HP Application Lifecycle Management

Using Enterprise Collaboration in ALM

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1   The Enterprise Collaboration UI in ALM

HP Enterprise Collaboration (EC) is a tool which enables Application Lifecycle Management (ALM) users, and also users outside of ALM, to collaborate across different platforms and communicate through conversations. These conversations are connected to specific entities, such as a single requirement, test, or defect. They can contain simple text, attachments, and facets; where facets are visual representations of specific entities at a given moment.

This document describes the EC UI in ALM and explains how the ALM users can take full advantage of this feature.

EC in ALM

EC is displayed on the right hand side of the ALM screen, inside a fly out panel, for the following modules:

- Requirements
- Test Plan
- Defects

If EC is not being used, it is displayed as a small tab on the right side of the screen:
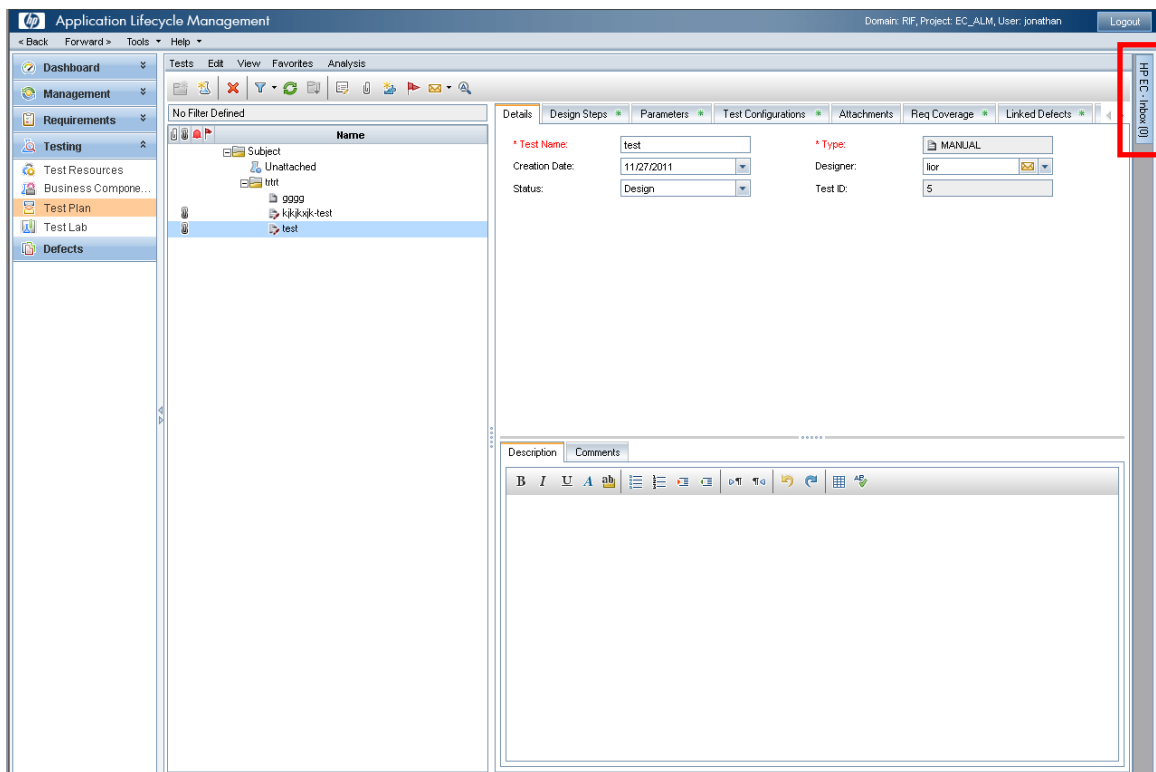
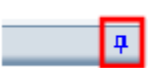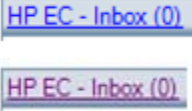Hover over the small tab on the right side of the screen to open EC:
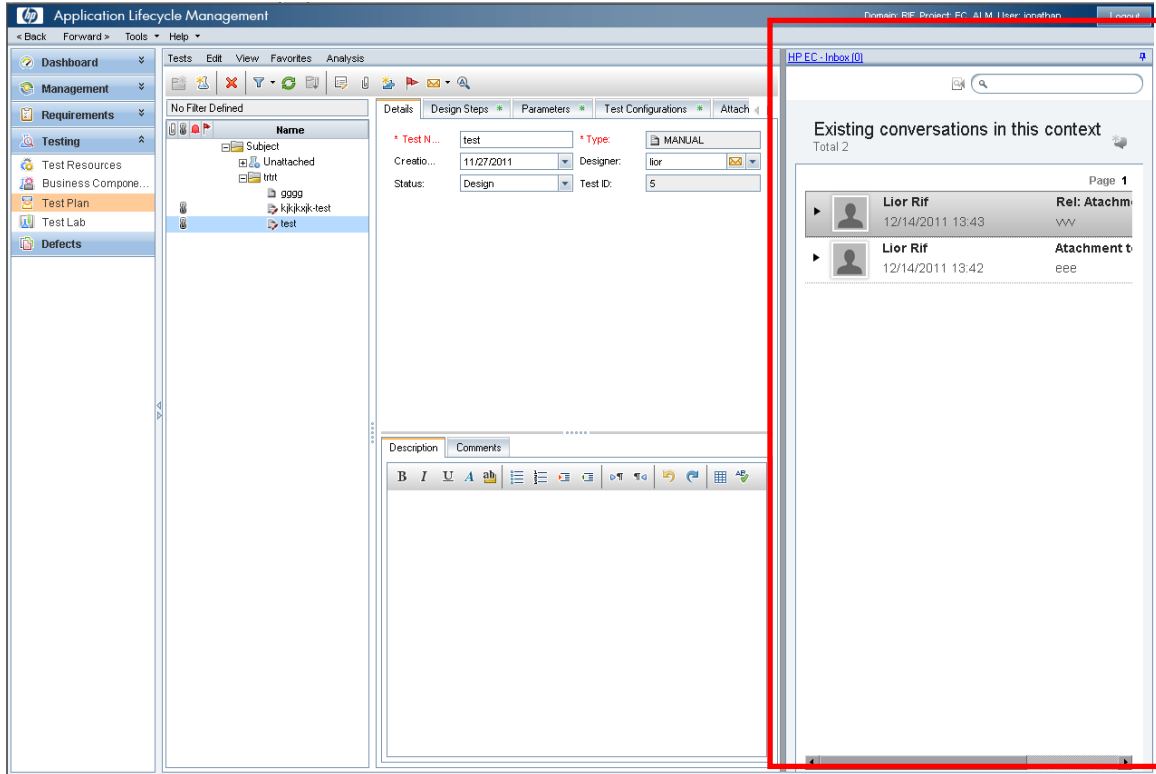
EC is also displayed as a small tab on the right side of the Details dialog box of an entity.
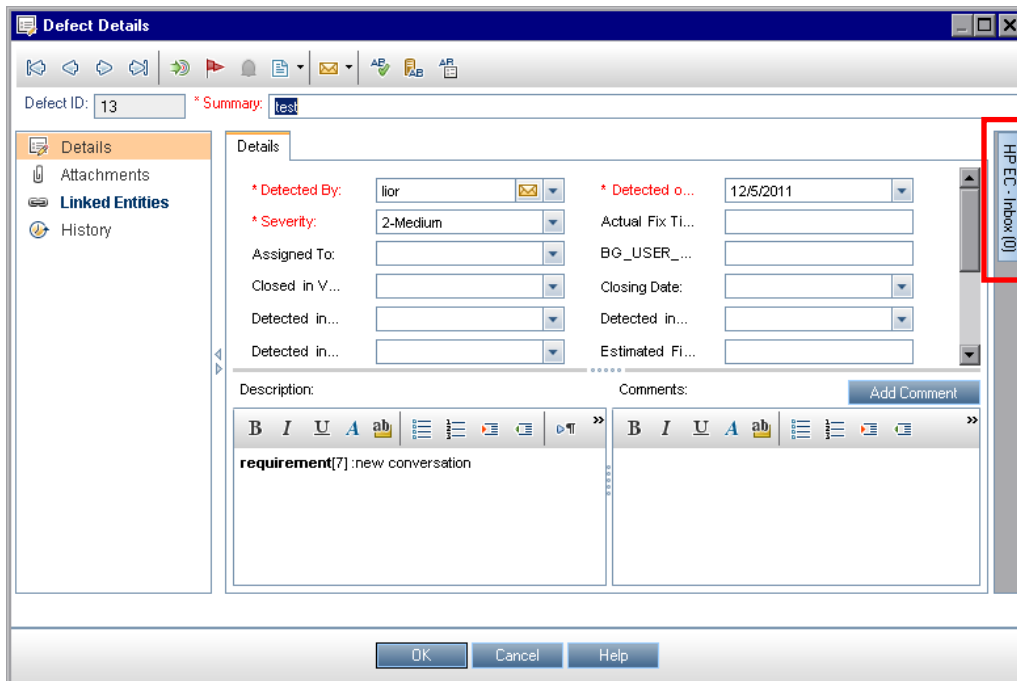
Hover over the small tab on the right hand side of the Details dialog box to open EC:
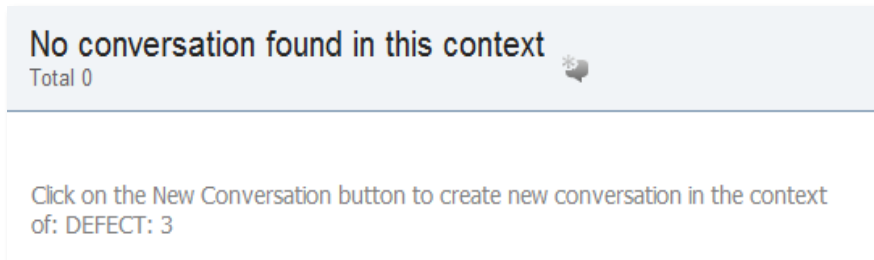

