Service Manager 7.10 Transfer of Information

Frequently Asked Questions

HP® Software — Service Management

Introduction

The following questions and answers were collected during the Service Manager 7.10 Transfer of Information sessions. They are intended as an additional resource to the recorded sessions or attending the life TOIs.

Prerequisites

Attendance in any Transfer of Information events is required as well as good knowledge of Service Manager.

The answers in this document apply only to Service Manager 7.10. They may be different for past or future versions of Service Manager.

Embedded Best Practices

Summary of new Features

- Embedded Best Practices come with new out of box content and process documentation.
- Categorization in Service Desk, Incident Management, and Problem Management now uses 3 levels. The 4th level still available, but not needed for OOB functionality.
- We now have one customer type OLA used in incident and problem management and still multiple SLAs used in Service Desk interactions.

Questions and Answers

- If the customer needs two SLAs (or better OLAs) of type customer, will Service Manager be able to handle it?
  - It is possible to have multiple SLAs defined in the Service Desk module that handles customer interactions. These SLAs are stored as type service in the system. Only one OLA is allowed in the system. This SLA record is of type customer and is used in all incidents and problems. It may be possible to tailor the system to add more OLAs.

- How do you start or stop the SLA in the Service Desk interaction when the 2nd Level helpdesk responds to the incident assigned to him that is related to the interaction? How do you track SLA details when an interaction is escalated to an incident?
  - This can be done via tailoring.

- What is the difference between underpinning contracts and OLAs?
  - Underpinning contracts and OLAs are interchangeable (UCs being used for external vendors, OLAs for internal) and should abide by all rules (i.e., pending vendor/customer). Do not override the out-of-box interaction status, such as open linked, to get information from the incident's status.

- What are the "Request for Information" and "Complaint" categories supposed to be used for?
  - Request for Information should be used when a caller requests information on topics such as "how to" or "where do I find" questions. The complaint category is used when a customer

wants to file a complaint about how a previous interaction or incident was handled by the helpdesk personnel. The complaints are automatically assigned to the helpdesk manager.

- Should 2-step-closure still be used with the embedded best practices?
  - 2-step closure (Resolve status) is typically not used when the Service Desk module is implemented to handle customer feedback on related incidents.

- Does Service Manager 7.10 have a survey feature?
  - SM 7.10 does not have a survey feature implemented with Service Desk or Incident Management to handle customer feedback.

- What is the purpose of the location field when escalating from an interaction to an incident?
  - Often an incident is reported against a CI at a certain location. To support this CI, it is a best practice to have a local team assigned to the incident. Additionally, the location field can be used for follow the sun support. Each device has a location.code that it is assigned to, and each device has an assignment group to which it defaults. If the device is at a different location from its default, it is important to give this information to the person working the incident.

- Is there or will there be a class or documentation on wizards?
  - Hopefully there will be.

- What is executed when escalating an Interaction to either an Incident or a Change?
  - Clicking the escalate button executes the "escalate interaction" wizard that then proceeds to the "escalate interaction – complaint", "escalate interaction – incident", "escalate interaction – rfi", or "escalate interaction – rfc" wizards. The "escalate interaction - incident – ke" can be called from the "escalate interaction - incident" wizard when relating to an existing known error.

- Can the escalate wizard handle popups and forms?
  - Yes, the wizard can create popups and call additional forms if tailored to do so. Be aware that the display format control on the newly created incident will not be executed, since the record is not being displayed on escalation.

- Can you use the Modify Columns functionality while you are in a wizard?
  - No

- Why does the Save button sometimes show up in an interaction?
  - The Save button is available in interactions after they are escalated. It shows up before escalation when you click the Smart Indicator on the contact and then view an existing interaction. This defect has been reported.

- Why not consolidate interaction and incident?
  – Service Desk and Incident Management are separate modules with different processes.

- Will we at a later time merge the operator and contact tables? - A combined table may help with better administration of people, and possibly make LDAP integration easier.
  – There are no current plans to combine these two tables.

- How can you solve the issue of having multiple domains in an LDAP environment and finding the person trying to authenticate in any one of many domains?
  – This should be doable by defining an LDAP proxy that passes on the request to the other LDAP servers.

- Why are there 5 phases in Problem Management now instead of 2 phases as in earlier versions?
  – The new problem phases are in line with the defined best practice workflows as described in the help server.

- Why is it required to put in the Known Error Resolution Date when opening the first phase of the known error? Shouldn't that be after the change was worked on or after the resolution was implemented?
  – The Resolution Date determines the date when a resolution is expected, not the actual resolution date. This information should be available before entering the change or implementing the actual solution.

- Where is the Default category in Change set and where can it be changed?
  – The Default category is set in the Process being called from the cm3r screlconfig records: screlate.cm3r.category

- Why are all changes opened from another module always using the default category?
  – A person who is not a change operator may not know what the correct category should be so they will not be asked to do the categorization. Any change manager or other change management user will be able to choose from all the categories available when opening a change directly, or when switching an existing Default change to its proper category.

- How should Problem Management be implemented and used?
  – As a best practice, leave the Incident open when opening a problem, so that all updates that should come through from the problem will be passed to the incident. In addition, open incidents that have the problem candidate flag set, are available to the problem manager in a new view "open problem management candidates". The incident is put into "Problem Updated" status when the problem record is updated with more information, so that the helpdesk agent can see the additional information.

- How do you know a problem related to the incident has been resolved and closed?
  - Service Manager uses ioevents and ioaction to handle updates and closure of related records. The interoperatibility engine is called whenever an activity is added (sc.activity RAD application), or whenever the screlation table is updated. The ioevents table defines which actions to take whenever a record described in the ioevents table is updated or closed. The ioactions execute the updates to the related records and define this update.

- Is the functionality available when a change or other record closes it closes all related records automatically?
  - Yes, via ioevents and ioactions.

- Are the OLAs the same as the old SLAs and just a rebranding?
  - Yes

- Is it possible to not install the Embedded Best Practices?
  - No, with Service Manager 7.10, the embedded best practices are part of the out-of-box system.

- Do known errors use Service Level Management / the customer OLA?
  - No, Known Errors do not use SLA, only Problem Control uses the Base Monitoring SLA record.

- When you search knowledge from the interaction which tables does it search?
  - Known errors, problems, interactions and incidents

- If a customer is licensed for knowledge, is a knowledge search quicker instead of the Smart Indicator?
  - Smart Indicators help to find previous issues related to the user or service. Knowledge searches are geared toward the issue description.

- Is the feature to find potentially related tickets gone?
  - No, it is still available, but turned off by default. It can be turned on, but supposedly is not working consistently with the escalation wizard's sequence of screens. We recommend not using this feature, because the ensuing IR search can be very resource intensive, especially with larger implementations.

- Is the feature going to be removed?
  - No, there are no plans to remove the find potentially related tickets feature.

- The difference in the active and inactive Smart Indicator icons colors are difficult to see. Can this be changed?
  - We have to conform to HP policy but have asked to have this changed.

- How do the customers feel about the new categorization and screens in Embedded Best Practices?
  - We have received good feedback and the new look is more consistent with blueprint. Customers generally like the new screen layout.

- Is there a Request for Service category in the Service Desk interactions?
  - Old Service Desk customers dealt with service requests within the interaction. The same can be done in Service Manager from the Service Catalog, but this is a feature that needs to be purchased separately.

- The Problem Management and Known Error processes seem to be repeated. What is the difference between them?
  - Problem Control is for the investigation and diagnosis of root cause
  - Error Control is for the investigation and diagnosis to attempt to find a permanent resolution

- Service Desk customers have SLA for time to respond and resolve. Shouldn't the interaction and incidents align for SLAs?
  - The OLA will have to be such that it can align with the SLO used in the interaction. This can be done for example by passing a VIP flag from the interaction to the incident for customers who need a much faster resolution time.

- Can you relate one Service Desk interaction ticket to multiple Incident tickets?
  - Yes, once it has been successfully escalated to an incident.

- Is Knowledge Management integration with dynamic html (K2 spider) available?
  - Service Manager is using an older version of the Verity K2 search engine and we are not leveraging all of the search engine capabilities on purpose. If we can do so without breaking the current engine, we may, but we will replace the K2 engine in future version. We do not know what capabilities and which feature functionality will be available at that point.

- Do we support a sub-administrative role instead of sysadmin to create and change users?
  - The user Admin.General was created for this purpose.

- Does my devices Smart Indicator query for all my devices records or is it constrained by me?
  - The MyDevices Smart Indicator will query for all CIs that belong to that business service, not just the devices that belong to the user calling in.

- What is the purpose of the accepted status in Incident Management?
  - The accepted status indicates that the person assigned the incident accepted responsibility for it and will start working on it. The statuses are explained in the online help in the "Incident Details tab" item under Incident Management.

- Do you have to use the embedded best practices? There are concerns about upgrading for customers who do not have IIA and all of the issues with conflict resolution.
  - Upgrades should not have any specific issues as the forms are new so they wouldn't show up in conflict resolution. You need to plan on which parts to accept from the new processes and workflows. SM 7.10 contains changes to the upgrade utility that may help.
  - This is the going forward best practice process and customers need to understand that this will be in the future versions of SM OOB and in the offerings from C&I, SaaS, etc. Customers may not choose to address the processes the first time around but look at them later. Pay me now/pay me later. We understand that there will be customers who need to get upgraded now who won't adopt the new processes.

