HP Service Request Catalog

Software Version: 9.41

For the supported Windows® and UNIX® operating systems

Customization Guide

Legal Notices

Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

Copyright Notice

© 2010 - 2015 Hewlett-Packard Development Company, L.P.

Trademark Notices

Adobe™ is a trademark of Adobe Systems Incorporated.

Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.

UNIX® is a registered trademark of The Open Group.

This product includes an interface of the 'zlib' general purpose compression library, which is Copyright © 1995-2002 Jean-loup Gailly and Mark Adler.

Documentation Updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To check for recent updates or to verify that you are using the most recent edition of a document, go to: https://softwaresupport.hp.com/.

This site requires that you register for an HP Passport and to sign in. To register for an HP Passport ID, click **Register** on the HP Support site or click **Create an Account** on the HP Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

Support

Visit the HP Software Support site at: https://softwaresupport.hp.com.

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

HP Software online 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 support customer, you can benefit by using the support website to:

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

Most of the support areas require that you register as an HP Passport user and to sign in. Many also require a support contract. To register for an HP Passport ID, click **Register** on the HP Support site or click **Create an Account** on the HP Passport login page.

To find more information about access levels, go to: https://softwaresupport.hp.com/web/softwaresupport/access-levels.

HPSW Solutions Catalog accesses the HPSW Integrations and Solutions Catalog portal website. This site enables you to explore HP Product Solutions to meet your business needs, includes a full list of Integrations between HP Products, as well as a listing of ITIL Processes. The URL for this website is https://softwaresupport.hp.com/group/softwaresupport/search-result/-/facetsearch/document/KM01702710.

Contents

Appendix E: Fields available for advanced search

Chapter 1: Overview

There are many aspects of Service Request Catalog which are customizable to your organization. The contents of this Customization Guide are to help you reference the information you are looking for quickly. It is not intended as a step-by-step guide. Instead, each section provides loosely coupled concepts to assist you in achieving an immediate goal, such as enabling knowledge management in Service Request Catalog, configuring approval rights for a user, or customizing the user interface.

Configuration files

There are configuration files that enable you to take advantage of the customization features. From the installation directory structure on the server where you installed Service Request Catalog, the following files are important when you design your customization. You will define a company folder to contain some of these resource files.

Configurable files

File path and name
`...\src\secure\configuration\manifest.xml` Identifies customization resources and settings.
`...\src\resources\client\en\Custom.properties` Localizable property file that contains your customization information.
`...\src\WEB-INF\classes\ApplicationContext.properties`
`...\src\WEB-INF\classes\cacConfiguration.properties`
`...\src\secure\configuration\default\panel.swf`
`...\src\secure\configuration\default\styles.swf`
Note: `Styles.swf` must be generated from the `styles.css` file. For instructions on how to do this, see "Customize the text format" on page 156.

Working with the manifest file

This file contains information about the presentation of the Dashboard and other landing pages for your company. This file also points to other resources that contribute to the look and feel of your user

interface, such as your company name, color palette, and other presentation styles.

The `manifest.xml` file has basic sections for capturing this information.

```
<configuration name="">
        <companyDisplayNameKey>
        <resources>
        <styles>
        <launchersGroup>
        <widgetsGroup>
</configuration>
```

See the for more information about configuring the individual tags in each section.

Use the validator tool for manifest.xml

Service Request Catalog comes with a prepackaged validation tool that you can use to help ensure that your `manifest.xml` file is valid and usable. The validator tool can be found in the Service Request Catalog release .zip package. The vtool consists of the following two script files for Windows and Linux operating systems:

- validator.bat

- validator.sh

For example, you would enter the following command on a Windows system to use the validation tool:

`validate.bat -c "<path>"`

> **Note:** The *<path>* placeholder tag represents the file system path where you have the `manifest.xml` file.

After running this command, you will receive the following message if your `manifest.xml` file is valid:

`"manifest.xml is valid!"`

If your `manifest file` is not valid, you will receive an error message. The following table demonstrates some of the error messages you may receive:

Error: Cannot read manifest file: *<path>*	Description
org.xml.sax.SAXParseException: cvc-datatype-valid.1.2.1: 'abc' is not a valid value for 'integer'.	A string value is present in some elements that requires an in integer value.

