added to the global list. Add a query that returns a limited list, rather than the entire file.
- ◆ Sort the list in a different order than the unique key by identifying a specific field from the file.

### Displaying Global Lists

To show the global list on a form, specify the following properties of the combo box in Forms Designer.

- ◆ **Input** – This value must specify a field name in a file.
- ◆ **DisplayList** – The list of all entries that are in the display variable.
- ◆ **ValueList** – The list of all entries that are in the list variable.

If the **ValueList** values are not specified, the **DisplayList** values are stored in the file. If the **DisplayList** values are not specified, the **ValueList** values are displayed in the drop-down list.

Figure 2-12 illustrates the relationship of global variables (**\$G**) in Forms Designer and the Global Lists utility. If you set the combo box **DisplayList** value to **\$G.devnames**, the system displays a drop-down list of device names from the **devnames** file. Similarly, **\$G.devtypes** is a predefined global list that uses data from the **devtypes** file.

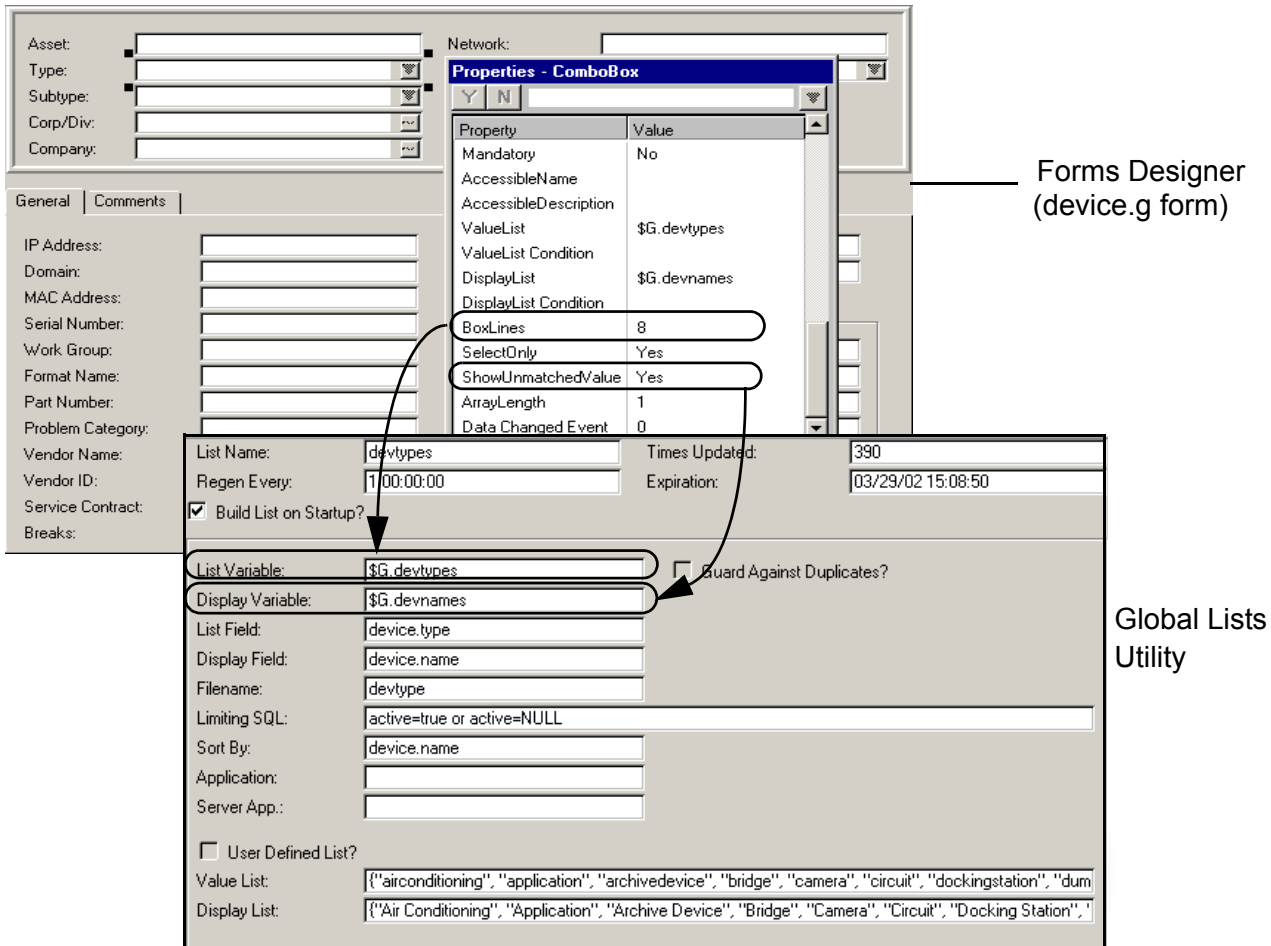


Figure 2-12 Use of \$G variable in Forms Designer and Global Lists

### Specialized Global Lists Tagged by ServiceCenter

To ensure system efficiency, the regen times for global lists are usually long. ServiceCenter tags files whose global lists need to be updated more regularly.

Whenever relevant adds, updates, or deletes are performed against a tagged file, ServiceCenter automatically expires the list. This ensures that global lists are regenerated when Lister wakes up. Because of this, you can specify a long regen interval and still guarantee the accuracy of the list when a list is based on tagged files.

---

**Note:** Do not decrease the regen intervals for any tagged files. This can slow down the system.

---



The following files are tagged:

Assignment	Tzfile
availabilitymap	status
Caldutyhours	sqlwords
category	sqlsystemtables
Config	Pmstatus
dbdict	pmenv
Group	Operator
macrodef	number
Msgclass	

**For more information about global lists, refer to the ServiceCenter technical documentation.**

**For practice, refer to the following exercise found in the Exercises section:**

***Using Global Lists***

## Exercise 5: Creating Stored Queries

**FW:** Jennifer Falcon, System Administrator

**From:** Max Manager, Helpdesk Manager

**Subject:** Listing all pending events

Jennifer,