- Does the Escalation Wizard still use the screlate functionality?
  - Yes, the escalation wizard uses the screlate functionality so tailoring can be done in the screlconfig records. The links used are screlate.<source>.<target>.

- Can Smart Indicators be leveraged in other places?
  - Yes, a white paper that describes using it in other modules has already been published.

- Do customers have to keep the out-of-box categorization of incidents/interactions or can they use their own?
  - We recommend staying with the 3 level categorization. The category values (incident, change, request for information, complaint) should be kept, new ones can be added but have to be added to the escalation wizards accordingly. Areas and sub-areas can be modified to the customer's needs.

- Why is the Service required, but the CI is optional?
  - An end user is more likely to know that his e-mail service doesn't work than what part of the e-mail services isn't working. The MyDevices Service represents all personal devices that the user would use.

- The example with the DVD burner broke down where you had to get a replacement but you had to go all the way out to the interaction to get the contact. Customers won't like that. Is the answer if the CI information has the contact and you use the hover?
  - Customers may not like to accept the fact that incidents and everything higher are not customer specific, but they are bound to the CI. The best solution is to make sure that each CI has information on where it is located, and if it is a "personal" CI, who is the owner.

- The Location selection in the escalation wizard does not affect the assignment in the embedded best practices, why?
  - Yes, you select the location but that has no influence on the assignment. The assignment is purely done based on the information in the CI.

- Going through the change workflow, when falcon clicks Close, it exits out of the change record, why?
  - It does that when the user closing the phase is not the user who will work on the change in the next phase based on his user role.

- What are the differences between Best Practice and Blue Print?
  - Blue Print is an additional HP product, extending the Service Manager best practices on top of the SM 710 Best Practice

- How do you best handle large amounts of shared CIs such as shared desks with telephone, computer, printers etc.?
  - To limit the amount of records shown to the Helpdesk user when opening a new ticket for a person who is not the owner of a CI, but a shared user of that CI, create Services such as MyDevices for each shared area (e.g. Marketing Devices, HelpDesk Devices, etc.).

- After filling in the Interaction Contact and Service Recipient fields, I went back and blanked out the contact name and then re-filled it with another name. Why does it go gray?
  - The Smart Indicator is deactivated (going gray) when no data is available.

- In the Interaction, if I press the Escalate button and abort in the middle of the wizard using the cancel button, I return back to the Interaction form but the Escalate button is gone. How can I make a second attempt at the Escalate?
  - Once the interaction was saved for the first time, it can be escalated to an Incident via the Related > Incidents > Open menu option.

- When in the Change review phase of the Default Change category, I don't have a Close or Next Phase button, nor a reject button. Seems the only option is Change Category or Change Phase.
  - The Default change category is supposed to be used to determine if a change that was opened from another module should be implemented and to gather all necessary information before assigning it to the correct category and then phase and group. Once the Default change is in the review phase, the determination of proceed or close is done. If the change is supposed to proceed, it needs to do that in the proper category.

- It was said that when closing the change, the related records will get updated or closed in the background. Don't all of those steps have to be done manually?

- The ioevent and ioaction definitions are executed when closing a change. They take care of updating the related records according to their definitions.

- Do I have to use the out-of-box forms in SM 7.10?
  - When installing for the first time, you can either use the out-of-box forms or tailor the system to your needs. In an upgrade, you will make the decision during the upgrade process.

- You can select a future date for root cause identified, which should not be possible. Same for solution identified date
  - These fields are supposed to be planned dates. The date when the root cause should be identified and the date when a solution should be identified.

Service Catalog

Summary of new Features

- New look
- Localization support
- Multi-currency support

Questions and Answers

- What is the future of Request Management, how should it be positioned and when should it be sold?
  - There is no plan to get rid of Request Management (RM). There has been no investment recently due to the Service Catalog changes as a front for RM. The current plan is to identify where Asset Manager is strong and remove that capability from RM. Request Management would then be more of a backend for Service Catalog.
  - The Asset Manager with Service Catalog integration needs to be tested in real life. When we have this integration work well, we will then make RM changes within Service Manager.
  - Sell Request Management if the customer doesn't have Asset Manager (AM) and has no need for Asset Manager, since they already have a financial procurement system. Otherwise try to sell AM as well.
  - Request Management performs the more complex fulfillment functionality behind Service Catalog, but is still less complex than installing AM.

- Asset manager 5.0 uses the Service Catalog module from SM 7.0. Does it work in 7.10?
  - There were no changes that we are aware of so this should still function the same.

- When enhancements are made, will integrations be included?
  - Release Control will be positioned as the release manager dashboard. Release Control is more tightly integrated with Service Manager 7.10.

- Why is the new feature for quantity support restricted to 1 item only, rather than a flexible number?
  - This feature was built as a result from a specific customer requirement. This customer wanted to limit the number of laptops (for example) to order in a single setting to just one.

- Is it possible from the Web client to click a direct URL link from Service Catalog's HTML Viewer to open a browser in a new session displaying the content of that URL?
  - No.

- When a Service Desk agent enters the catalog request for an end user, do the Service Desk agent's rights apply or the end user's rights?
  - The catalog rights are given based on capability words. The capability words of the logged in user are applied when the Service Desk agent orders for an end user, meaning the Service Desk agent's rights. For this feature to work correctly, it is best if the Service Desk agents have access to all catalog items.

- Does currency conversion get applied for recurring cost?
  - No. Currency conversion only gets applied for the initial purchase cost.

- Does currency conversion affect evaluations such as approvals?
  - Currency conversion works as follows: The system has a system currency defined in the system information record. The price of the item is stored internally in the system currency on placing the catalog request in Service Manager and all calculations are made based on that. Depending on the user's own currency settings in the operator record, all currency values are displayed to the user in that currency. Approvals are calculated based on the system currency. This value will not change over time when the currency conversion rate fluctuates, so currency conversion does not affect approvals.

- In the catalog manage wizard can we allow use of fill or other link in the XML?
  - The XML representation of user options does not execute a fill based on a link record, so it cannot be passed a more detailed query to limit the amount of records returned.

- Are there any enhancements to catalog segregation or multi company control?
  - No enhancements were done in Service Manager 7.10 to allow for catalog segregation or multi company support.

- Can we specify order of catalog categories?
  - No, they are set by display name.

- Is the rich text editor used in Service Catalog the same as in Knowledge Management?
  - Yes.

- When clicking a hyperlink in the rich text viewer, can the underlying link information be changed?
  – This information can be changed in the html source (view source button in the rich text editor).

- What is a non-cart item?
  – A non-cart item is supposed to bypass the add to cart step of the catalog order process and directly open an interaction. This is not fully implemented and does not work at this time.

- Is it possible to order from catalog using an existing self service interaction?
  – Yes, you can until it is categorized.

- Is it possible to default the description, title, impact urgency, and service so that the helpdesk user does not have to do that manually?
  – This can be tailored, not out-of-box.

- Can the required information screen (purpose, needed by, urgency) be removed in Service Catalog?
  – This cannot be tailored, since the display of the required information screen is done via the RAD application sd.get.request.info

- Can an approval rule be based on dollar value?
  – Yes, under cart item there is a cost field that can be used in an approval rule.

- What happens if there are no approvers for that cart item?
  – The request is then automatically marked as approved.

- Does Service Catalog support double byte?
  – Yes, with the new server changes in Service Manager 7.10.

- Does the localization of catalog items affect the backend of fulfillment?
  – The catalog item is the same the only difference is the localizable items are copied in the svcDisplay and joined to the original catalog items. The catalog items are not displayed as two tables joined together: svcDisplay and svcCatalog.

- Does the language field in the operator have anything to do with localization?
  – For localization the language on the login screen is used. The language in the operator record indicates the default language displayed in the login screen.

- In Service Catalog, can we have user options depending on the item selected? For example, if we select Laptop we get different options than if we select Desktop?
  - Yes, selections are stored within the catalog item in xml format. Desktop and Laptop are different catalog items, so they can have different options. But you are not able to set a validation or a decision tree implementation based on catalog selections.

- When you do the order hardware from HP, why is the frame with the text so small? Can it be expanded?
  - The size of the rich text description field can be increased in Forms Designer to accommodate longer text.

- Service Catalog interaction connector has been disabled in the wizards but it is there, why?
  - The Service Catalog interaction connector is disabled in most wizards because it is a “do nothing” connector – not opening a new interaction on approval. If it is enabled in the wizards, then a new interaction will be opened on approval. This has not been tested though. The interaction connector should be used for things such as reset password, requests for information, etc. where no other fulfillment engine is needed. The Service Catalog interaction connector can only be used for non-cart items.

- Will the out-of-box Service Catalog be translated with the language packs?
  - Not at this time.

- Quantity support: Can a user order 1 item (e.g. a phone) each time they start a new cart? How do you know if a person already has one if it is not a subscription item?
  - The new quantity support only limits a user to 1 item per order / cart, but he can order the same item multiple times by creating and submitting the cart with that item several times.

- I'm not sure how we know if an item is a "dedicated" subscription item. Is that a checkbox on the item?
  - A dedicated subscription item is an individual subscription in the Subscription table that does not have the CI field filled in. This is due to the fact that the dedicated item was not yet received at the time the subscription was created.

- In the demo when you create a catalog item, the detailed description was required. Why doesn't it have the red hat on the field or a * next to the field name like other required fields?
  - That feature is not available on the HTML editor object.

- How do we license this new use case where users call the Service Desk to order from the catalog?
  - The Service Desk employee taking the call consumes a regular ServiceDesk license.