UI elements are described below:

UI Element	Description
	Incoming Messages. When the user receives a new message (either from this or another conversation), it is indicated by changing the text on top of the EC panel, by changing the text in the EC tab, and by changing the color of the tab.
	No Incoming Messages. When the inbox is empty, it is indicated by the text on top of the EC panel and by the text in the EC tab.
	Pinned state. Keeps the EC screen open even if you move the mouse away from the screen.
	Unpinned state. Lets the EC screen collapse when you move the mouse away from the screen.
	EC Inbox before and after being clicked. Opens the EC inbox. The inbox opens inside a new instance of the default browser, single sign on is still implemented so the user will not have to log into the inbox again.

The EC ALM Context Box

When you stand on a supported entity, EC shows a list of conversations which in some way refer to this entity. The options that can be displayed are:

- No conversations
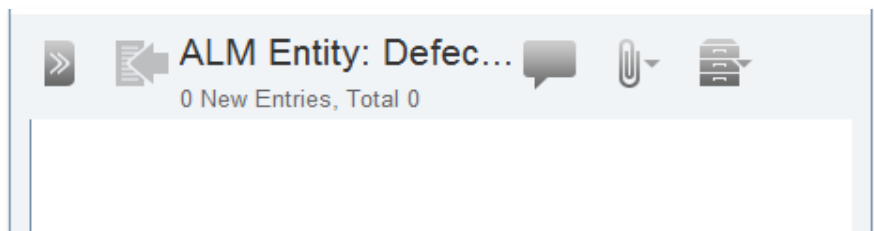- One conversation
- More than one conversation

If there are no conversations that refer to the entity, the following screen is displayed:

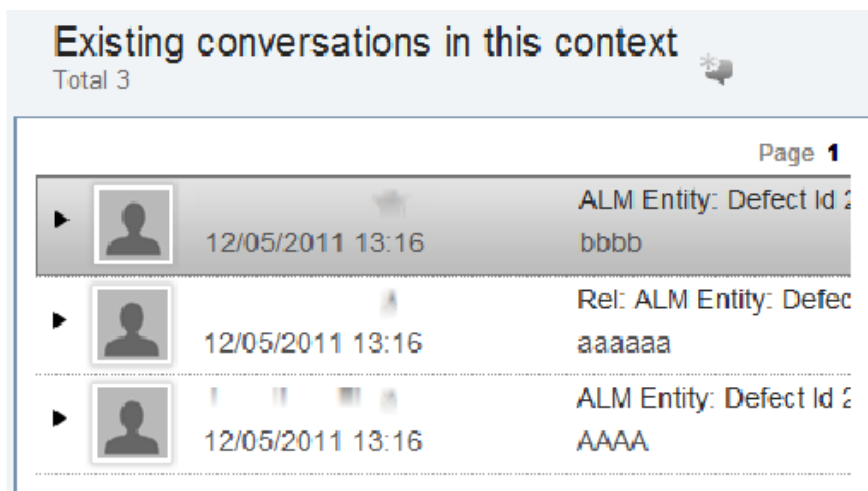If one conversation refers to the entity, or, if you selected **New Conversation** , the following screen is displayed:

