

Team Calendar

Developed by Ivanti



Purpose:

This provides a centralized team calendar to record On Call; Vacation and Time Off for one or more teams. It provides a centralized calendar where a manager might view current or upcoming time off and vacation schedules as well as a way to see who is on the "On Call" schedule. It also ties into the Time Off request offering whereby upon completion of the HR task the detail is automatically added to the employee record (Schedule tab) as well as to the central calendar.

Interoperability / Compatibility:

This Team Calendar can be applied to the following HEAT Products

Ivanti Product: Ivanti Service Manager (formerly HEAT Service management)

Minimum Version: 2016.1

Other Prerequisites:

List any environmental prerequisites:

- **Italian culture added as Language**

Note: The metadata Package includes some fields that were translated into the Italian culture and if that is missing the application of the package will error as these fields would not exist in the target system. Adding this culture will prevent this error.

Installation Instruction:

Prep Work: Before you begin, back up your local HEAT database. This can be done either manually, for on premise implementations.

For Cloud implementation scenarios this is not required as backups are frequently taken of the cloud environments anyway.

Installation Instructions:

Sample:

Import the “Team Calendar” package by doing the following:

1. Log into HEAT Service Management as an administrator.
2. Click **Configure Application** on the top right to go to the Configuration Console.
3. On the left, click **Build > HEAT Development Package**.
4. Click **Import Package** on the top right.
5. Select **Validate and apply if no errors** and click **Browse....**
6. Browse to the “*Team Calendar*” package and select it.

Optional Installation Instructions:

Is desired, an updated Time Off request can be applied to support Use Case #2. After downloading the updated Time Off request offering from the App Store, log into HEAT as either the Service Owner or Administrator. Open the Request Offerings workspace and from upper right corner select “Import Offering”, browse to the request offering downloaded earlier and follow the prompts.

Note: there are 2 different Request offerings (.rof) files offered, based on what version of HEAT Sm you are running.

Configuration Instructions:

No additional configuration required to utilize the app. It will work fully as soon as the package is applied successfully.

How to verify proper implementation

Log in using the Administrator or Service Desk Manager role. Open the “Team Calendar” workspace to verify it is available. Open any Employee record, click on Schedule tab and create a new record, filling out the fields as needed. Upon save, go back and re-open/refresh the calendar and a corresponding entry should be created.

To test the request offering, log a Time Off request, accept and complete the HR task. Once complete, a schedule entry should be created for the corresponding employee and the entry added to the calendar.

How to Use the APP (basic user manual)

Use Case 1 – On Call Schedule

Log in using the Administrator or Service Desk Manager role. Open the Employee workspace, search for and select the desired employee. Click on the Schedule tab and select “New Schedule”. Enter in the details, selecting “On Call” as the Schedule Type. Click Save and check the Team Calendar to ensure the new schedule appears as desired.

Use Case 2 – Requesting Time Off

Log into Self Service and open the Service Catalog. Log a Time Off request and once the task is completed, the new Time Off schedule will be added to the submitting employee’s record and will automatically be added to the calendar. Check the Team Calendar to ensure the new schedule appears as desired.

Changes to the HEAT environment:

The App makes changes to the HEAT data model as outlined below.

Changes made by this APP to a standard OOTB environment

- Changes applied to the data model
 - Added “Team Calendar” calendar
 - New Validation Object: LeaveType
 - New Pick List: Schedule Type
 - New Business Object: OnCall_TimeOffSchedule
 - New Relationship: Employee to OnCall_TimeOffSchedule
 - Added new tab (Schedule) to both Employee layouts
- List all new or modified Workspaces
 - New “Team Calendar” workspace added as top level tab for following roles:
 - Admin
 - Service Desk Manager
- Quick Actions
 - Adds three new Quick Actions to the Employee object
 - Create On Call Schedule
 - Create Vacation Schedule
 - Create Time Off Schedule
- Modified “Time Off” request offering to add automation to create Schedule record for employee requesting

Support Contact:

App is provided As Is. Support for Ivanti Service manager (formerly HEAT Service Management) is provided by Ivanti.