SERENA

Limiting Configuration Item Selections in Serena Service Manager

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Overview

This tutorial describes how you can limit the selection of configuration items (CIs) available to end users when they submit a new request.

This modification is extremely useful when IT departments define IT services as configuration items within the CMDB. The modification allows the number of CI selections available to end user to be limited when they submit an incident.

For example, IT may track email service and phone service as independent configuration items. IT may want to have the end user select which of these services to relate a new request. IT wants to filter the CI selection list to only the relevant items, instead of requiring the user to navigate through multiple CIs to find the appropriate issues.

The following procedure describes how to limit the selection list for configuration items that appears to the user on a submit form. It contains all of the modifications that you would need to make to the Incident Management and CMDB applications found in Service Manager.

Limiting Selection List

The following procedure describes how you can create configuration items for your Email and Phone services, and then limit the selections available in the *Configuration Item* field on the submit form to these items. The procedure makes use of hidden field option which is used to limit the selections available to the submitter.

> **Note:** To perform the following actions, you will need the appropriate permissions such as the ability to add items to the CI Category auxiliary table and the ability to modify process apps.

The following steps are divided into sections based on where you must implement the changes.

IN THE USER WORKSPACE

Create the configuration items for each IT Service and assign them to the category service type using the following steps:

1. Create the **Service** category by adding Service to the **CI Category** auxiliary table (**Manage Data | CI Category**).
2. Create configuration items for the different services such as `Email` and `Phone` by submitting the item into the **CMS** application and selecting **Service** as the CI Category type.

IN SBM COMPOSER

Modify the Incident Management process app to add a hidden field that is dependent on the entry selected for the Category field.

Perform the following steps in SBM Composer:

1. Open the Incident Management process app.
2. Add a *Single Relational* field to the table editor and name it *Restrict CI*.

3. Select the **General** tab of the field **Property Editor**. Select *Hidden* in the "Privilege section" list.

4. Select the **Options** tab, and choose the **CMS** application and **CI Categories** table from the selection list.

> **Note:** The CMS entry will not appear unless you have previously opened the SSM Configuration Management process app in SBM Composer. If you do not see the entry and have not opened the process app, save your changes and open the SSM Configuration Management process app. Then reopen to display the CMS option.

5. Select the **Dependencies** tab and select **Configuration Item**.

6. Choose to **Edit Value Restrictions** for the **Base Workflow**. The limited selections will affect all users submitting either incidents or requests.

> **Tip:** Selecting the **Service Requests** workflow to only limit the selections available to users submitting requests and not incidents.

7. Select **Restrict CI** as the independent field, **Configuration Item** as the dependent field, **Category** as the matching column, and either **First Valid Entry** or **None** for the value.

8. Select the **Visual Design** display, and choose the **Submit** form.

9. Add the **Configuration Item** field to the Submit form by adding a row where the field should appear and then dragging the field form the **Form Palette**.

> **Note:** If you are using Service Manager 1.0 or 1.1, the Configuration Item field may already appear on the **Submit** form.

10. Add the **Restrict CI** field to the form by dragging it from the **Form Palette** and placing it on the bottom of the form.

> **Note:** Since the field is in the Hidden section, it will not appear on the form.

11. Deploy changes.

IN SBM SYSTEM ADMINISTRATOR

To limit the CI selections to only the Service category, set the value of the Restrict CI field to **Service** for the submit transition.

Perform the following steps in SBM System Administrator:

1. Open the Incident project.
2. Select the *Submit* transition on the **Transitions** tab.
3. Set the field value for the **Restrict CI** field to *Service.*
4. Allow the services to be easily selectable in a drop-down list by selecting the **Configuration Item** field and choosing **Allow Override** on the *Attributes* tab and **Single Drop-down List** on the *Options* tab.
5. Repeat for the *Service Requests* project.

> **Note:** For on-demand environments, use Web Administrator to set the field value.

Additional Modifications

The following bullets include additional modifications that could be made to the process apps to improve your processes based on the selection of the IT Service for the configuration item. These are high-level suggestions that require knowledge about modifying process apps in SBM Composer.

- Transitions can be modified to take advantage of the conditional routing feature available in SBM. You can route the incident based on the selected configuration item.
- Automatically clear the Configuration Item field when the incident moves to the Classification state. Clearing the CI field requires that the technician choose the correct configuration item for the incident before the incident can be transitioned. This modification allows the user to select a configuration item at the high level, and then requires the technician to recategorize it or verify that it is correct item for the incident.

ABOUT

Serena Software, the Change Governance leader, helps more than 15,000 organizations around the world—including 96 of the Fortune 100 and 90 of the Global 100—turn change into a business advantage. Serena is headquartered in Redwood City, California, and has offices throughout the U.S., Europe, and Asia Pacific.

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