Error: Cannot read manifest file: *\<path\>*	Description
org.xml.sax.SAXParseException: cvc-complex-type.2.4.b: The content of element 'configurations' is not complete. One of '{configuration}' is expected.	The *\<configurations\>* parent node must contain at least one *\<configuration\>* child node.
org.xml.sax.SAXParseException: cvc-complex-type.2.4.a: Invalid content was found starting with element 'resources'. One of '{styles, widgetsGroup, launchersGroup}' is expected.	The *\<resources\>* element can contain only one of each of the following: *\<styles\>*, *\<widgetsGroup\>*, *\<launchersGroup\>*
org.xml.sax.SAXParseException: cvc-complex-type.4: Attribute 'displayOn' must appear on element 'launchers'.	The *displayOn* attribute is not present in the *\<launchers\>* element.
org.xml.sax.SAXParseException: cvc-enumeration-valid: Value 'CHOICE' is not facet-valid with respect to enumeration '[TEXT, TEXTAREA, DROPDOWN, HIDDEN]'. It must be a value from the enumeration.	Type of fields in the *\<launcher\>* must be a value from the enumeration [TEXT, TEXTAREA, DROPDOWN, HIDDEN].

Using the Migration Tool

The Service Request Catalog Migration Tool is a dedicated tool to preserve your Service Request Catalog customizations as you migrate to HP Service Manager.

What does the Migration Tool do?

Some files in Service Request Catalog are open for customization. Without the Migration Tool, you must migrate any customizations manually to complete the migration process. Doing this manually exposes the process to potential mistakes. The Migration Tool copies the customized files to the new Service Request Catalog release directly and merges certain customized files into the Service Request Catalog 9.41 release.

Migration Tool usage

$TOOL_HOME refers to the folder to which you extracted this tool.

$SOURCE_SRC refers to the folder in which the older version of Service Request Catalog is deployed and which contains the customizations you wish to migrate.

$TARGET_SRC refers to the folder in which you are deploying the new version of Service Request Catalog.

Linux usage:

To use the migration tool in a Linux operating system, follow these steps:

1. Grant execution permission for `migrateSRC.sh`. To do this, navigate to $TOOL_HOME and then run the following command:

   `chmod u+x bin/migrateSRC.sh`

2. Launch the Migration Tool by running the following command:

   `bin/migrateSRC.sh $SOURCE_SRC $TARGET_SRC`

3. Follow the onscreen instructions to migrate the specific migrations you wish to move to the new version of Service Request Catalog.

Windows usage:

To use the migration tool in a Windows operating system, follow these steps:

1. Double-click the `migrateSRC.bat` file in the `$TOOL_HOME\bin\ directory`.

2. Follow the onscreen instructions to migrate the specific migrations you wish to move to the new version of Service Request Catalog.

Note: Currently, you can use this tool to migrate from Service Request Catalog 1.40, or Service Request Catalog 9.32 or Service Request Catalog 9.33, or Service Request Catalog 9.34, or Service Request Catalog 9.35, or Service Request Catalog 9.40, to Service Request Catalog 9.41.

Chapter 2: Service Request Catalog customization

You can make many changes to brand Service Request Catalog with your own corporate identity. Service Request Catalog allows you to customize the interface through a variety of mechanisms. You can show or hide any of these five primary widgets, or use the launcher to add links to third party Web sites, applications, videos, or anything else you prefer. Read the following sections to learn more about each task:

Interface

For information on how to customize the colors, background, and other graphical related elements of Service Request Catalog, see "Appendix D: Styling the interface" on page 110.

Embed SRC in an HTML frame

If you wish to embed Service Request Catalog within your corporate intranet, you can embed Service Request Catalog within standard HTML Web pages by using the FRAME html tag.

To do this, follow these steps:

1. Open this file with a text editor.

   ```
   C:\...\WEBINF\classes\applicationContext.propertie
   ```

2. Set the value of the following parameter to *true*:

```
src.enableFrame=ture //enables embedding of SRC within standard HTML Web pages
by using the FRAME html tag.
```

By default, the default value of the parameter is *false*, which means that the embedding Service Request Catalog in an HTML frame is disabled.

3. Create a Web page that contains a FRAME element, and then specify the source property of the FRAME tag as the url of your Service Request Catalog installation.

```
<HTML>
<HEAD>
<TITLE>Service Request Catalog</TITLE>
</HEAD>
<FRAMESET rows="25,*" cols="*">
        <FRAME name="Top" src="corporateHeader.html" FRAMEborder=0 noresize
scrolling=no FRAMEspacing=0 border=0>
        <FRAME name="Content"
src="http://<domainname>:<port>/<srcDeploymentName>/secure/main.jsp"
FRAMEborder=0 noresize scrolling=no FRAMEspacing=0 border=0>
</FRAMESET><noframes></noframes>
</HTML>
```

In this example, the *<domainname>* placeholder represents the domain on which you installed Service Request Catalog, the *<port>* placeholder represents the port number that was specified during installation of Service Request Catalog, and the *<srcDeploymentName>* represents the name you used to deploy Service Request Catalog. Therefore, a complete example for a deployed installation of Service Request Catalog may resemble the following:

```
http://myCompany:1701/src/secure/main.jsp
```

> **Note:** The *corporateHeader.html* file that is referenced in the example is an example file that your organization can create to crown the frame that contains Service Request Catalog.