If there are several conversations which refer to the entity, the following screen is displayed:

UI elements are described below:

UI Element	Description
	New Conversation. Opens the ALM Entity <entity ID> screen.
	Back to search results. Opens the Search Results screen.
	Search. Finds any conversation containing the word you wrote, but it must be a word that is fully written out, not just a letter or a few letters from a word (it does not have to be a real dictionary word).
	Open details panel. Opens the details panel, which displays Participants, Suggested Participants, and Related Conversations. For details, see Suggested Participants.
	Back to list. Opens the Existing conversations in this context screen.
	Add Post. Opens a new post enabling you to write a text and add facets and attachments.
	Add to conversation. Opens a menu , enabling you to add: • Context Objects and Facets • Attachments For details, see ALM Facets.
	Add to conversation. Adds the entity type to the post.
	Add Attachment. Opens the Add File/URL dialog box.
	Delete Attachment. Deletes the selected attachment from the Attachments dialog box.
	Tools. Opens a menu, enabling you to add: • A New Conversation • A New Related Conversation and enabling you to control: • Conversation Visibility • Participants Control For details, see Tools.

2 Suggested Participants

Using an entity in a conversation from within ALM enables us to use that entity's user fields (such as Assigned to, Detected by, Author…) to suggest participants for the conversation. In order to provide a user as a suggested participant in a conversation, that user must have an email address and be an ALM user.

To access: From the ALM Entity <entity ID> screen, click **Open details panel** .
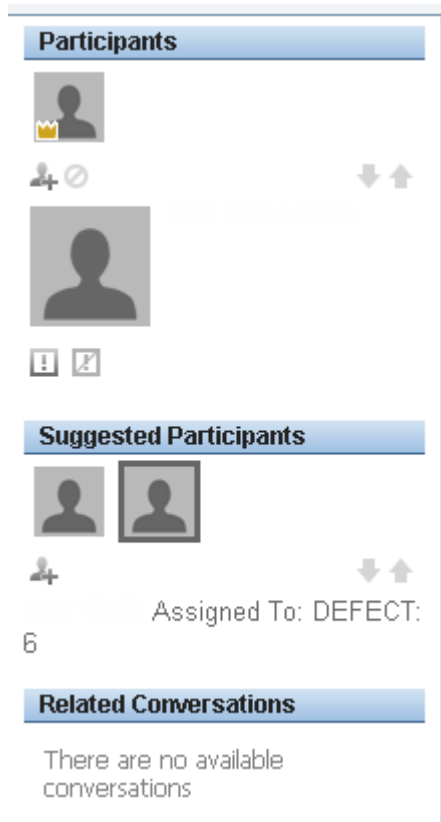
UI elements are described below:

UI Element	Description
	Conversation Owner. The user who started the conversation.
	Add a New Participant. Moves the participant from *Suggested Participants* to *Participants*.

	Remove participants from the conversation. Moves the participant from *Participants* to *Suggested Participants*.
	Next. Goes to the next participant or suggested participant on the list. **Previous.** Goes to the previous participant or suggested participant on the list.
	Set the selected participants as required. Makes the participant High Priority for this conversation, which means the participant receives notification about the conversation by email.
	Required Participant. This participant is High Priority, and receives notification by email regarding this conversation.
	Remove the required status from selected participants. Removes the participant from being considered High Priority for this conversation.

Note: You can add anyone with an email address to your conversation manually; even private individuals outside of ALM who do not have EC. These participants receive the conversation by email and they can reply to the conversation from their private email.

3   ALM Facets

ALM facets enable users to add a visual representation (a read-only widget of the entity at a specific time) of the relevant ALM entity into the conversation, using the EC ALM adapter. The adapter contacts the relevant entity's ALM server and retrieves the relevant fields, which are specified in the ALM adapter's configuration file. For details, see *Enterprise Collaboration for ALM Administrators*.

This section gives instructions how to:

- add a facet to the conversation

- add a facet from a different entity in ALM to the conversation

- add an attachment to a conversation

which are available from the **Add to conversation** menu.

To add a facet to the conversation:

1. Click **New Conversation** . The ALM Entity <entity ID> screen opens.

2. Click **Add Post**. A new mail message opens, enabling you to write a text and add facets as attachments.

   Alternatively, click **Add to conversation** **> Context Object/Facets**.