- How are we doing currency conversion and keeping it up-to-date?

– The best way is to use a Web Service offering to retrieve currency conversion rates on a regular basis.

- Is the Service Catalog overwritten by the language pack?
  – Since we do not localize the catalog items out of box, it will not be overwritten.

Approval Delegation

Summary of new Features

- An authorized approval user can now delegate all or select approvals to other approval users for a specific time.

Questions and Answers

- Can you delegate select approvals?
  – The selection can be done to module and then to approval group level.

- Can some approvals be excluded from the delegation?
  – Once an approval is delegated, then all approvals going to that person or group are delegated. There is no way to set a limit for example on the approval amount.

- Are notification emails on approvals sent to the delegate automatically?
  – Notifications are sent to both the original approver and his delegate automatically.

- Can a delegated approver re-delegate to another person?
  – No, a delegate cannot assign delegated approvals to someone else. He could delegate his own approvals to someone else at the same time as taking over from someone though.

- In Service Catalog you can dynamically determine the approver via JavaScript. Do these approvals work with approval delegation as well, or just the static approvals as in Change Management?
  – Yes, dynamic and static approvals work with approval delegation, since the approval record contains the approver's name.

- When you set someone else as an approver, can you still approve your own or will you no longer see your own approvals?
  – Both the original approver and the delegate will see the approvals.

- In ESS when a user views the record they are to approve and chooses "Approve a Request" from the left hand menu, it locked the record in prior versions. Has this been fixed?
  – Yes.

- If an approval delegation comes into effect and there are outstanding approvals (for that approver), will the outstanding approvals be delegated also?
  - Yes.

- Can the approver delegate his approvals to a group?
  - No, only persons can be delegates, not groups.

- In the initial approval definition you can assign the approval to a group as well as to individuals. Can we then delegate these group approvals to another group or only an individual operator?
  - Only individual operators

- Is it possible to delegate an approval to more than one operator?
  - Yes, you can delegate the same approval to multiple different people

- Is Approval Delegation available for Request Management as well?
  - Yes, you may delegate approvals, given proper rights, in all modules that have approvals.

- Is it possible to split the Approval Delegation across different groups?
  - Yes, no matter which kind of approval (personal/group) you can assign to multiple delegates but not the same delegate for the same approval at the same time.

- What happens to the Approval Delegation when the delegate loses the right to approve for that module?
  - The delegation is still active, but the approval will return an error message.

- When selecting a delegate, the view is in order by login name. I assume it could be by last name, first name instead? How do I do this within a wizard and what looks like JavaScript executing?
  - This behavior can be customized by editing the JavaScript ApprovalUtil function getFilteredQuery**.** You can either call the JavaScript array sort function (array.sort() or array.reverse()) or the rtecall sort function (system.functions.rtecall("sort",,,,)).

- If I create an approval delegation and then edit it to uncheck the active button, the whole Approval Delegation record disappears. I expected it to still be in my list of delegations but just not active.
  - Deactivated Approval Delegations disappear from the delegation wizard, but are still visible in the ApprovalDelegation Queue under the View “My past approval delegations”.

UCMDB Integration

Summary of new Features

- Service Manager 7.10 comes with a Web Service integration to UCMDB

Questions and Answers

- For customers that already have CI information in the device table within SM, is there a way to get this information into UCMDB?
  - The Web Services based integration moves data only from UCMDB to SM. There are other packages that send information from SM to the UCMDB which you may be able to use, or you can use the Connect-It solution that was used in SM 7.0.

- Which part of UCMDB comes with SM 7.10?
  - Service Manager 7.10 comes with UCMDB Foundation. The Discovery element is separate.

- Is the scheduler to send data from UCMDB to Service Manager in SM?
  - No, the scheduling of data transfer is in the UCMDB.

- What's the advantage of using Enterprise Discovery (ED) or Discovery and Dependency Mapping Inventory (DDMi) to get the actual state data rather than UCMDB?
  - Going directly to ED gives more up-to-date data than going through the UCMDB.

- How is the data loaded into the UCMDB?
  - In our example we got the data via DDMi (ED)

- Which version of UCMDB is compatible with SM 7.10?
  - Both UCMDB 7.52 and UCMDB 8.0 are tested and compatible with SM 7.10.

- How do I add an additional discovery adapter?
  - You will have to create your own adapter and write your own TQL, both are possible in UCMDB.

- How does the UCMDB connect to SM?
  - Any valid login to Service Manager will work. We recommend configuring a login specifically for UCMDB.

- How is the communication between SM and the UCMDB implemented?
  - The new interface uses Web Services to connect Service Manager and the UCMDB.

- Will communication over https work?
  - By default https is blocked. You can change it by following the instructions in the wiki:
  - http://wiki.mercury.com/confluence/display/mam/Enabling+SSL(Https)+for+UCMDB+-+SOAP:

Steps for enabling SSL

1. Enable SSL in JBoss

2. Create a certificate and add it to the UCMDB server keystore(Optional, if one already exists)
3. Add the certificate to a Client UCMDB (Optional , only if certificate is unsigned)

Client UCMDB: refers to an additional UCMDB that connects to the UDMCB with added SSL support.

Enabling SSL in JBoss

To enable the JBoss in ssl, you need to edit:
<UCMDB Server dir>\j2f\EJBContainer\server\mercury\deploy\jbossweb-tomcat55.sar\server.xmlAnd unmark the tag that start After: <!-- SSL/TLS Connector configuration using the admin devl guide keystore

```
<Connector port="8443" address="${jboss.bind.address}"
           maxThreads="100" strategy="ms" maxHttpHeaderSize="8192"
           emptySessionPath="true"
           scheme="https" secure="true" clientAuth="false"
           keystoreFile="${jboss.server.home.dir}/conf/myKeystore"
           keystorePass="changeit" keyAlias="myCert"
           sslProtocol = "TLS" />
```

The **keystoreFile** and **keystorePass** must be set to the correct path of a java keystore and its password respectively.
If the keystore holds more than one certificate, the first one will be used.
To choose a specific certificate, use the **keyAlias** attribute with the alias of the certificate.

With the above settings, JBoss will look for the keystore in:
<UCMDB server dir>\j2f\EJBContainer\server\mercury\conf\myKeystore

Creating a certificate

To create a new unsigned certificate: *(* see below: using unsigned certificates)*

goto: <UCMDB server dir>\j2f\<JRE>\bin

execute: keytool -genkey -alias myCert -keyalg RSA -keystore <UCmdb server dir>\j2f\EJBContainer\server\mercury\conf\myKeystore
*this will generate the certificate and add it to the keystore

Export the certificate to file:

keytool -export -alias myCert -keystore <UCMDB server dir>\j2f\EJBContainer\server\mercury\conf\myKeystore -file c:\myCert

Adding certificate to an additional (Client) UCMDB(recommended)

It's also recommended to add the key to the ucmdb java keystore. (See above, for exporting the certificate to file)

goto: <UCMDB server dir>\j2f\<JRE>\bin

execute: keytool -import -trustcacerts -alias myCert -keystore ..\lib\security\cacerts -file c:\myCert
*default password: changeit

Using an Unsigned certificate

If using a certificate that is not signed by a Known Certificate Authority (*AKA*: CA).
For example: Verisign, Thawte, etc.

By default, any java based program will not accept connections to the webserver.
To allow for example for a different UCMDB server's adapter to connect to the ssl connection,
one must add the certificate into the *Client* UCMDB truststore(keystore).

see *'Adding certificate to UCMDB keystore'* and follow the instructions at the *Client* UCMDB (the one with SoapAdapter)

Configuring Soap-Adapter for SSL

Goto the Soap-Adapater configuration in the UI.

In the text box marked 'URL'
put only the word: **https**

All other definitions should be exactly the same as none ssl/https configurations (see relevant documentation).

- How is the Actual State tab filled?
  - We use Web Services to pass the request through the UCMDB to the ED adapter, unless the ED adapter is disabled.

- Can the default UCMDB port of 8080 be changed to avoid conflict with for example Tomcat?
  - Go to <uCMDB_Server>\hp\UCMDB\UCMDBServer\j2f\EJBContainer\server\mercury\deploy\jbossweb-tomcat55.sar and Open the server.xml file and change the port number

- Can the Actual State tab be turned off and how does it work?
  - The Actual State tab is activated when the UCMDB integration is checked in the System Information record. When clicking on the tab, the HTML Generating Script called CIActualState.getActualState is executed, which calls the UCMDB web service and defines the output. To turn the Actual State tab off, set the visible condition to false or uncheck the UCMDB integration flag (if no UCMDB integration is implemented on this system).

- Where does the info on Actual State come from?
  - The information is retrieved via a Web Service through the UCMDB. What information is passed through to the Actual State tab can be defined in the TQL via Query Manager in the Integration – SM Query folder. This folder contains all the queries that are used for the Actual State tab. The query is selected according to the type of the CI. For example, hostExtendedData is the query that is used for computer devices. To modify the information passed, you can change the query, remove or add host resources or, if you want to change the attributes that are sent, change the layout of the nodes that are part of the query.

- Is there a difference on the Actual State tab between the Windows or Web client?
  - There is no difference between the Windows and the Web client.

- Is it possible to change the HTML Generating Script?
  - It is possible to change the JavaScript, but do so with caution and at your own risk.

- How do you know that a CI came from the UCMDB or find it if it is already in SM?
  - The reconciliation is done via the UCMDB ID (ucmdb.id) value in the device table that contains the UCMDB unique ID, unless defined differently in the reconciliation rules.