Customize the landing pages

You can specify how many information objects appear in the Dashboard, Services, and Support pages, and their order of appearance. The order is defined in rows that appear left-to-right, and top-to-bottom. For example, you might want to hide the object that lists popular bundles or popular items. There are seven information objects (*widgets*) that can appear on any landing page. The following list describes the name and configuration ID of these widgets.:

- Pending Approvals (APPROVAL_STATUS)

- Request Status (REQUEST_STATUS)

- Popular Items (POPULAR_ITEMS)

- Request On Behalf (REQUEST_ON_BEHALF)

- Assistance (ASSISTANCE)

- Your Subscriptions (SUBSCRIPTION)

- Support (SUPPORT)

To customize the order of appearance of these widgets, follow these steps:

1. In the `manifest.xml` file, locate the `<widgetsGroup></widgetsGroup>` section. Within this
   section, you can configure the number of widgets for each landing page and the display order (left
   to right and top to bottom).

   ```
   - <widgetsGroup>
     + <widgets displayOn="DASHBOARD">
     + <widgets displayOn="SERVICE">
     + <widgets displayOn="SUPPORT">
     </widgetsGroup>
   ```

   There are sub-parameters for each available object.

2. Locate the `<widgets></widgets>` parameter. There are sub-parameters for each available
   object. For example, your `manifest.xml` may resemble the following:

   ```
   <widgets displayOn="pagename">
           <widget displayOrder="1"
           type="APPROVAL_STATUS" visible="true"/>
           <widget displayOrder="2"
           type="REQUEST_STATUS" visible="true"/>
           <widget displayOrder="3"
           type="POPULAR_ITEMS" visible="true"/>
           <widget displayOrder="4"
           type="ASSISTANCE" visible="true"/>
   </widgets>
   ```

3. You cannot change the name of the object, but you can change the order that they appear in by
   changing the number assigned to the object. For example, to make the REQUEST_STATUS object

appear first, change the value of its `displayOrder` attribute from **2** to **1**.

> ○ Make sure to change the order value assigned to APPROVAL_STATUS.
>
> ○ Make sure each object has a unique `displayOrder` value.

4. To hide a widget, change its `visible` attribute from **true** to **false**.

5. Save your changes, but do not close the file until you are done.

Use the launcher to create third party links

The launcher is an empty space directly below the Dashboard, Services, Support, and Subscription menu bar. You can use the launcher to link to third party applications, such as video training links, an Internet search Web site, an internal HR Web site, or a chat support Web application. You can customize the presentation to show just an icon, or you can display a small amount of text with each icon.

To create a third party application launcher that appears on the Dashboard, Support, or Services landing pages, you will need to modify the following two files:

- manifest.xml

- Custom.properties

To create a third party link from the Dashboard, Services, or Support pages, follow these steps.

> **Important note:** In the `manifest.xml` file, there are many xml elements that end with the term "key." Elements that end with the term "key" correspond to a property specified in the `Custom.properties` file. For example, the value of the <titleKey> element in the `manifest.xml` file is specified as "launcher_title" which corresponds to the "launcher_title" property in the `Custom.properties` file.

1. Open this file with a text editor.

   C:\...\src-9.41\resources\client\en\Custom.properties

2. Locate the template example in the file.

3. Follow the directions to copy the template section and paste it below the template. Customize only the pasted section. It is a good idea to add a comment line above the new section to identify its

purpose.

4. Follow the guidelines in the value table to make sure this section contains values that you want to appear in the Service Request Catalog Dashboard.

   ○ The identifier can be user-defined; however, when you edit the `manifest.xml` file, the identifiers have to match.

   ○ The .value for each identifier is exactly what will display in the user interface.

   In this example, we build a launcher for the XYZ third party business application.

   ```
   /* New Launcher Example */
   launcher_title = XYZ
   launcher_desc = You can link to XYZ here.
   dropdown_list_label = Select
   dropdown_value_1 = I want information
   dropdown_value_2 = I want to order
   dropdown_value_x = I want to see status
   text_label = Type Your Comments
   action_label = Send
   action_type = GET
   ```

5. Save the file, but keep it open for reference as you configure the next file.

6. Open this file with a text editor.

   ```
   C:\...\src-9.41\secure\configuration\manifest.xml
   ```

   Use the following lines as a reference for the remaining steps:.