3. Click **Add Facet**. The Context Object/Facets dialog box opens, displaying a list of possible entities.

4. Click the **Show Facets** arrow. The types of the facet are displayed in a list:

   - <entity> Summary

   - <entity> Detailed

   - <entity> Linked Entities

5. Select the facet you want to add to your conversation and click **Add to conversation** . The facet is added to the new conversation.

6. Click **Submit**. The facet is displayed next to the conversation in the conversations list.
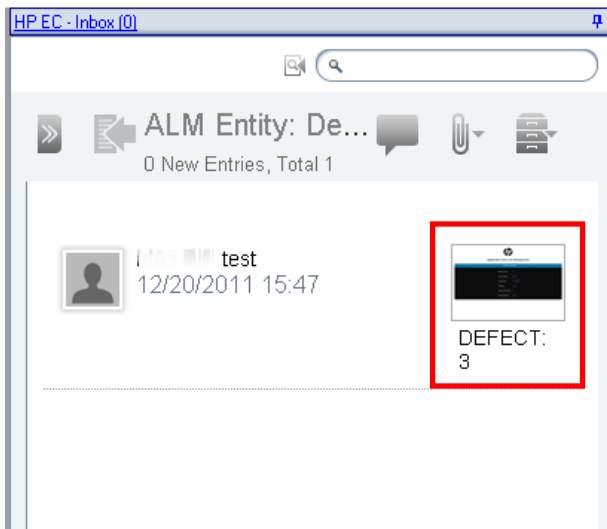
7. (Optional) Double-click the facet to see the details:
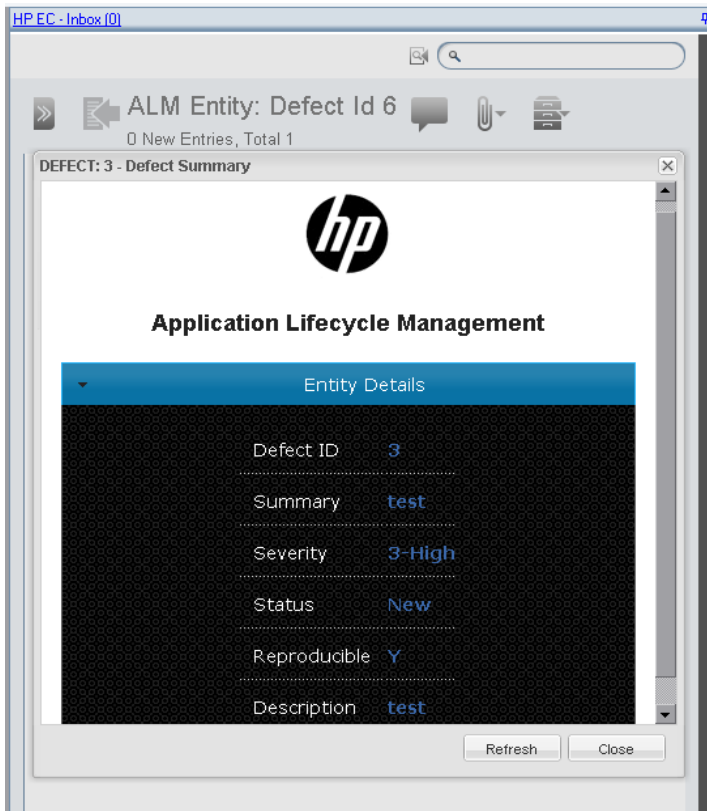
Note: You can only add one facet per post.

To add a facet from a different entity in ALM to the conversation:

1. Click **New Conversation** . The ALM Entity <entity ID> screen opens.

2. Click **Add to conversation** > **Context Object/Facets**. The Context Object/Facets dialog box opens.
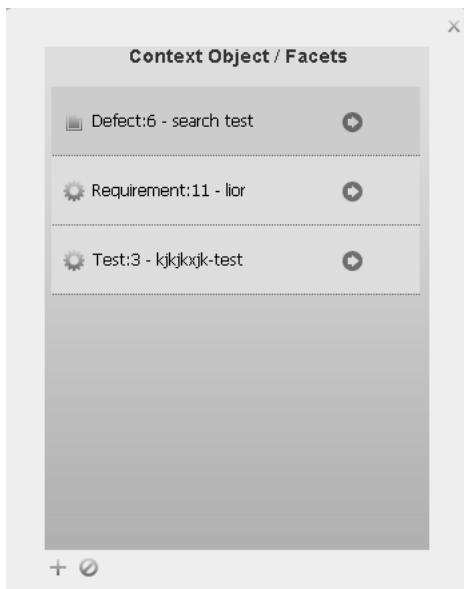
3. Click **Add an Object** + to start a search across different servers, modules, and entities in ALM. The Add a Context Object dialog box opens.
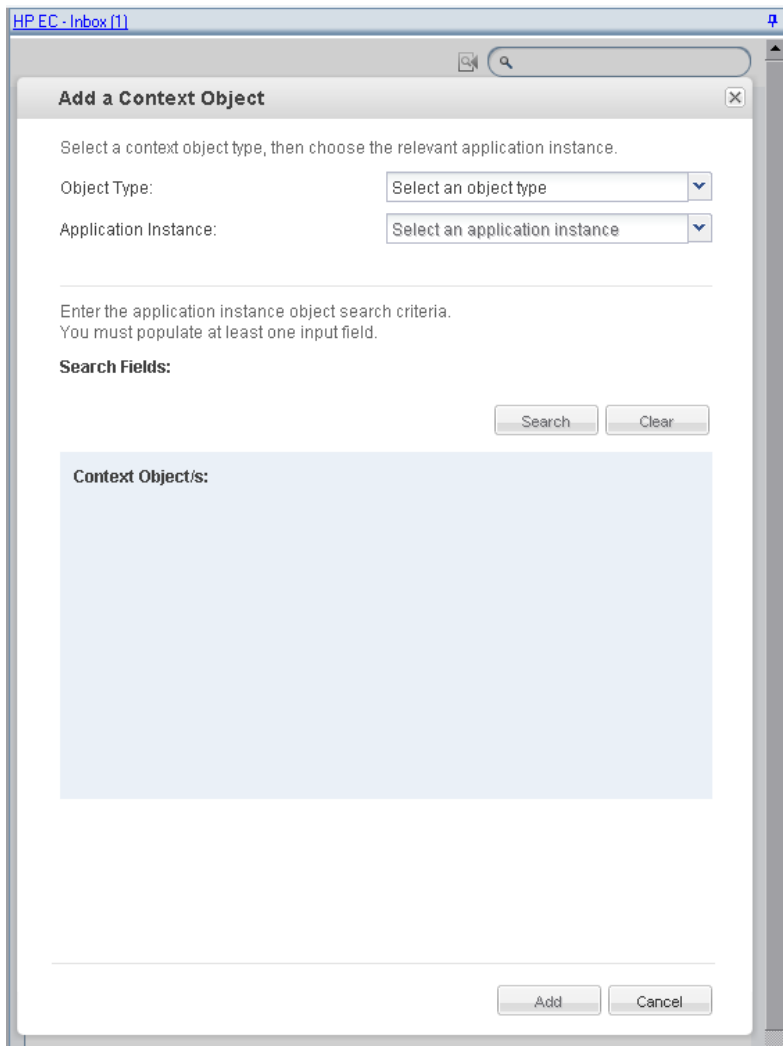
4. In the Object Type field, select an object type.

5. In the Application Instance field, select an application instance. The Search Fields drop-down-lists open.

6. Select a server, domain, and project. You also have the option of entering an <entity> ID or <entity> name.

7. Click **Search**. The Context Object/s area is populated with options.

8. Select an object and click **Add**. The object is added to the Context Object/Facets dialog box.

9. Click the **Show Facets** arrow. The types of the facet are displayed in a list:

- <entity> Summary
- <entity> Detailed
- <entity> Linked Entities

10. Select the facet you want to add to your conversation and click **Add to conversation** . The facet is added to the new conversation.

11. Click **Submit**. The facet is displayed next to the conversation in the conversations list.

To add an attachment to a conversation:

1. Click **New Conversation** . The ALM Entity <entity ID> screen opens.

2. Click **Add to conversation** > **Attachments**. The Attachments dialog box opens.

3. Click **Add Attachment** . The Add File/URL dialog box opens.
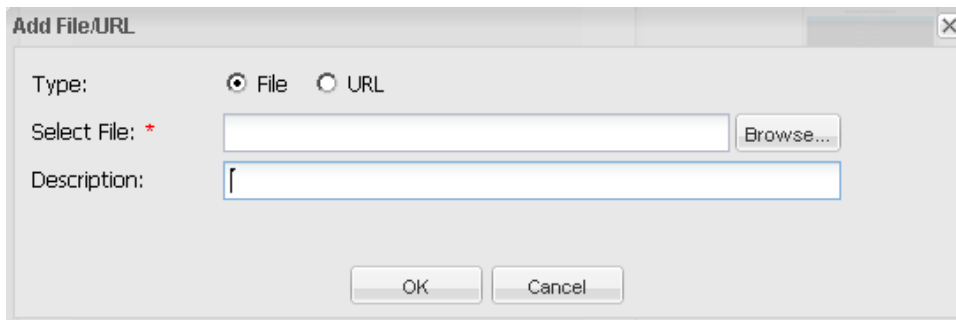
4. Select a type (File or URL).
5. In the Select File/Insert URL field, brows for the file or insert the URL.
6. (Optional) Add a description.
7. Click **OK**. Close the Attachments dialog box. The attachment is added to the conversation.
8. Double-click the ALM Entity ID in the top part of the EC screen and select **Add to conversation** > **Attachments** again. The Attachments dialog box re-opens, displaying the attachment(s) you just added.

4 Tools

This section describes the options available from the Tools menu 　.

- New Conversation
- New Related Conversation
- Conversation Visibility
- Participants Control

New Conversation

Inside each conversation, there can be an unlimited number of posts. When you click **New Conversation** 　, it creates a new empty conversation thread to the existing conversation. When you click **New Conversation** from the Tools menu, it adds a post to the conversation.

If you are standing on a conversation that already contains posts, click the arrow to the far right of that conversation to get to the posts within that conversation. This arrow only appears if there are at least two posts in the conversation (see figure below).
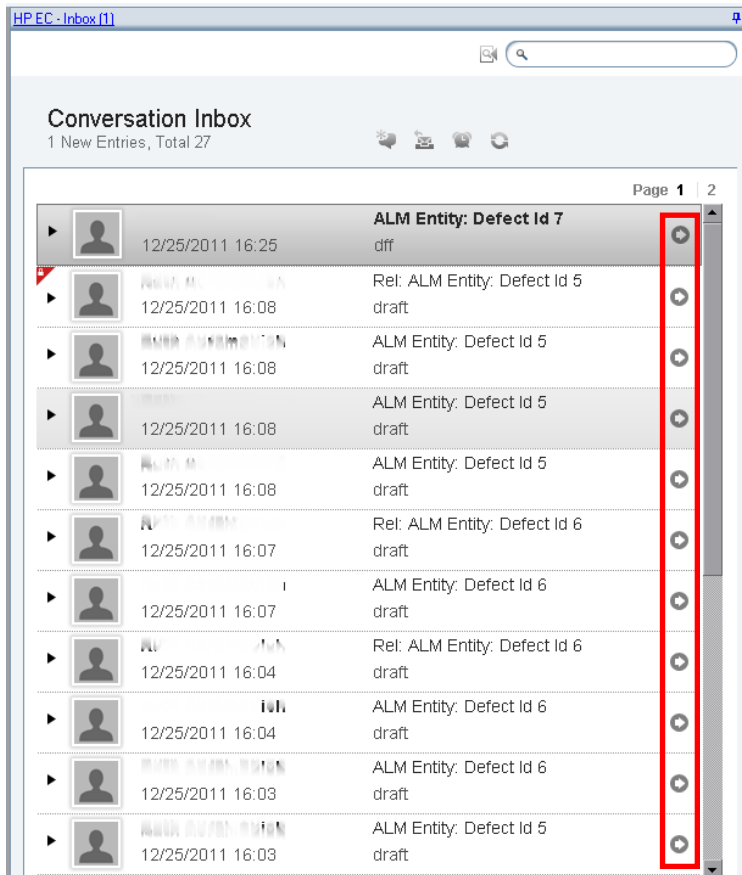
To add a new conversation:

1. Select an entity where at least one conversation already exists.

2. Select **Tools > New Conversation**.

3. Select **Add Post**.

4. Enter text in the text box and (optional) add a facet, attachment, etc. For details, see the procedures in ALM Facets.

5. Click **Submit**. The new conversation is added to the entity.

New Related Conversation

Adding a related conversation to an entity is similar to adding a new conversation to an entity. The related conversations are marked with the letters **Rel:** to show their relation to the original conversation. It is recommended to keep the Participant screen open when creating related conversations.