- What does the View in UCMDB button do?
  - This button launches the UCMDB web interface and displays the CI information in the UCMDB.

- How does the UCMDB send a delete action?
  - The UCMDB sends information that a certain CI was marked as deleted. You can add a condition to the Discovery Event Manager (DEM) Rules if you want to limit which CIs can be deleted and which need special treatment.

- How can the incident and change creation be customized?
  - You can either edit the existing script for changes to default values and other minor changes, or create custom script in the DEM Rules. If, for example, you want to have different rules for server computer CIs than workstation computer CIs, you can use two different rule records with different conditions and different actions. Or you can use one rule record and modify the actions in custom java script.

When looking at CI attributes in the UCMDB, what does the color coding mean?

- Dark blue attributes are new attributes for this Configuration Item Type. The black attributes are inherited and the light blue attributes are override of inherited attributes.

- How do you know which attributes of a CI are managed?
  - Go to the managed fields tab in the Discovery Event Manager Rules. As a best practice, all of these managed fields should be listed on the Managed State tab in the CI as well.

- How can you prevent a difference in units (mb, gb, etc) from opening unplanned changes?
  - Add the label to the form in Service Manager as soon as you know the discovered unit. Different units will open unplanned changes, but from the Change you can update the CI to the unit received from UCMDB. Once you know what the unit is that comes from UCMDB, adjust your Service Manager forms and records accordingly.

- Will DEM work with other cmdbs?
  - If the other cmdb supports Web Services, then DEM may be tailored to be used with it. This would be a different integration from the out-of-box provided one, though.

- What is defined in the extaccess record?
  - All fields that are communicated between UCMDB and SM must be defined in the extaccess record. Not all fields in the extaccess record must be managed though.

- What don't you get if you don't have UCMDB?
  - No Actual State tab information, no change verification, no unplanned change

- What is the advantage or benefit to using UCMB?
  - With SM 7.10 UCMDB is optional and Service Manager will run without it. We store Actual State data in the UCMDB or access them through the UCMDB. The Managed State is handled within Service Manager and defines what attributes have what values according to Configuration and Change Management. The recommendation is to use the UCMDB to retrieve the Actual State information and to discover unplanned changes as well as verify planned changes. Symphony is used within HP BTO products to integrate to other products of the product line. The integration to BAC for CI information will be through the UCMDB as well.

- Instead of customers buying Connect-It should we sell them UCMDB instead?
  - Connect-It is used in other integrations to replicate data between different end points. The UCMDB can be used for storing and processing CI information, and acts as a federation hub, so it provides more extensive functionality.

- Is there a UCMDB Connect-It connector?
  - Yes.

- Since UCMDB has federation ability to go out to various unrelated type data sources, and can bring information in, can this common view be replicated to SM?
  - Yes, Service Manager doesn't need to know where the information comes from, it just requests from the UCMDB. The federation correlation happens in the UCMDB.

- Are we eventually replacing Connect-It with Web Services?
  - Yes, where feasible. Connect-It isn't being discontinued as a mass data load utility, since it is much faster than web services.

- When will it be necessary to use Connect-It for the UCMDB integration?
  - SM 7.0x used Connect-It, SM 7.10 (and newer) uses only Web Services for the integration.

- Since the UCMDB scheduler is not part of the basic foundation installation, is it charged separately, too?
  - The scheduler is part of the foundation license, but needs to be installed separately.

- BAC is coming out with UCMDB 8.0 are we waiting for that?

– Service Manager works with UCMDB 7.52 and UCMDB 8.0.

- The Actual State tab shows the actual state from the UCMDB federated from another source?
  – Yes.
- Not all customers deploy DDMi, from where do they get the Actual State information?
  – They can retrieve it from the UCMDB or another discovery application
- There is no SMS adapter for UCMDB. How can it be added?
  – This can be done with a services engagement. You can teach the UCMDB about SMS via TQL.
- What you select in the data store determines what information is pushed to SM?
  – Yes
- What does the permit deletion in target mean?
  – It allows the UCMDB to send the delete CI request to SM. Within Service Manager, the DEM controls the action triggered by the delete request.
- UCMDB does both federation into SM and replication into SM?
  – Data is pushed into Service Manager by a full or delta sync, but the Actual State tab is displayed via a web services query
- The DDMi-scan could be a week old or older, is there a button in SM to trigger UCMDB to do a rediscovery?
  – This functionality needs UCMDB 8 and is planned for a future release of SM. It is not possible at this time.
- UCMDB can use different discovery tools (DDMi, DDMa, etc.). What happens if it was originally discovered by DDMi and you view the actual state tab. Where does it go?
  – Different discovery tools put the data into the UCMDB where it can be consolidated and then sent to SM. The Actual State tab gets the information from the datastore defined in the webservices.xml file.
- Is UCMDB a separate download or included in SM 7.10?
  – On the download sites you get SM 7.10 and the UCMDB separately. New customers will receive UCMDB with SM 7.10. The KM server for 7.10 is the KM server for 7.0 so it won't be on the 7.10 media. You will need to pull down the KM server separately as well.
- Is there a separate autopass for UCMDB?
  – UCMDB does not require autopass.

- Is it possible to transfer services built on top of UCMDB CIs to SM? CIs are discovered but services must be created manually.
  - You can create Services on the UCMDB side, since they are seen as CIs in Service Manager. Relationships between CIs can be passed from UCMDB to SM, which is what determines the elements of a Service.

- If you have new managed fields in other data types do you have to modify the configuration files for each one?
  - Yes, modify all files and then run the reload once.

- Would you have to do this if you were using SMS?
  - Yes

- Does UCMDB come pre-configured or do you have to write scripts?
  - It is pre-configured but needs to be activated and the URL to the UCMDB entered in the System Information Record.

- Is it possible to run SM 7.10 together with the BAC UCMDB?
  - The BAC UCMDB may be installed embedded (same machine as BAC), or external (separate machine). Only the external BAC UCMDB installation is supported with SM 7.10.

- Does the sync transfer only updated data to Service Manager?
  - There is a diff sync and a full sync available in the UCMDB for updates only or full transfer of data.

- Are relationships synchronized between UCMDB and Service Manager?
  - Yes.

- Can you push relationships from Service Manager to UCMDB?
  - Not in this version.

- Are all out-of-box TQLs licensed in the UCMDB?
  - Yes.

- In a scaled environment, should you connect the UCMDB Web Service to a dedicated port?
  - This can be implemented but it is not a requirement.

- How is the unique ID maintained between UCMDB and Service Manager?

- The ucmdb.id field in Service Manager contains the unique identifier for the record in the UCMDB. When a record is added to Service Manager for the first time, the logical.name is created as CI + number from the number table.

- How do the CI's initially get populated and synced between ED and SM or between UCMDB/DDM and SM? For example, if logical name is the primary unique key, to what field in ED or UCMDB/DDM is this mapped? Is that specified in the xslt file?
  - As a best practice, CIs should be created by the scan, so the logical.name field is populated automatically via the number definition. The unique ID from the UCMDB is passed to Service Manager in the ucmdb.id field.

- Can I have some CI types get their attributes from ED like desktops and have other CI types get their attributes from UCMDB like servers?
  - This all depends on the definition within the UCMDB.

- If the UCMD webservices.xml is set to retrieve the information from ED and there is no data on this CI in ED, but it is in UCMDB will it send back the info from UCMDB instead?
  - If the ED – UCMDB integration is set to not overwrite existing data, then this will work.

- What are the minimum required privileges of the integration account with the UCMDB?
  - No special privileges are required other than having a valid login to UCMDB.

Configuration and Change Management

Summary of new Features

- Configuration Management uses a new baseline feature
- Configuration Management now has managed and actual state information for the CI
- Change Management automatically opens unplanned changes if unexpected results are returned from the UCMDB
- Changes can now be verified via UCMDB.

Questions and Answers

- Is the UCMDB mandatory for SM 7.10?
  - No, it is optional.

- What happens to the old baseline records when upgrading to SM 7.10?
  - They are still usable, but as a best practice, try to go to the new way of doing baselines.

- In what table is baseline data stored?
  - The new baseline functionality is stored in a table called baseline.

- If an unplanned change is created when a planned change isn't done correctly, will it open a new unplanned change or update the existing change?
  - If the change is still open and the same attribute was found to be different than expected, the existing change will be updated rather than a new change opened. Same device + same attribute = same change.

- When a change is done on a group of CIs, how do you proceed when only one of them is changed?
  - The change can only be closed when the changes to all CIs were validated. Until then, the change will stay open.

- In the Change logging phase, clicking the Close button to proceed to the next phase exits the change record, why?
  - If the person clicking the close button is in the role that would proceed working the change, the change would continue to be displayed. If the logged in person's role is not who would proceed with the change, it will exit out.

- How does the change validation work if there is no UCMDB?
  - Instead of automatic validation, the user will have to manually validate the Change was done correctly.

- If the change was validated but not yet closed and a new replication is run, will another unplanned change be opened?
  - The UCMDB findings will be ignored, since there is an existing change for this CI and this attribute already open.

- A new unplanned change is opened under which circumstances?
  - If a change is already open for that attribute and CI or there is an update for that attribute in the same CI, no new change is opened. If the same CI has a new attribute changed, a new unplanned change will be opened.