   ```
   <launcher launcherId="XYZ_Launcher" displayOrder="5" showLogoBox="true"
   showLogoDropShadow="true">
       <logo>XYZ_image.png</logo>
       <titleKey>launcher_title</titleKey>
       <descriptionKey>launcher_desc</descriptionKey>
       <launcherType>APP</launcherType>
       <fields>
           <field fieldId="text_label">
               <labelKey>text_label</labelKey>
               <type>TEXT</type>
           </field>
           <field fieldId="text_area">
               <labelKey>text_area</labelKey>
               <type>TEXTAREA</type>
   ```

```
            </field>
            <field fieldId="dropdown_list_label">
                <labelKey>dropdown_list_label</labelKey>
                <type>DROPDOWN</type>
                <options>
                    <option>
                        <labelKey>dropdown_value_1</labelKey>
                        <value>X</value>
                    </option>
                    <option>
                        <labelKey>dropdown_value_2</labelKey>
                        <value>Y</value>
                    </option>
                    <option>
                        <labelKey>dropdown_value_x</labelKey>
                        <value>Z</value>
                    </option>
                </options>
            </field>
        </fields>
        <action>
            <labelKey>action_label</labelKey>
            <link><![CDATA[http://www.XYZ.com]]></link>
            <method>GET</method>
        </action>
    </launcher>
```

7. Locate the `<launchers></launchers>` section. The `<launchers>` element may contain one or more `<launcher></launcher>` sub-sections that describe the attributes of a third party application(s) that you want to display on the Dashboard. Replace the blue italicized text between each tag with a valid value. Follow the guidelines in the value table to make sure this section is syntactically correct and contains values that can be processed successfully.

8. Save the file, but keep it open for reference as you configure the next file.

9. If the application is running, log out and log in again to confirm that the third party application link appears in the dashboard.

- For a detailed example of how to configure the launcher to start a support chat option, see "Example: Add a Bomgar live chat" on page 84

- If you chose to link to use the Launcher to play a video, note that Service Request Catalog uses an open source video player class from Adobe. Therefore acceptable video formats are .flv, .f4v,

and mp4 -based container formats. For more information regarding the video player, reference the following link:

http://help.adobe.com/en_US/flex/using/WSc78f87379113c38b-669905c51221a3b97af-8000.html

Customize error messages

You can customize error messages that appear when you launch third party applications. These messages have default content but you may want to change them. To customize error messages, follow these steps:

Tip: It is always a good idea to make a backup of any system files before you make changes to them. If an error occurs later, you can always return the file to its original state.

1. If necessary, stop the server.

2. Open this file with a text editor:

   C:\...\src-9.41\resources\client\en\Custom.properties

3. Locate this section:

   # Customizable error message properties

4. Each message consists of a property ID that you should not change, and a property value that you can change.

   Property ID Property value

   ```
   default_error_title          = Error
   default_success_title        = Success
   default_error_message        = Message {0}.
   default_success_form_message = Your information is posted.
   ```

   Edit one or all property values as necessary.

5. Save and then close the file.

Hide the service or support tabs

You can show or hide the Service, Support, and Generic Support widgets, including any references to those services in other areas of Service Request Catalog. To hide any of these tabs, set the value of the following parameters to `false` as appropriate. By default, these parameters are shown, which means that the default vales are `true`:

```
src.sm.enableService=false //hides Service tab and hides the Services section from
the Your Requests widget and Request Inbox.
src.sm.enableSupport=false //hides Support tab and hides the Support section from
the Your Requests widget and Request Inbox
src.sm.canRequestGenericSupport=false //hides the generic support widget.
```

> **Note:** You must still hide the Services and Support widgets by using the steps outlined in

Configure the Your Requests and Your Service Request

You can choose to show or hide the Pending, Closed, Denied, or Approved menu items for either the Your Requests widget or the Your Service Request pane. These settings are controlled by the following parameters in the `applicationsContext.properties` file. The default values for these parameters are `true`, which means the menu item will be shown. You can hide an item by setting the appropriate parameter to `false`.

Your Service Requests

```
src.ui.service.enablePendingInbox=true
src.ui.service.enableApprovedInbox=true
src.ui.service.enableClosedInbox=true
src.ui.service.enableDeniedInbox=true
```

Your Requests

```
src.ui.service.enablePendingOnWidget=true
src.ui.service.enableApprovedOnWidget=true
src.ui.service.enableClosedOnWidget=false
src.ui.service.enableDeniedOnWidget=false
```

> **Note:** The Your Requests widget can show a maximum of three of the menu items. This is due to
> the height limitation of the widget.