Can you take care of this request from Kimberly?

Thanks,

Max

---

**To:** Max Manager, Helpdesk Manager

**From:** Kimberly Melo, Events Manager

**Subject:** Listing all pending events

Max,

I'd like to see a quick list of all pending events and a separate list for each Alert Stage of pending events. Can Jennifer set something like that up?

Thanks.

Kimberly

### ***Tasks required to accomplish the scenario:***

1. Build a stored query.
2. Execute a stored query.
3. Let ServiceCenter write the stored query syntax.

### ***Build a stored query***

1. Log on as a System Administrator using the **falcon** operator ID.
2. Access Stored Query Maintenance by one of the following methods:

- On the System Administrator's Main Menu, click the **Utilities** tab, click **Tools**, then **Stored Queries**.
- Type **sq** in the **embedded Command Line**, then press **Enter**.



- From the Expert Search window, click **Store**.
3. Create a stored query for all open events. Use the following screen and table to complete the data entry.

Stored Query Maintenance

Name: Events - Opened

Description: All Events in an Opened Status

File: events      Format Name: events

QBE Format:      Script:

Query    Application

Query: status="OP"

Sort Fields:      Access List (Query Group or Operator Name):

Field	Value
Name	Events - Opened
Description (optional)	All Events in an Opened Status
File	events
Format Name	events
Query	status="OP"



4. Click **Add**.
5. Change the following fields to create another stored query. Use the following screen and table to complete the data entry.



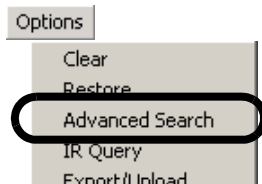
Field	Value
Name	Events - Closed
Description (optional)	All Events in a Closed Status
File	events
Format Name	events
Query	status="CL"



6. Click **Add**.
7. Return to the System Administrator's Main Menu.

### ***Execute a Stored Query***

1. Access Database Manager using one of the methods listed in the **Access Methods Job Aid**.
2. In the **Form** field, type **events**.
3. Click **Search**.
4. Click **Options > Advanced Search** as shown in the following screen.