- What causes DEM rules to fire?
  - When a request comes in via Web Services for one of the ucmdb* web services, the custom action of Discovery Event Manager is executed. The Discovery Event Manager can be executed from any extaccess record when a Web Service request comes in, if the extaccess record refers to Discovery Event Manager.

- Any recommendations on how to build baselines on existing CIs in SM?
  - There is no automated way to build baselines based on existing CI configurations. They have to be created manually.

- How do you get CIs from Service Manager into the UCMDB?
  - The CIs in Service Manager should be identical to the ones discovered by a discovery tool. Set the reconciliation in Service Manager so that duplicates are avoided, prior to running the synchronization. Any discrepancies will open unplanned changes in the beginning, but they will level out over time.

- If a planned change has a list of attributes to be validated by the UCMDB, do you have to set each one to implemented and then it is set to validated on synchronization?
  - Every single attribute has to be changed to "implemented" on task completion, or the UCMDB will detect the change and set the attributes to "pre-validated" on the next synchronization after the change was done. When the attribute change was set to implemented, on validation the change request will be closed automatically. If the attribute change was pre-validated, the change has to be closed manually.

- If you have a list of CIs with only one attribute change, can these changes be consolidated into one change record?
  - Yes, you can open one change and associate the list of CIs, then enter the attribute that needs to be changed for all of them.

- How do we audit past changes to a CI?
  - Historic changes are stored in a separate table: data modification events (dataModEvent). Information from this table is displayed in the CI via virtual join.

- When looking at pending and historic changes from the CI, is that a virtual join?
  - Yes, information from the dataModEvent table is displayed in the CI via virtual join.

- What is the link between the CI record in SM and UCMDB?
  - The ucmdb.id field is used out-of-box to link the Service Manager CI to the unique ID for the CI on the UCMDB. A number of other fields can be used to link the CIs, such as the network name, if a different reconciliation rule needs to be used for the implementation.

- How do we modify the attributes that are shown in the Actual State tab?
  - All non-empty attributes from the UCMDB are shown in the Actual State tab. The attributes assigned to the CI can be changed in the TQL. Go to the Query Manager in the UCMDB application. Open the Integration – SM Query folder. This folder contains all queries that are used for the Actual State tab. The query is selected according to the CI type, for example hostExtendedData is the query used for hosts (computers). To change it you can change the query, remove or add host resources or change the layout of the nodes that are part of the query, if you want to change the attributes that are sent.

- Change Activities: Was it a design decision to exclude the journal functionality?
  - This was a design decision. You can include activities in Change Management by following the steps outlined in the white paper on adding activities to other modules.

- Where does Asset Manager fit into this?
  - Assets are different from CIs, although there is an area of overlap. Asset Manager will be a federated source to get information into the UCMDB, but they will stay separate for now.

- We got the base state from Asset Manager and then discover the actual state. The managed state is covered in Service Manager. Previously the way we integrated AM and SM is no longer recommended and AM is now a federated source to UCMDB?
  - When requesting information that is stored in Asset Manager, the UCMDB can get it via an ad hoc request. Alternatively, you can go directly from AM to populate the managed state in SM, but when doing so, you must populate the ucmdb.id field as well to ensure that future communication between SM and UCMDB still work on that CI.

- A Help Desk operator needs to find out warranty info in Asset Manager. Can it be done OOB?
  - No, this would need to be created. The best way is to go directly to Asset Manager. In the future this information can be stored in the UCMDB.

- Is the Baseline the CI at discovery point?
  - No, the baseline is defined in configuration management as a starting point.

- Can Connect-it work with DEM?
  - If you use the web services connection, it can work.

- Can the auditing that was done in Service Desk be done with SM in conjunction with unplanned change?
  - Auditing works in SM with the auditspecs and audit tables, but the results don't display nicely and are difficult to report against. Changes in the UCMDB can be sent to SM and unplanned change can be opened. These things can be audited via the dataModEvents table.

- In what release did it become a requirement to recycle SM when making extaccess changes?
  - SM 7.0

- Where does the field name in the Discovered Event Manager rules come from? They are not the dbdict field names.
  - The field names use the caption from the datadict (Data Policy) record. They are the "pretty" name for the field name in the dbdict.

- Is there only one form for all CI's managed states?
  - Yes, it is only one form (configurationItem) with type specific information on tabs with visible conditions.

- Where would the relationship between CI and services be built?
  - This would be done in the TQL. Relationships are stored in the UCMDB. For more information, visit the UCMDB documentation.

- In Connect-It there are collections of data while UCMDB seems to be one-to-one. How do you map software collections to UCMDB?
  - In Service Manager, this collection would be an array. Arrays are handled the same way as simple fields – see the example xslt below:

example of ips (ips_mapping.xslt):

```
<xsl:for-each select="ips">
  <addlIPAddr>
    <xsl:for-each select="ip">
      <addlIPAddr>
        <AddlIPAddress><xsl:value-of select="@ip_address"/></AddlIPAddress>
        <AddlSubnet><xsl:value-of select="@ip_netmask"/></AddlSubnet>
      </addlIPAddr>
    </xsl:for-each>
  </addlIPAddr>
</xsl:for-each>
```

- Are the old baselines gone?
  - Yes, we now use the new baselines for CIs. We assign baselines to a CI vs. assigning a CI to a baseline in the older version.

- Is baseline a configuration type of baseline?
  - No, it is in the baseline table.

- Customers would like the ability to have multiple baselines for a CI such as a hardware baseline and a software baseline. Is this possible?
  - No, it is only possible to assign a single baseline per CI

- How would you compare a software baseline to the computer the software is installed on?
  - UCMDB TQL to push software into the computer table (needs to be added to computer attribute table).

- This is great for hardware but how do you capture rogue software for example?
  - If software is a managed field, it would open an unplanned change. Needs tailoring on both sides.

- What does the update cancelled by trigger message mean when first assigning a baseline to the CI?
  - This issue does not occur consistently and has not been reproducible.

- What is the best practice for adding a number of computers to a baseline?
  - Mass update from a QBE list.

- How is the Actual State call made to UCMDB?
  - All integration in SM 7.10 to UCMDB is done via web services.

- Where would you define how much you get in the Actual State tab?
  - The extaccess on SM and xslt on UCMDB define which fields are communicated between the two products. All non-empty fields are pushed from the UCMDB to the Actual State tab. The sort order is determined by the UCMDB.

- Is there a view that compares the actual to the managed state?
  - No because SM doesn't store the Actual State information.

- How do you find out what software is assigned to a machine?
  - In Configuration Management – Resources - Manage Software

- In system information definition active integrations, you can integrate directly with ED. Can you query ED directly without UCMDB to bring information back to SM and store it?
  - You can tailor a direct ED integration using Connect-It. The recommendation is to go through UCMDB for full functionality though.

- With which UCMDB version was SM7.10 tested? Which UCMDB version is recommended with SM7.10?
  - Both UCMDB 7.52 and 8.0 are tested and supported.

- How will future upgrades with the integration customizations be handled?
  - On the Service Manager side the upgrade utility will be able to handle all customizations.
  - How does the upgrade to a newer UCMDB version work (short step summary)?

    - Back up the CMDB, History and Foundation databases.
    - Uninstall previous installation of UCMDB.
    - Install HP Universal CMDB version 8.00.
    - During installation, you are asked for details of the Foundation, CMDB, and History databases.
    - Enter the names of the version 7.5 databases.
    - Start the HP Universal CMDB server.
    - Data upgrade is performed during the first start up of the HP Universal CMDB Server (Verify that all services are up including the HP Universal CMDB MAMPACKAGER service).
    - The schema version is updated to 8.00 only after data upgrade has completed.

- How do you search for a computer with less than 2 gig memory?
    - Options > Search specific type > computer > enter 2 in memory field. Then go to the expert search option and replace the # or = with <

- Discovery finds information like Operating System names in different formats. With Connect-IT we can use map files to normalize this data when it is fed into SM or AM. What options do we have with UCMDB to SM?
    - Make sure that asset information is the same in SM and UCMDB. If not, an unplanned change will be opened. The UCMDB has tools to reconcile information as well. Refer to UCMDB documentation for more information.

- Can baselines use wild cards?
    - No, wild cards only work in search screens. In a regular record the wild card character is just a string.

- Shouldn't the discovery tool be consistent in how it reports what it discovers?
    - Yes, that's why it is easier to make changes on the SM side to avoid inconsistencies. The discovery tool will always return the same information for the same thing.

- What if the customer doesn't like how discovery reports the field?
    - It is possible to use display list / value list in the Managed State tab to display it in a way the customer wants it displayed. You can modify the value on the UCMDB side as well, which would apply too when using different discovery tools

- Does Connect-It have an intelligent mapping option that is not available (or intelligent) with the new UCMDB direct integration?
    - The UCMDBs enrichment function does the same.

- Can we embed an html page to the windows or web client, or embed any browser?

- Can't be done currently

- Why is the approval status approved when the planned change is first opened?
  - When there is no approval pending it is automatically set to approved.

- If the change was denied, would that automatically set the change to cancel?
  - No, if the denied change is supposed to be closed, click the Reject button to do so.

- Is the status in the pending changes based on the change phases?
  - Yes. Each phase has a different form that is called for the data modification event. These different forms have the status dropdowns hard coded.

- Can we change the proposed and plan phases to something else?
  - The values are hardcoded in the RAD ddm.exceptionMatching and cannot be changed.

- What happens if someone changes a managed attribute? How do you know that it was done?
  - You can set up auditing using the auditspecs definitions. The results are not easy to report on, since the audit table contains its information in an array of structures.