Customize the application name

You can replace the application name, Service Portal, with the name of your company or a customized application name. For example, you would like the application name to reflect your company branding and your company name is XYZ. To do this, follow these steps:

1. Open this file with a text editor.

   ```
   src\resources\client\en\Custom.properties
   ```

2. Locate the `// Company Display Name` section.

3. Change the name of the default company name to your file name. For example, change:

   ```
   default_company_name_label = Service Central
   ```

   to

   ```
   default_company_name_label = XYZ Company
   ```

   You can change the ID on the left side to some other ID. For example, you could change this:

   ```
   default_company_name_label = XYZ Company
   ```

   to

   ```
   my_company_name = XYZ Company
   ```

4. Save and then close the file.

Edit manifest.xml

The `manifest.xml` file contains a section that identifies the key of the company name to be displayed.

1. Open this file with a text editor:

   ```
   ...\src\secure\configuration\manifest.xml
   ```

2. Locate this section:

   ```
   <companyDisplayNameKey>default_company_name_label
   </companyDisplayNameKey>
   ```

3. If you changed the ID value in `Custom.properties`, make the corresponding change in this file.

Example: Changing `default_company_name_label` to `my_company_name` in the `Custom.properties` file. requires the new ID to appear in the `manifest.xml` file.

```
<companyDisplayNameKey>my_company_name
</companyDisplayNameKey>
```

4. Save `manifest.xml`. The changes will be captured and propagated to all distributed servers the next time the server synchronization scripts run. To see them immediately, log out and log back into your local instance of Service Request Catalog.

Add a new language

Service Request Catalog is delivered in 16 language packages, which can meet most localization requirements. However, if you wish to add additional languages, you can do so on your own by using the following procedure. To do this, you must modify the following two areas:

- The resource files located in the following directory:

  `[release war]\resources\client` and `[release war]\resources\server`.

  All resources, messages, and user interface labels are stored in these properties files.

- Service Manager Server: The resources for configurable items, such as catalog items, user options, and checkout panels are stored here.

Configuration steps

In this example, we convert the current language of Service Request Catalog to Italian.

Add a new language into mlu.properties

1. Find resource under `[release war]\resources\mlu.properties`.

2. Add the language code for key "supportedLanguages":

   supportedLanguages=US,DE,**IT**,FR,ES,JP,BRAZILIAN,ZH,NL,KO,RU,CS,HU,PL,AR,HE

3. Add the following lines for the new language:

   IT.languageId=ITALIAN
   IT.localeLanguage=it

```
IT.localeCountry=IT
IT.displayName=Italiano
```

- If you do not care about using the country code for Italian, just put IT as the language code, and all resource files must be appended as follow:

  abc **it**.properties

- If you do wish to put the country code (for example Switzerland (CH)) as the localeCountry for this language, then all resource properties files must be appended as follow:

  abc **it_CH**.properties

Create a folder for Italian

If you do not care about using the country code for Italian, create a new folder under [release war] \resources\client\ named it as **it**.

If you do wish to put the country code, as the localeCountry for this language, create a new folder under [release war]\resources\client\ named it as **it_CH**.

Copy all client resource files

1. Copy all resource files from the [release war]\resources\client\en folder to the folder that you created in the previous step.

2. Append "_it" or "_it_CH" to each client resource file, according to your decision in the previous step.

Copy all server resource files

1. Copy all server resource files from the [release war]\resources\server\en to the folder the you created previously.

2. Append "_it" or "_it_CH" to each server resource file, according to your decision.

Translate each properties file

1. Translate the property files by hand.

   Please heed those files that are marked by the "DO NOT TRANSLATE THIS FILE" statement; similarly, there are several lines in the files that are marked "DO NOT TRANSLATE." If you are

not sure what lines should be translated or not, you can compare the existing files between a non-English version and the English version.

Localize the resources in HP Service Manager

Service Manager provides extensive language support. For details on how to localize Service Manager, refer to *SM_Open_L10N_UG.pdf*.

Restart Tomcat

1. Restart Tomcat, and then navigate to Service Request Catalog.

2. Set the Browser Language Preference in Service Request Catalog.

Reference Materials

Chapter 3: Service Manager configuration for Service Request Catalog

Some Service Request Catalog customization tasks require you to make changes to the HP Service Manager server to see the result in Service Request Catalog. Make sure you have a Service Manager client that connects to the same server that you use for Service Request Catalog.

Tailoring best practices

Making changes to a Service Request Catalog tailoring configuration can create problems. The best practice recommendation is to invest in a complete pre-production test cycle to be sure you have all the fields you need and that the names of these fields are meaningful to your user community. It is important to know that when these user fields are available and populated with information by users, if you make post-production changes to a tailoring configuration, there is an impact to existing requests.