5. Click **Select** to open the **Stored Query Record** window.

- *How many records are returned?*
- *What do these records have in common?*

6. Double-click the **Events - Opened** record

- *What screen is displayed?*
- *Can you run the stored query from this screen?*



7. Click **Select** or press **Enter** to select the current stored query.

- *What screen is displayed?*
- *What data is now in the Query field?*



8. Click **Search** to execute the query.

- *What message did you receive?*
- *How many records were returned?*

9. Double-click one of the records.

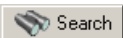
- *What does the status field show?*
- *Why is this value different than the one used in the Stored Query?*

10. Return to the System Administrator's Main Menu.

### ***Let ServiceCenter write the stored query syntax***

1. On the System Administrator's Main Menu, click **Incident Management**, then click **Search IM Tickets**.

2. In the **Alert Level** field, select **alert stage 1** from the drop down list.



3. Click **Search**.



4. Click **Yes** to proceed and run the query.

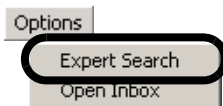
- *Did you have any records returned? If so, how many?*

---

**Note:** If your search returns records, click **Back** to return to the search screen.

---

5. Click **Options > Expert Search** as shown in the following screen.



- *What is displayed in the Query Field?*



- **Can you make changes to the pre-written query?**
  - **How could you improve processing on this query?**
6. Change the **Query** field to **status="alert stage 1" and flag=true**.
  7. Click **Store**.
    - **What form displays?**
    - **What fields are populated in the form?**
    - **Where did the fields come from?**
    - **What fields need to be added to complete the record?**
  8. Finalize the stored query by completing any necessary fields. Use the following screen and table to complete the data entry.

Field	Value
Name	Status 1
Description (optional)	All open incident tickets in Alert Stage 1



9. Click **Add**.
  - **What message(s) did you receive?**
  - **Where did you return?**
10. In the **Query** field, change the **1** to **2**, then click **store**.
11. Finalize the stored query by completing any necessary fields. Use the following screen and table to complete the data entry.



Stored Query Maintenance

Name  
Status 2

Description  
All open incident tickets in Alert Stage 2

File  
prosummary

Format Name

QBE Format

Script

Query Application

Query  
status="alert stage 2" and flag=true

Sort Fields

Access List (Query Group or Operator Name)

Field	Value
Name	Status 2
Description (optional)	All open incident tickets in Alert Stage 2



12. Click **Add**.

13. In the **Query** field, change the **2** to **3**, then click **store**.

14. Finalize the stored query by completing any necessary fields. Use the following screen and table to complete the data entry.

Stored Query Maintenance

Name  
Status 3

Description  
All open incident tickets in Alert Stage 3

File  
prosummary

Format Name

QBE Format

Script

Query Application

Query  
status="alert stage 3" and flag=true

Sort Fields

Access List (Query Group or Operator Name)

Field	Value
Name	Status 3



Field	Value
Description (optional)	All open incident tickets in Alert Stage 3



15. Click **Add**.

16. In the **Query** field, change *alert stage 3* to **DEADLINE ALERT**, then click **store**.

17. Finalize the stored query by completing any necessary fields. Use the following screen and table to complete the data entry.

Field	Value
Name	Status 4
Description (optional)	All open incident tickets in DEADLINE ALERT



18. Click **Add**.

**Note:** Verify that these stored queries execute by accessing the Expert Search window and selecting the stored query name from the record list.

19. Return to the System Administrator's Main Menu.



20. Log off from ServiceCenter.



---

**For more information about Stored Queries, refer to the ServiceCenter technical documentation.**



# Exercise 6: Working with Inboxes

**To:** Jennifer  
**From:** Max Manager, Helpdesk Manager  
**Subject:** Call Queue

Jennifer,

I just learned of the call queue, which is a great utility I want to utilize it more. I'd like the helpdesk technicians to be able to view a ticket list for all three levels of severity. Please implement this ASAP.


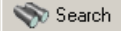
Thanks.