- So just to clarify - there is no OOTB audit on Configuration Items in SM 7 for changes that are manually done by SM operators?
  - That's correct

- Don't we need CI auditing for SOX Compliance?
  - Probably yes

- We are currently implementing SM 7 and UCMDB 7.5. Question: -- where should I create a business service? Option 1) In UCMDB and synchronize SM 7 with the standard integration providing the relations between the business service and the underlying CI's? Option 2) In SM7 as part of the service catalog and managed by the change/config mgmt process and then synchronized with UCMDB?
  - SM 7.0 uses Connect-It. SM 7.10 uses web services that goes from UCMDB to SM. Best practice is to use UCMDB

- In the Change Verification scenario, does the UCMDB actually do the verification, or does it depend on DDM extensions to UCMDB for this to work?
  - DDM extensions do the discovery, then this information is synched to the UCMDB which in turn provides the verification to Service Manager.

- Why is there no workflow tab in the unplanned change?
  – If it is approved, it goes directly to close. If it is denied, it could have a workflow tab, but there isn't one because the form does not have one.

- Is there a "do nothing" rule in the DEM?
  – No, you have to choose something to do.

- Is there a reason why the workflow widget goes left to right instead of top to bottom?
  – Will be switching to new visualization in the future that may be top to bottom.

- Plans to make it drag and drop?
  – Possibly in a future release.

- Can multiple attributes be modified in one change?
  – Yes

- Why did we create baselines the way we did?
  – In Blue print baselines are mandatory and we put them in to conform with blueprint.

- What is blue print?
  – Blueprint will be another option to use on how to implement Service Manager. The software was formerly sold by C&I, now it is part of HP software. People defining what that should be will be moving to software as well soon.

- When you do a find on a CI in an interaction or incident it gives the service as well as the CI. Shouldn't it only show the CI?
  – Yes. The query "logical name isin $memberList" is needed for the fill functionality, the find should only show the record that matches the value in the field the link was called from

  – The query should say if logical is not null search for …..If it is null, search for $memberList…

- Can you use other inventory tracking tools and use the DEM Rules?
  – Yes, you have to write a custom Web Service connection to do that.

- Is there a function to show the difference between baseline and managed state?
  – There is a view that lists the records that have a conflict, but no conflict details.

- Is there a performance impact if you have a large amount of baselines?
  - No.

- Can you create a baseline on a group of CIs?
  - CIGroups are available for baselines, but you cannot create a baseline that shows details for a router, server and software at once.

- When filling in a baseline into a CI, does it copy the baseline data into the record?
  - No, it does not copy data into the CI record, since it would then overwrite other managed state information. If needed, it can be tailored to fill in the data on first creation of the CI.

- Are there any wizards for upgrading CIs to a new version of the baseline?
  - Nothing that would do all CIs automatically via Change Management (possible to create a task per CI). Mass update is available.

- Can the UCMDB or Service Manager detect the relationship between a failed verification on a change for one CI and an unplanned change on another CI when, for example, 2 GB of RAM were installed to the wrong CI during a planned change?
  - No, the change manager will have to make this determination in person. The software will not detect that the RAM was installed in the wrong machine.

- What happens when the UCMDB diff sync tries to update a CI that is locked?
  - It will try again later.

- Will two changes on the same CI be related to each other when opened by the UCMDB?
  - No, both changes will be independent of each other. The CI will show both pending changes.

- Is it possible to prompt for Approval comments same as Denial comments?
  - Yes. In the Object record for the table (eg. cm3r), on the Approval tab check the Require Appr. Comments checkbox. It is not possible to have this done conditionally, only true or false.

- Is it possible to start a discovery and UCMDB sync from within Service Manager for change verification?
  - Not at this time.

- Can I use the CI Wizard to create many instances of a baseline CI?
  - One at a time.

- If a CI such as a desktop adds more memory such that it doesn't match the original baseline, can I tie it to a new baseline to specify what it should now match going forward?
  - You can create a new version of the original baseline with more memory and assign the new version to the CI.

- If a CI such as a desktop adds more memory so that it doesn't match the original baseline and I accept the change, will it be "disconnected" from the baseline once I accept the variance, or will I continue to get notifications or unplanned change records saying it is out of compliance with the original baseline?
  - It will still be assigned to the original baseline, but the managed state and baseline will be out of sync, showing in both the view of CIs out of sync with their baseline and showing on the baseline tab within the CI. There will be no unplanned changes opened, since the integration between UCMDB and Service Manager look for unplanned changes against the managed state, not the baseline.

- Is comparison of attributes to a baseline done on a scheduled basis and how often by default? Can I configure it to run only after I update a baseline and only on those specific CI's referencing that baseline vs. all of the CI's in the Service Manager device table?
  - The sync between UCMDB and Service Manager can be done manually or on a scheduled basis. It cannot be triggered from within Service Manager after update of a baseline or update of a CI, it needs to be triggered from the UCMDB.

- If I am truly integrating with ED, there are many attributes that I'd like to map and it seems tedious to add them to the host CI type and to the xslt file one at a time. Do we have a default or an example that includes most of the typical fields we would sync with our current ED-SM C-IT scenario already defined in the host type and added to the xslt file?
  - We do not have an example other than the out-of-box integration. Planning of the integration should be done ahead of time and all fields can be added to the xslt at once, then running the JBOSS script to refresh.

- Is comparison of attributes to Actual State done on a scheduled basis and how often by default? Can I configure it to run only after an update comes from UCMDB and only on those specific CI's vs. all of the CI's in the SC Device table?
  - The sync can be done on a scheduled basis using the UCMDB scheduler. How often it is run depends on how the scheduler is set up. Which CI Types are synced is defined in the data store. You can create one or multiple data stores per connection. Typically you create one data store per integration, but can create multiple.

- What is an example of a use case where the DEM Rules should delete a CI record?
  - When a server is not found via an ED scan, it should be removed from the UCMDB and Service Manager. Servers should always be available vs. a laptop that can be plugged in or not.

- If the update to the CI is changing the relationships, do we delete the old relationships and replace with the relationships coming from UCMDB?
  - Relationships can be updated via sync with the UCMDB.

- In your example of a denied data modification event, will you continue to get a new change over and over telling you that the actual data doesn't match the authorized CI data?
  - Part of denying an unplanned change is undoing the change. Until the change is undone, the original change record is still open and no new change is opened. Once the change is closed, if the data was not changed back to the original state before the unplanned change, a new one will be opened.

- If multiple attributes in the Actual State don't match, do I get one change for all attributes for one CI or a separate change for each attribute?
  - There will be one change for all attributes that don't match after the sync.

- I'm confused by the lifecycle of status in the Data Modification Events vs. the status of the attribute changes in the Change record. I saw discovered, proposed, planned, pre-validation, processed, or denied in the Data Modification event. Then in the CI attributes in the change I saw proposed, and then either planned (which implies has been approved) or denied, implemented, then validated. Then after closure of the Change Evaluation phase they went to processed. What are all of the statuses and when/how are they used in the lifecycle of a use case?
  - The below table shows the possible status values and their use:

Status	Use
Discovered	The change was discovered via UCMDB sync
Denied	The change was denied in Change Management
Planned	The change was approved and is now planned to be implemented
Processed	The change was implemented and verified
Pre-Validated	The change was implemented and validated before the change record was in the evaluation phase.
Proposed	Requested attribute changes were entered via Change Management
Implemented	The change was performed by a change implementer
Validated	The change was validated by the UCMDB

- The change category of Hardware that you showed had the Close button vs. the Next Phase. Isn't this button labeled as Next Phase OOB with SM 7.10?
  - The out of box system still uses the Close label for the button. Some systems are tailored to call it Next Phase instead.

- When I have several attributes to change from planned to implemented, can I use a Mass Update?
  - Each attribute has to be updated individually.

- In the demo, it appeared that once all the attributes were implemented, it automatically took you to the next phase of Change Verification. What if you made a mistake on the last attribute and meant to leave it planned or cancelled?
  - In the case of a mistake you can use the options menu to get back to the previous phase.

- Why would a Service Manager user want to launch in UCMDB and deal with a new GUI, when they should just be able to look at the Actual tab on that CI record to see the results of the discovery?
  - Only during a sync (moving data from UCMDB to SM) is the Discovery Event Manager executed that performs all the actions needed for change verification. The Actual State tab only displays data that is stored in the UCMDB or ED without moving data into Service Manager.

- Who is the user that you envision launching an adhoc diff replication, a config manager for that CI type or the change implementer like a server admin that just took the memory out of the system?
  - In a life implementation, I assume a replication is run on a scheduled basis, for example once a day. Otherwise the configuration manager would typically have the right to run the UCMDB diff replication.

- When you ask for an ad hoc diff replication, how does it know what scope to search for diffs?
  - The scope is defined in the data store. The data store defines which TQLs to execute on replication.

- You say the ad hoc diff will take a while? Have we done testing to determine what factors impact performance and what type of throughput we should expect? For example, if we roll out 300 PCs, how long will that take to get synced back in SM?
  - We do not have performance data at this time.

Client

Summary of new Features

- Web Client:
  - Scale to window
  - Same right-click behavior as windows client
- Attachment (de)compression on client only

Questions and Answers

- The hover sub form, is it a virtual join or a sub form or both?
  - It is a virtual join

- Web client doesn't show the question mark. Does it still work?
  - Yes.