If I do this	This is the result
Add new fields to an existing configuration.	Existing requests will not display those fields when you check their status.
Remove any (or all) custom fields from an existing configuration and add new ones.	Existing requests will not display the data associated with the deleted fields. The new fields will not appear in those requests. The collected data associated with the deleted fields exists in the Service Manager database, but cannot display in the Service Request Catalog user interface. **Best practice:** Do not remove a custom field once it is used in a production environment.
Add a new field that is mandatory.	Existing requests will not display this field as long as there is no attempt to edit and resubmit a request. If the user resubmits the request, the new mandatory field appears and the user must supply any required information or form validation fails. **Best practice:** Set a default value for new mandatory fields.

Tailoring check-out panels

If you are using Service Request Catalog to submit a catalog or support request, you may want to customize Service Request Catalog to your specific business requirements. You can use a simple Service

Manager wizard to add new custom checkout panels, define custom fields and labels that appear on the Service Request Catalog checkout panels when you submit a request. You can also completely modify all out-of-box checkout panels in the Service Request Catalog user interface.

Checkout panels

In Service Request Catalog, users can submit different types of requests through various navigation paths. Each of these paths brings users to a specific request panel, which is called a checkout panel. The following are the default checkout panels in an out-of-box implementation of Service Request Catalog:

Panel name in SRC user interface	Description
Service Catalog	This checkout panel is used to request for an item that is in the Service Catalog. To access this panel, click the **Services** tab on the Service Request Catalog home page, click **Browse Catalog**, and then browse to a service catalog item/bundle.
Support Catalog	This checkout panel is used to request for an item that is in the Service Catalog. To access this panel, click the **Support** tab on theService Request Catalog home page, click **Browse Catalog**, and then browse to a Support Catalog item/bundle.
General Support	This checkout panel is used to request for an item or service that is not listed in the in the regular Service Catalog or Support Catalog. To access this panel, click the **Support** tab on the Service Request Catalog home page, click **Create**, and then create a custom Support Request.

Note:

You can add custom fields for the three checkout panels. However, for each company, you can create only one configuration for each checkout panel.

If you upgraded from an earlier version of Service Request Catalog by using the Migration Tool, you should note that only a limited migration is performed upon the checkout panel. Therefore, you should verify your checkout panel configuration after the migration, and adjustment as necessary. If you have also corresponding configurations for this company, these configurations are used. If there are no corresponding configurations for this company, the default configuration are used.

Configurations

A checkout panel is defined by a configuration in the Service Request Catalog Tailoring section of Service Manager. A configuration is associated with one or more sections, and each section can contain one or more custom fields that will be added to a Service Request Catalog checkout panel. You must specify a label for each section and field, which will display on the relevant checkout panel in the Service Request Catalog user interface.

Sections

A new section in the checkout panel can have a title and a combination of these objects:

- Fields that exist in a Service Manager table

- Labels that exist in a Service Manager form or a user-defined label

- Radio buttons

- Check boxes

- Lines of text for a user description text box

- Service Manager lookup fields

- Combo boxes

- Date fields

- Number fields

- Time fields*

*Time is usually specified by taking the system from the Service Manager server and adjusting for the clients location by using the GMT adjustment in the user's browser.

Custom fields

Custom fields are useful when you need to gather more information for a certain type of catalog request. Custom fields appear as a new accordion section in the checkout panel after the standard accordion sections for the request type. The data collected from the user with the custom fields is

stored in the appropriate Service Manager table that contains each field. New fields and labels appear in Service Request Catalog as a new section in the checkout panel. You can use this feature to collect additional information from the user that is relevant to the item or service fulfillment business logic.

Notes on creating custom fields

To create a custom field, you must specify the following:

- The checkout panel to which the field belongs

- The section of the checkout panel to which the field belongs

- A label for the field

- User restrictions on the field

- The field type

- Default values for the field, if any

- Mandatory requirements for the field, if any

You can specify the data type for a custom field and Service Manager will validate the user input against that data type and return an error message if there is a mis-match. In this case, the user can try again to provide data that is consistent with the assigned data type.

You must have the SysAdmin capability word in your user profile to access the Service Request Catalog tailoring wizard.

If a custom field was optional, and the user does provide a response or a value, the custom field does not appear in the status view.

Lookup tables and lookup fields

Some fields have a lookup table associated to them because of the business logic in Service Manager. For example, if you want to add a custom field named `City` to a checkout panel, users should not be allowed to type a city name in this field. Instead, users should select a value retrieved from the list of city field values in the location table. To achieve this, specify the location table as the lookup table, and the city field in this table as the lookup field for the custom field.