Related conversations have parent-child relationships. The first related conversation is the child (**Rel:**) of the original conversation, and the related conversation of the child conversation is the grandchild (**Rel:Rel:**) of the original conversation. Each conversation can have unlimited offspring. The Related Conversations area of the Participant screen displays the name of the parent of the open conversation.

To add a new related conversation:

1. Select an entity where at least one conversation already exists.

2. Select **Tools > New Related Conversation**.

3. Select **Add Post**.

4. Enter text in the text box and (optional) add a facet, attachment, etc. For details, see the procedures in ALM Facets.

5. Click **Submit**. The related conversation is added to the entity, and the letters **Rel:** are added to the entity ID.

Since the related conversations might focus on different topics, you might want to change the names of the related conversations to more suitable names.

**To change the name of a conversation:**

1. Place the curser in the <entity> ID on the top of the conversation and double-click.

2. Type a new name for the conversation and click **Save**.

   The name of the conversation is changed.
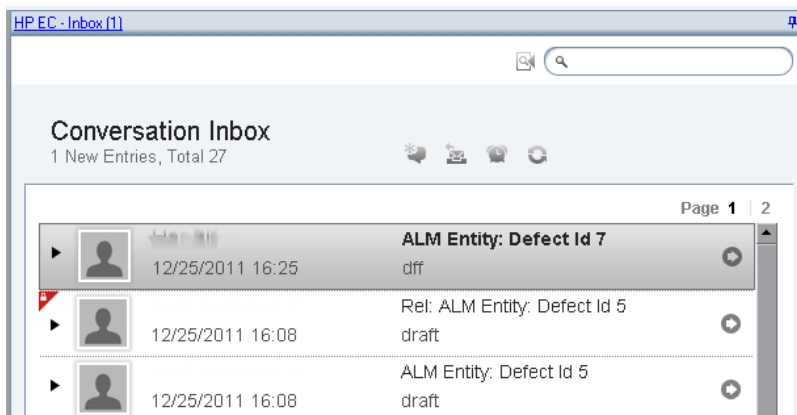
Conversation Visibility

This feature enables you to show conversations to, and hide conversations from, users who are not participants. It is recommended to keep the Participant screen open when hiding and showing conversations, to assist you in selecting which users should be participants.

If you chose to hide the conversation from non-participants, a red lock symbol is displayed by the post and in the conversation inbox.

On the post:
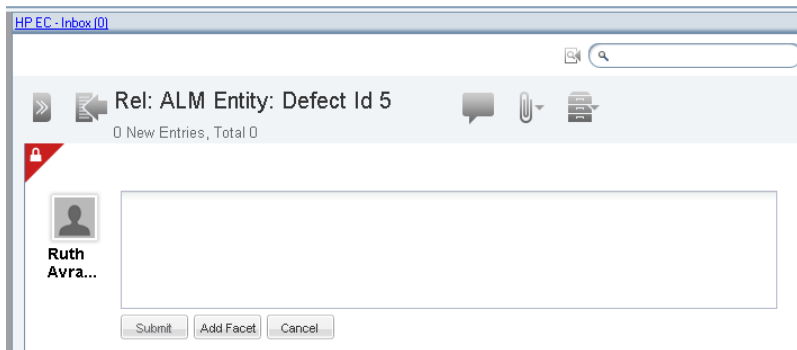
In the conversation inbox:

To hide and show conversations:

- To hide the conversation from non-participants, from the conversation, select **Tools > Conversation Visibility > Participants Only**.

- To allow all users to view the conversation, from the conversation, select **Tools > Conversation Visibility > Public**.

Participants Control

This feature enables you to decide which users can participate in the conversation. Options include:

- **Everyone.** Any user can participate in the conversation.

- **Participants.** Only participants can participate in the conversation.

- **Owner.** Only the owner of the conversation can add new posts to the conversation.

Every user can read the posts in the conversations. The options of inclusion and exclusion determine whether or not other users can add posts, with facets or attachments, to the conversation. If you select **Owner**, all users can view your conversation, but no one but you can add posts or reply to them.

To decide who can add new participants to the conversation:

- To allow any user to participate in the conversation, from the conversation, select **Tools > Participants Control > Everyone**.

- To allow only participants to participate in the conversation, from the conversation, select **Tools > Participants Control > Participants**.

- To allow only the owner to participate in the conversation, from the conversation, select **Tools > Participants Control > Owner**.