Max

## ***Tasks required to accomplish the scenario:***

1. Create a new Inbox.
2. Update the Favorite Inboxes list.
3. Writing syntax for a new inbox.

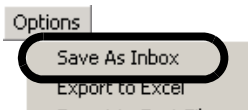
## ***Create a new Inbox***

1. Log on as a System Administrator using the ***falcon*** operator ID.
-  2. Click **Service Management**, then click **Search SM Calls**.
3. In the **Severity** field, select **3 - Medium** from the drop-down list.
-  4. Click **Search**.
  - ***What is the result of the query?***
5. From the **Options** menu, click **Save as Inbox** as shown in the following screen.

---

**Note:** If your Record List is turned on, **Save as Inbox** will display in the List Options menu.

---





Yes

6. Click **Yes** to save the record set.
7. In the **What would you like to call this Inbox?** field, type **Severity 1 - 3 Calls**.
8. In the **This inbox should be visible to** field, select **All Users** from the drop-down list.
9. Click the **Advanced Options** tab.
10. Change the query to look for severity 1, 2, and 3 tickets. Use the following screen and steps to complete the data entry.

Basic | **Advanced Options** | Information

This inbox is defined by: (Only advanced users should change this)

severity="3" or severity="2" or severity="1"

The date normalized form of this query is:

Normalize Date Fields  Use Literal Date Fields

11. Type **severity="3" or severity="2" or severity="1"** in the **inbox definition** field.
  - **What will this new syntax return?**
  - **Why should you change the “#” operator to an “=” operator?**

Save

12. Click **Save**.

OK

13. Click **OK** to confirm the inbox has been added.
14. Return to the System Administrator's Main Menu.

### **Update the Favorite Inboxes list**



1. Click **Service Management**, then click **Call Queue**.
2. From the **Options** menu, click **Edit Favorite Inboxes** as shown in the following screen.

Options

- Select Queue
- Switch Queue
- New
- Search
- Refresh
- Switch Inbox
- Edit Favorite Inboxes**
- Use Stored Query

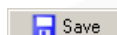


3. In the next available **Inbox List** field, select **Severity 1 - 3 Calls** from the drop-down list.

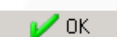
---

**Note:** The newly created inbox might not be in the list. Wait a moment to allow background processing to update the list, then try again.

---



4. Click **Save**.



5. Click **OK** to return to the Service Management Call Queue.

6. In the **Current Inbox** field, select **Severity 1 - 3 Calls** from the drop-down list.

- ***What happened to the inbox list?***

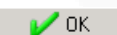
7. Double-click **Call Report number 1043**.

8. Click the **Resolution Detail** tab.

9. Add a **Resolution Code** and **Call Resolution** data.



10. Click **Close**.



11. Click **OK** to return to the **Inbox List**.

- ***Is the call still in the list of records?***
- ***How would you limit this Inbox to only Call Reports that were in an open status?***
- ***What fielding holds the status information?***

12. Return to the System Administrators Main Menu.

### ***Writing syntax for a new inbox***



1. Click **Incident Management**, then click **Security Files**.



2. Click **Inboxes**.

3. Initiate basic information for the new inbox. Use the following screen and table to complete the data entry.



**Inbox Maintenance**

Basic | Advanced Options | Sub Inbox Info | Information

This is an inbox against this file:

Full Inbox Name:

Parent Inbox:

Short Inbox Name:

Inbox is owned by:

Available to these Groups:

Field	Value
This is an inbox against this file	problem
Full Inbox Name	Severity 1 - 3 Incidents
Short Inbox Name	Sev 1 - 3
Inbox owned by	All Users



4. Click **Add**.
5. Write the query syntax on the **Advanced Options** tab. Use the following screen and steps to complete the data entry.