- Questions on list builder widget:

  Can you move values back from right to left?
  - Yes.

  Will it work on a structure of arrays?
  - Just on a single array.

  What can the input on the left side be?
  - DVD, hard coded, variables

  Can you guard against duplicates on the left?
  - Yes

  A value is not in the list on the left – how do you remove it?
  - Move it from right to left.

  If you double click, will it move it to the right?
  - No

  Can this be an enhancement?
  - Yes

  Can you select multiple?
  - No

  Can it support hierarchy?
  - No

  Can you drag and drop?
  - No

- Is there any plan to make the sort menu items alphabetically a server setting instead of a client setting so that it can be set globally?
  - Not at this time as it is generated by the client binaries. You could package the client with that set.

- What forms have the hover sub form implemented out-of-box?
  - None

- Can you copy/past from the hover popup?
  - Yes

- Can you change the length of the fields in the hover sub form?

– Yes, by increasing the lengths of the fields in forms designer.

- Can we display lists in a hover sub form?
  – No, but hope to have this in future.

- Can you do a popup within a popup?
  – No, it's a virtual join and you cannot call a virtual join from another virtual join.

- Is the strategy to move to web entirely?
  – Yes, not this particular web client necessarily though.

- Can we still see the query behind the chart?
  – Yes, under the chart properties.

- With the JavaScript will the attachments still be compressed?
  – Yes, attachments have always been stored compressed

- Can the attachment be uncompressed by any other external product?
  – Yes but not read. Only SM can read it.

- Why was the advanced debugger remove?
  – The advanced debugger was supposed to help in debugging JavaScript, but we couldn't get it to work. We took a poll to see who was using it and the result was that no one was using it, which prompted the decision to stop to try to make it work.

  – Alternatively use print statements for JavaScript and RTM:3 for debugging SM.

- Does DVD in windows and web work the same?
  – Yes

- Is hard tab stop working in web client in 7.10?
  – Yes, it is. You need to set the web.xml setting for

```
<init-param>
  <param-name>useservertabs</param-name>
  <param-value>true</param-value>
</init-param>
```

From the default (false) to true.

- Are the calendar fill widgets smarter getting date and time?
  - Yes, they have changed. .Filling in today's date uses the tod() function, filling in future and past dates uses midnight of the selected date.

- Is it possible to use the SM 7.10 web client against an older version of the Service Manager server?
  - No, due to the new attachment handling it is impossible to use any SM 7.10 client with an older version of Service Manager.

- Will either system definition or dbdict be discontinued in the future? Which one should be used?
  - Both methods are supported going forward and should be interchangeable.

- Is the client look and feel different?
  - The clients look similar with some new features.

- Are there any improvements to the Web client in regards to performance?
  - We are constantly working on performance. It is important to have the web servers close to the web clients or use proxies where you can putting the proxy servers as close to the end client as possible. The distance between the web server and SM server is not as important. Keep forms as small as possible, which includes using only small catalog images or no images at all, since they add to the overall size of the form.

- Which field types are available on dynamic sub forms (XML based)?
  - Text, Multiline Text, Radio button, Checkbox

- Does the reconnect work on the client when the network connection was lost?
  - As long as the session still exists on the server (connection was not dropped from the server side due to heartbeat or error), the reconnect will work.

- Is it possible to change the format used on File – Print without changing the display format?
  - No.

- Does the hover sub form query for only the fields on the form when selected, or does it do a SELECT *?
  - Yes, links and hover sub forms perform a SELECT * statement (log excerpt below)

```
_prepare:SELECT * FROM CONTCTSM1 WHERE "CONTACT_NAME"=:SM_NAME_0
_ociBindQuery:SELECT * FROM CONTCTSM1 WHERE "CONTACT_NAME"=:SM_NAME_0
sqociSelect - EXECUTE:SELECT * FROM CONTCTSM1 WHERE
"CONTACT_NAME"=:SM_NAME_0
```

```
RTE D DBFIND^F^contacts(oracle10)^1^0.000000^
^1^0.000000^"contact.name="AARON, JIM""^ ^0.000000^0.000000
```

- Can a virus scanner that scans information coming through a firewall scan the content of Service Manager attachments or are they in proprietary format when sent over the network?
  – The attachment data is stored in binary rc format and cannot be read like a word document by a virus scanner.

- The checkbox to not sort alphabetically on the navigation menu is only applicable to the windows client. How do you set it on the Web client?
  – In the web.xml set the

```
<!-- Control sorting of the system navigator  -->
  <context-param>
   <param-name>sortNavItems</param-name>
   <param-value>true</param-value>
 </context-param>
```

  – setting to false to sort by menu sort order.

Server

Summary of new Features

- Changes to RDBMS interface
- Changes to scalability
- Changes for more stability

Questions and Answers

- Is there a new server sizing guide coming out?
  – Yes. Use the SM 7.0 server sizing guide as a guideline until then.

- Is it still necessary to restart after making changes to the WSDL configuration?
  – You no longer need to restart after extaccess record changes.

- Can you have multiple attachments with older clients?
  – Multiple attachments needs 7.10 clients

- What does the dryrun parameter do?
  – The dryrun parameter should be used with a predetermined (LoadRunner) script representing a typical user's activity. It returns the peak memory usage for 1 user that can then be multiplied by the number of users to calculate the total memory need for this system. You should use dryrun after making sure that memdebug returns no memory leaks and report any memory leaks found to support.

- Where can we find information on lightweight Single Sign-on (LW-SSO)
  - LW-SSO is described in the BAC documentation and can be used for the RCA integration as well. The API is internal to HP, not for 3rd party (use regular SSO). At this point there are no plans to make it available for partners for integrating their products to Service Manager.

- Have there been changes to the support of case insensitive Oracle?
  - No. There are too many setting to set Oracle to case insensitive properly, so if you forgot one setting you encountered many problems in Service Manager. As a result, Service Manager does not support Oracle in case insensitive at all.

- Is there a report that can be run to look at java memory usage?
  - There is no report that gives the current java memory usage of a servlet. When a servlet reaches 90% memory usage, a message is written to the log file.

- Is the recordtestscript parameter now formally documented?
  - No.

- Does the new Web Services URL have any effect on what you can use with Connect-It?
  - You can use both depending on the attachments you need. The functionality of sc62server/PWS remains the same as it was since 6.2 for backward compatibility. The SM/7 URL also offers identical functionality with the exception that the attachment is based on MTOM vs. MIME.

- Is there a white paper on the load testing?
  - The Diagnostic and Tuning paper will be updated.

- The dryrun parameter assumes a dedicated service not VM?
  - You need to make sure that enough memory is available for SM as well as VM.

- Is LW-SSO the symphony product?
  - Yes

- Can a servlet be restarted in the background?
  - No, restarting a servlet after the Service Manager service is already running must be done in the foreground, meaning in the context of the logged in user. You can start extra servlets if sufficient physical memory is available. This is not an issue on UNIX.

- When the RDBMS was clustered in SC 5 and SC 6, switching to the other RDBMS machine required a restart of ServiceCenter. Is this still the case?
  - When the RDBMS cluster switches over it sends a specific code to SM. If the Service Manager server is aware of the code sent, it will switch over correctly (Oracle RAC does work). If this switch over does not work automatically, send the detailed message that the database sent to support for development as the message is needed to update the Service Manager server code. Note: We do not support Oracle TAF.

- Does memdebug:400 work on HPUX?
  - No, just memdebug:1. Memdebug:400 works on all other operating systems.

- When an alias to an existing field is added to the dbdict, it used to perform a full table copy. Has this changed?
  - There was a ticket opened against this. In a test it did not do a full table copy in SM 7.10. We are allowing an increased amount of manipulation of the database. If the user has the rights, we will allow the changes to the tables. If the user has insufficient rights, we will create the DDL.

- Does attachment compression happen only in the transmission or are they stored compressed?
  - They have always been stored compressed. In SM 7.10 now only the client does the uncompressing.

- What are the ramifications of SM 7.10 binaries with 7.0 applications
  - We know of some features that won't work on SM 7.0 applications with 7.10 binaries. Target is to get this working in SM 7.11.

- When shutdown the service now it waits until everything is down?
  - We did some work to properly stop all the servlets on shutdown.

- Are there any n-type (UTF-16) mapped fields in the out-of-box-system?
  - The fields in svcDisplay use the UTF-16 n-type mappings.

- Was NVARCHAR used in SQL Server prior to SM 7.10?
  - Yes, it was available in SQL server, but not the other supported RDBMS's

- Will the upgrade change field mappings from varchar to nvarchar?
  - No, old mappings stay the same.

- Is it possible to connect to multiple different RDBMS instances?
  - Yes, it is possible on all operating system platforms and all databases, including SQL Server.

- Is it possible to remap a table within the same RDBMS instance or do you need a second instance for that, for example when changing most varchar fields to nvarchar?
  - When remapping a table with the utility, it will create a temporary table within the same RDBMS instance, copy the data to the temporary table with the new mapping, delete the old table and then rename the temporary table to the correct table name.

- Is there support for any version of DB2/MVS anymore?
  - No.

- Do you still need the fastcounters parameter in connection with the batchcounts in the number and counters tables?
  - No, the fastcounters parameter is no longer needed. Adding a number to the batchcount field automatically enables fastcounters.

- Is the current recommendation still 30 threads per process?
  - The recommendations concerning threads per process have not changed. The resilience changes in SM 7.10 may enable you to increase the number, since the servlets stop accepting connections when running low on resources, but you still need to have sufficient servlets running to support your demand. The recommendation is 30 on Windows 32-bit and 50 on other supported OS' including Windows 64-bit.