> **Note:** To use a lookup table and a field, you must specify the **Display Type** of the custom field as **Text**.

You must also specify restrictions on the custom fields to limit the user's ability to change the content of the custom field.

Custom field restrictions

Restriction:	Restriction description:
Read Only	Setting a custom field as read-only means that the user will not be able to modify this field. If no default value is specified, this field will not appear on the checkout panel.
Create Only	Specifying a custom field as create only means that the user can only add the field and its associated information when creating the request. This field will be disabled if the user is viewing their requests.
Create and Update	Create and Update means that user can add the field to their service request, and that this field can also be updated from the Service Request Catalog.

When the user checks the status of a request that contains a custom field, the field is read-only information until the user resubmits that request. At that point, the user can edit the custom field value and any other fields to be updated.

To make custom fields visible in the Service Request Catalog checkout panel, your Service Request Catalog `applicationContext.properties` file must point to the same Service Manager server that you used to create the custom fields.

Custom fields and the cache

It is possible that an Administrator adds new fields to a Service Catalog item at the same time that an user is attempting to order that item. If the Administrator implements a new custom field before the user submits a request, an inconsistency may be introduced to the system. To prevent this, user data is cached on the server side. Therefore, if an administrator modifies a panel or item while a user is actively using Service Request Catalog, the user's data will be preserved and repopulated.

> **Note:** We recommend that the Administrator avoids modifying custom fields while users are actively engaged in using the system.

Add a configuration

A *configuration* is the description of one or more new sections with custom fields that appears in a Service Request Catalog checkout panel. Use the examples to create a sample configuration of your own.

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps.

1. Start a Service Manager Windows client session. Make sure the Service Manager Windows client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Checkout Panel**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations. There can be a maximum of three configurations that add new sections with custom fields to the Support catalog, Services catalog, or Support checkout panel.

To add a configuration, follow these steps:

4. From the Service Request Catalog Configuration Wizard home page, click **Add a Configuration**.

5. Create a **Name** for the new configuration.

   Example: Type `Support Custom Fields`.

6. Click the drop-down list to specify which checkout panel will display the new custom fields. Choose **Service Catalog**, **Support Catalog**, or **General Support**.

   Example: Select **Support Catalog**.

   > **Note:** A General Support request is a request for an item or service that is not listed in the regular Service Catalog or Support Catalog.

7. If your HP Service Manager instance is in multi-company mode, choose a specific **Company** from the drop-down list.

8. Click **Next**.

9. You can choose an existing label for a new section, or you can create a new one. Click **Select a label** or **Add a label**.

   Example: Click **Add a label** and type `CONTACT NUMBERS` for the name of the new label.

10. You can choose an existing label for a new field, or you can create a new one. Click **Select a label** or **Add a label**.

    Example: Click **Add a label** and type `FAX` for the name of the new label.

11. Click **Next**.

12. Click the **Field Name** drop-down to choose the field that you want to populate with new

information.

Example: Choose Faxfrom the drop-down list.

> **Note:** If you select a lookup table in step 16, then you must use the lookup field name here.

13. In the **Modifiability** field, you can set the field permission to enable the user to do one of the following:
    - **Create-only** changes the field only when submitting a new request. It cannot be updated if the request is resubmitted.

    - **Read-only** displays data that is never changed during the initial submission or during resubmission.

    - **Create and Update** changes the field when submitting a new request and updating a request if the request is resubmitted.

    Example: Select **create-only** from the drop-down list.

14. In the **Display Type** drop-down list, select the type of field that you want to appear in the Service Request Catalog checkout panel. Choose a display that is consistent with the type of data that you want to gather. For example, if you want the user to provide information, choose **Text**. If you want the user to choose from a pre-defined list, choose **Pick List**.

    Example: Choose the **Text** option.

15. Click **Next**.

16. In the **Lookup Table** field, select the table that contains the field to be populated with (or display) new information.

    Example: Leave this blank if you want to create a plain text field.

    > **Note:** If you use a lookup table here, then you must use the lookup field name in step 12.

17. Select the **Mandatory** option if the user must provide this information. If the information is optional, skip this step.

    Example: Select the **Mandatory** option.

> **Note:** If you specified the field permissions in step 13 as **Read-only**, **Mandatory** will not be an available option.

18. Select the **Default Value** option if you want to specify a default value for the user. To set variables as the default values, select the **Is Expression** option. For detailed information, see "Setting variables as the default values for custom fields" on page 34.

> **Note:** If you set the **Lookup Table** and **Lookup Field Name**, make sure that the result of the expression can match a record in the lookup field. Otherwise, the default value is not set correctly.

    Example: Type None as the default value (in case the user has no fax number).