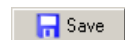
**Inbox Maintenance**

Basic | **Advanced Options** | Sub Inbox Info | Information

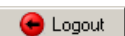
This inbox is defined by: (Only advanced users should change this)

Normalize Date Fields       Use Literal Date Fields

6. Type ***flag=true and (severity.code="1" or severity.code="2" or severity.code="3")*** in the **Inbox definition** field.
7. Select **Normalized Date Fields**.
  - ***In the above syntax, what is the difference between Normalized Date Fields and Literal Date Fields***



8. Click **Save**.
9. Return to the System Administrator's Main Menu.



10. Log off from ServiceCenter.
11. Log on as a System Administrator using the ***falcon*** operator ID.



12. Click **Incident Management**, then click **Incident Queue**.

Switch Inbox

13. Click **Switch Inbox**.

14. From the **Open Which Incident Inbox** field, select **Severity 1 - 3 Incidents** from the drop-down list.

15. Double-click the record **IM1040**.

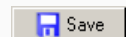


16. Click **Close**.

17. In the **Fix Type** area, select **Permanent**.

18. In the **Closure Code** field, use the **Fill** button to select the **Out of Scope** code.

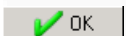
19. In the **Solution** box, type your own resolution.



20. Click **Save**.



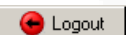
21. Click **No** to bypass forcing call tickets closed.



22. Click **OK** to return to the Incidents Queue.

- ***Is the record IM1040 still showing?***
- ***What part of the Inbox syntax caused the ticket not to display?***

23. Return to the System Administrator's Main Menu.



24. Log off from ServiceCenter.

**For more information about Inboxes, refer to the ServiceCenter technical documentation.**



# Exercise 7: Using Global Lists

**To:** Jennifer Falcon, System Administrator

**From:** Alan Egret, System Administrator

**Subject:** Helpful Global Lists

Hi Jennifer,

I've listed a Global List I think will speed up the process for creating future GL. The second is a request from our users.

1. a GL of all the files for the filename field in the GL utility
2. a GL of contact names accessible from Main Contact field in the events form.

Please let me know if I have the go-ahead.

Thanks.

Alan

## ***Tasks required to accomplish the scenario:***

1. Access the Global List utility.
2. Enhance the Global List utility form.
3. Create a new Global List.
4. Use the Global List variable

## ***Access the Global List utility***

1. Log on as a System Administrator using the **falcon** operator ID.
2. Access **Global Lists** using one of the following methods:

- On the System Administrator's Main Menu, click the **Utilities** tab, click **Tools**, then click **Global Lists**.
- Type **gl** in the **embedded Command Line**, then press **Enter**.
- Access the Database Manager prompt. In the **File** field, select **globallists** from the drop-down list.

Global Lists

## ***Enhance the Global List utility form***

1. In the **Filename** field, type **dbdict**.



2. Click **Search**.
3. Double-click the **files** record.
4. Write down the display variable used for this global list?


- 
5. Return to the System Administrator's Main Menu.
  6. Access Forms Designer using one of the methods listed in the **Access Methods Job Aid**.
  7. In the **Form** field, type *apm.global.list.entry.g*



8. Click **Search**.



9. Click **Design**.
10. Select the **filename** text box.
  - **Write down the value of this Input property?**
11. Press the **Delete** key to delete the text box.
12. Replace the **Filename** text box with a drop-down list. Use the following table to complete the data entry.
13. Click **OK**.

Create a	Using the Forms Design Tool	With the following properties
Drop-down list	 ComboBox	<b>Input:</b> filename <b>DisplayList:</b> \$G.files <b>BoxLines:</b> 15

14. Save the form and return to the System Administrator's Main Menu.

### **Create a new global list**

1. Access the Global Lists utility using one of the methods in the *Access Methods Job Aid*.
2. Add a record that generates a list of all contact names. Use the following screen and table to complete the data entry.

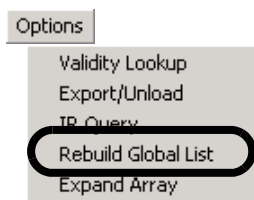


List Name:	Contact List	Times Updated:	
Regen Every:	01:00:00	Expiration:	
<input checked="" type="checkbox"/> Build List on Startup?			
List Variable:	<input type="text" value="\$G.contacts.first.name"/>	<input type="checkbox"/> Guard Against Duplicates?	
Display Variable:	<input type="text" value="\$G.contact.name"/>		
List Field:	<input type="text" value="first.name"/>		
Display Field:	<input type="text" value="contact.name"/>		
Filename:	<input type="text" value="contacts"/>		
Limiting SQL:	<input type="text" value="true"/>		
Sort By:	<input type="text"/>		
Application:	<input type="text"/>		
Server App.:	<input type="text"/>		