- Does the maxprocesses parameter still work in connection with the list of http and https ports in the sm.ini?
  - Yes, but we found some issues with using the port range in the sm.ini versus the servlet definition in the sm.cfg and our recommendation has been use the sm.cfg setting rather than the sm.ini setting. We have decided to remove maxprocesses and the httpPorts and httpsPort parameter in a future version of Service Manager.

- What happens when the load balancer crashes?
  - No one can connect through the load Balancer any longer. Existing connections are fine.

- What happens if a servlet crashes?
  - The users connected to this servlet loose their session and need to re-login.

- Does locking work in Horizontal Scaling?
  - Yes, locks are communicated between the machines via udp.

- Where should background processes run in a horizontally scaled system?

- For high availability it is best to run them on the load balancer machine and have the load balancer system be on a clustered machine for failovers. You can use the Anubis process to ensure that single background processes get restarted in case of failure.

- What is the difference between debugserver and enablecoredump?
  - Debugserver is no longer used. Enablecoredump is used on all platforms.

- Do the old AXIS samples work with new WebServices URLs?
  - There are two sets of samples in SM 7.10: SC6 has Axis and dot net based samples. SM7 has Axis 2 based samples including a sample showing attachment support.

- Does the compress / uncompress of attachments increase the network load?
  - No.

- Do attachment names support special characters?
  - They should provided the sql mapping was done correctly.

- Does the client support drag and drop of attachments?
  - The windows client does, the web client does not.

- Is the dryrun parameter documented in the help server?
  - Yes, it is.

- What is the recommended setting for NLS_LENGTH_SEMANTICS in Oracle?
  - BYTE is recommended, but CHAR works as well.

- When changing the mapping from varchar(5) to nvarchar(5), will Service Manager adjust the buffers accordingly?
  - Yes.

- Is there any tracing of JGroup traffic when a servlet start up and communicates with the LoadBalancer?
  - None that we are aware of. TCPMON may help.

- Do we have network load tests for publishing?
  - Not at this point.

- Is there a way to quiesce a servlet before shutting it down? So basically wait for existing clients to disconnect and tell the load balancer not to direct any new clients to that servlet until further notice? If we just shutdown a server, won't we in effect kill all the sessions and they will lose any unsaved data?
  - You can either quiesce all processes in a group or all processes on a machine. It is not possible to quiesce only a single process on a machine.

- I'm not clear on the RAD threads being limited to 5 tabs as an example. Does that mean if I have more than 5 tabs, those after 5 have to access the DB again to populate data?
  - If you attempt to open more than the 5 allowed, you will get a message indicating you cannot open more RAD threads and to please close some tabs. In the case of a script running, this will probably cause the script to error out.

Knowledge Management

Summary of new Features

- Search within results
- Background indexing with ability to stop and restart

Questions and Answers

- Is the Search Engine shipped on the same CD as SM?
  - The search engine is the SM 7.00 search engine which needs to be downloaded separately.

- How do you successfully install and configure the Search Engine / Knowledge Management on first installation?
  - The easiest way is to start initially with all background processes off, then set all settings in the Knowledge Management environment record and restart with background processes running.
  - If the background processes were running prior to setting the Knowledge Management environment, the KMUpdate schedule record will fail and the KMUpdate process is in an unstable state. To work around this issue, first kill the KMUpdate process from the system status screen (may need several attempts), then go to the schedule table, search for scheduled class=KMUpdate, add KMUpdate to the class field, change the status to rescheduled and set the expiration time to a time in the past. Save the schedule record. Set all the settings in the Knowledge Management environment record, log out from the client, log in again and restart the KMUpdate process. All will work correctly then.
  - The issue with the KMUpdate process failing if the environment settings were not done in time and will be fixed in a later release

- The KM search engine is quite old. Are there any plans to change it in the future?
  - The search engine is the same as for SM 7.0. We are looking at a newer search engine but don’t know yet what it will be nor new features.

- When will Knowledge Management integrate with dynamic html (K2 spider)?
  – Service Manager is still using an older version of the search engine, and we are not leveraging all of the search engine capabilities on purpose. If we can add functionality without breaking current engine, we may do so. We will replace the current K2 engine in a future version, but are not sure which new feature functionality will be introduced at this point.

- When is search within results going to be available on the HP support website?
  – The support system will need to be upgraded to SM 7.10 first. We are not aware of current plans to do so at this time.

- Is the Documentation missing the knowledge management environment record configuration?
  – No, you can find it under knowledge management environment. It is not in the install documentation.

- If indexing is stopped at 500, will these 500 records be searchable?
  – Yes

- Any changes in the KCS roles or workflow?
  – No, they are all the same.

- Is there any process for reviewing feedback for KM?
  – Nothing new from before.

- Any new versions of Adobe or Office that are not compatible for indexing attachments?
  – Not that we are aware.

Application Upgrade

Summary of new Features

- More efficient data load
- Using alter table instead of full table copies wherever possible
- Merge Utility

Questions and Answers

- Is there any issue with upgrading from SM 7.01 IIA?
  – The upgrade to SM 7.10 includes IIA.

- When to use the merge utility?

- The merge utility is used for the conflict resolution process. The merge utility works best for single fields such as JavaScript. It can be used for more complex applications such as FormatControl, formats or menus, but unless the merge all is used, they must be used with caution, since many elements need to be changed at the same time. For these, it may be best to determine the differences with the merge utility and do the reconciliation in the tool (such as formatcontrol) itself. The direction of the merge utility is based on the preference chosen at beginning of upgrade (use existing or use new)

- Will the Change Calendar be replaced with Release Control
  - RCA contains a change calendar that will work better for most customers. In SM 7.10, it is no longer possible to create a new change from within the Change Calendar, just schedule existing changes.

- Can you unload a dbdict with SQL mapping using the unload script utility?
  - Unload dbdict with SQL mapping via the script utility is new in SM 7.10

- Does the merge utility work with link records or Process records?
  - It can be used for it, but it may be easier to use it to find out what changed and then look at these changes using the link utility or the Process record itself.

- Can the merge utility be used for revisions?
  - Currently it is hard coded for the upgrade conflict resolution only.

- Can you explain the migration concerns between SM 7.0x and SM 7.10 a little more? Does it affect any of current integrations means with OVO, TeMIP etc?
  - In some cases you may have to upgrade your integrations as well it but shouldn't affect any tailoring. For example, if you use the Connect-It web services connector, you will work but if not, it is version specific.

- Can you do a binary upgrade only from SM 7.01 to SM 7.10?
  - No, the SM 7.10 binaries are not compatible with SM 7.0 applications. You either need to wait for SM 7.11 or do a binary and application upgrade. The application upgrade works with SM 7.10 binaries.

- What is the upgrade path from SC 6.2? Do you have to go via SM 7.00?
  - SC 6.2 can upgrade directly to SM 7.10

- Is there any difference if I used the upgrade utility or just manually apply the changes?
  - If you just installed with not much data or customization, you could do an unload/load. The difference with the upgrade utility is that it does a compare and reports the changes and gives you options to merge old/new and make decisions on what to keep.

- Is Blueprint going to cause additional conflicts?
  - Blueprint is not an out-of-box data, so it may report conflicts.

Miscellaneous

- Is localization available with 7.10?
  - 90 days after release of 7.10.

- Have all the identified bugs in SM7 been fixed in SM7.10? (e.g. Horizontal scaling broken,…)
  - Check the release notes for more information.

- Crystal Report – when will it be available?
  - 7.11 ish.

- Why is HP still persisting with Crystal Reports when DC is available?
  - DC is more than most customers need. They just want to be able to run a report without all of the analytics, etc.

- If you are on an RDBMS, can't you use any reporting tool that you want?
  - Yes, for all non-binary fields. Cannot report on BLOBs from the RDBMS

- Who uses Report Center anymore?
  - Not many which is why we are not working on it.

- Can we get a copy of Report Center?
  - It's no longer supported and would require a license.

- Can they get a Crystal license even if it's not bundled with 7.10?
  - Not sure at this time.

- The biggest usability change of SM6 to SM7 is the removal of the old-style menus. Is there any documentation on how to tailor the Queue drop down to get more tables added to the queues?
  - Not sure if it is documented.

- Do Templates now support arrays in structures (several levels deep)?

- No, they still are under the data policy level limitations.

- Is it possible to set up User Administration Mandanten protected for MSPs?
  - Yes, you just have to ensure to use the same protection rules on all linked tables.

- Is it possible to install Service Manager 7.10 without any demo data rather than install all data and then run a purge?
  - Not at this time.

For more information

Please visit the HP Software support Web site at:

http://www.hp.com/managementsoftware/support

This Web site provides contact information and details about the products, services, and support that HP Software offers.

HP Software online software support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued customer, you can benefit by being able to:

- Search for knowledge documents of interest
- Submit and track progress on support cases
- Submit enhancement requests online
- Download software patches
- Manage a support contract
- Look up HP support contacts
- Review information about available services
- Enter discussions with other software customers
- Research and register for software training

Note: Most of the support areas require that you register as an HP Passport user and sign in. Many also require an active support contract.

To find more information about support access levels, go to the following URL:

http://www.hp.com/managementsoftware/access_level

To register for an HP Passport ID, go to the following URL:

http://www.managementsoftware.hp.com/passport-registration.html

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