Field	Value
List Name	Contact List
Regen Every	01:00:00
Build List on Startup?	true
List Variable	\$G.contacts.first.name
Display Variable	\$G.contact.name
List Field	first.name
Display Field	contact.name
Filename	contacts
Limiting SQL	true



3. Click **Add**.
4. Select **Options>Rebuild Global List** as shown in the following screen.



- **Did the Value List and Display List populate?**
5. Return to the System Administrator's Main Menu.



## Use the Global List Variable

6. Access Forms Designer using one of the methods listed in the *Access Methods Job Aid*.



7. In the **Form** field, type **events**, then click **Search**.



8. Click **Design**.


9. Click the **Main Contact** field.

10. Write down the value of this Input property.

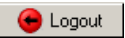
11. Press the **Delete** key to delete the text box.

12. Replace the **Main Contact** Fill box with a **ComFill** box. Use the following table to complete the data entry

13. Click OK.

Create a	Using the Forms Design Tool	With the following properties
Combo list and Fill box	 ComFill box	<b>Input:</b> main.contact <b>DisplayList:</b> \$G.contact.name <b>ThirdButtonID:</b> 8 <b>ThirdButtonVisible:</b> Yes

14. Save the form and return to the System Administrator's Main Menu.



15. Log off from ServiceCenter.

**Note:** You must log off to reset the form's cache.

## Verification

1. Log on as a System Administrator using the **falcon** operator ID.

2. Access Database Manager using one of the methods found in the *Access Methods Job Aid*.

3. In the **Form** field, type **events**.

- **Are there 3 buttons attached to the Main Contact field?**
- **What function does each of these button have?**



- 
4. Click the drop-down arrow.
    - *What shows in the drop-down list?*
  5. Select **TRASK, JASON** from the drop-down list.
    - *Does any other information populate into the form?*
  6. Clear the **Main Contact** field, then click **Fill**.
    - *What information is displayed?*
    - *What file holds this list of records?*
    - *What application is controlling the current functions?*
  7. Double-click the data record, **TRASK, JASON**.
    - *Why did you end up at the contacts input screen?*
  8. Click **OK** to confirm the correct contact person.
    - *What information automatically populated when you returned to the events file?*
  9. In the **Main Contact** field, click the third button.
    - *What function executed?*
  10. Return to the System Administrator's Main Menu.
  11. Log off from ServiceCenter.

**For more information about Global Lists, refer to the ServiceCenter technical documentation.**





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# CH Group: Stored Queries

## Introduction

Sarah Martin has a request for running queries. Here is her e-mail regarding this request.



To: consultant@tdkh.com  
From: smartin@chgroup.com  
Subject: Queries for Lance Bigelow

I've been doing some daily queries that I'd like to have saved. Each time a call ticket is opened it is assigned a severity level. There are five different levels, and I run a separate query for each of these severity levels against all the open call tickets. I'm not concerned about the closed tickets.

Please create and save these queries so that I can run them more often throughout the day.

Thanks,  
Sarah Martin  
Director of Information Technology

## Summary

Do not forget to record what you have done in your Audit Log.





---

# CH Group: Global Lists

## Introduction

Sarah Martin has another request for you regarding global lists. See her e-mail below for more information.



To: consultant@tdkh.com  
From: smartin@chgroup.com  
Subject: Global Lists

The regional name field on the location form needs to change to a drop-down list of all our regions. Since some of the region names are long, please display the full name to the user and store the three-character region code. Our company is growing, and I foresee this list being updated frequently. When making this change, keep in mind it should be dynamically updated, probably once daily, and not hard-coded.

On this same form, I'd like to use one of those combination fill and drop-down list buttons on the department field. The fill button would link out to the department file and return just the department name. The drop-down list would show all the departments available.

I believe I've already seen the department list somewhere so you may not need to recreate the list. I know this is semi-redundant, but the different users like different methods.

## Summary

Do not forget to record what you have done in your Audit Log.