19. Click **Next**.

20. The Wizard displays the custom field that you created. You can click **Add New Custom Field** to add another.

    Example: Click **Add New Custom Field**.

21. Repeat step 10 through step 19 to add another custom field.

    Example: Create one more custom field for a Phone Number using the contacts table and Alternate Phones field.

22. When you have more than one custom field, you can:
    ○ Change the order of appearance by selecting a field and then clicking **Move Field Up** or **Move Field Down**.

    ○ Select a field and then click **Edit Custom Field** to make changes.

    ○ Click **Remove Custom Field** to delete that field.

23. When you are satisfied with the result, click **Finish**.

Edit an existing configuration

You can edit an existing configuration for checkout panel, including the default out-of-box checkout panels. You can use the following steps to modify the default checkout panels to do any of the following:

- Enable or disable attachments.

- Change the name of the configuration as it appears in HP Service Manager.

- Change the name of the checkout panel as it appears in the Service Request Catalog user interface.

- Change the company for which the checkout panel applies.

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps.

1. Start a Service Manager Windows client session. Make sure the Service Manager Windows client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Checkout Panel**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations. There can be a maximum of three configurations that add new sections with custom fields to the Support catalog, Services catalog, or Support checkout panel.

Then, to edit the configuration, follow these steps:

1. Click **Edit Configuration**.

2. Edit the field you wish to change.

3. Click **Next**.

Localize a configuration

To localize a configuration, follow these steps:

1. Log on to the Service Manager client as a system administrator.

2. Type `db` in the command box, type `svcSrcConfig` in the **Table** field, and then click **Search**.

3. Double-click `svcSrcConfig` in the search list, and then click **Search**.

4. Select the checkout panel configuration you want to localize.

5. In the details panel, find the **Label Id** under **Options** fields that you want to localize.

6. Type message in the command box, type srcconfig in the **class** field, 23 in the **Message Number** field, and then click **Search**.

7. Modify the text and language code that you want to localize. For example for the fr language code, enter the appropriate text in French, and then click **Add**.

Add a section to an existing configuration

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps.

1. Start a Service Manager Windows client session. Make sure the Service Manager Windows client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Checkout Panel**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations. There can be a maximum of three configurations that add new sections with custom fields to the Support catalog, Services catalog, or Support checkout panel.

To add a new section to a custom configuration, follow these steps

1. From the Service Request Catalog Configuration Wizard home page, double-click an existing configuration.

   Example: If you added a section to the Support Catalog checkout panel, double-click the **Support Catalog** configuration.

2. To create a new section in that configuration, click **Add a Section**.

3. You can **Select a Label** from labels that you already created or you can click **Add a Label** to create a new section heading.

   Example: Type More Information as the new section heading.

4. Click **Next**.

5. Repeat step 10 through step 19 in to add one or more custom fields to the new section.

6. When the new section is complete, click **Finish**.

Modify an existing section

You can make some editorial changes to an existing section.

- To change the name that identifies that section in the Checkout panel, select a label and then click **Edit Section Label**.

- To delete the section from the Checkout panel, select a label and then click **Remove Section**.

- To change the order of a section's appearance, select a label and then click **Move Section Up** or **Move Section Down**.

Delete a configuration

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps.

1. Start a Service Manager Windows client session. Make sure the Service Manager Windows client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Checkout Panel**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations. There can be a maximum of three configurations that add new sections with custom fields to the Support catalog, Services catalog, or Support checkout panel.

To delete a custom configuration, follow these steps:

1. From the Service Request Catalog Configuration Wizard home page, right-click an existing configuration.

2. Click **Remove Configuration**.

Setting variables as the default values for custom fields

When you enter a variable or an expression as the default value and select the **Is Expression** check box at the same time, the tailoring values for custom fields are automatically filled in the user interface. This also applies to CI information retrieval and fulfillment. If you use variables as the default value for

the item title and description fields, the title of the items are automatically filled when you submit these items in your cart.

This enhancement supports the following content:

- Traditional expressions in Service Manager applications, such as name in $lo.operator

- Jscall syntax to return advanced query results, such as the location of a logged in user. As long as a predefined JavaScript expression can return a query result, it can be set as a default value in custom fields.

  Note: To use jscall, make sure you define the Javascript function in the Script library first.

- Logical name

  If you are setting default value for a lookup field which will retrieve a logical name value, you must use XML string to return the correct value.

  Note: There are some restriction rules for the XML string:

  - You cannot change the label and value attributes in the XML string and the format of the string must follow this example:

    <root>< label >CHAR-adv-asi-desk-102</label><value>CI1000102< /value ></root>

    In this example, the label attribute returns the value of display name and the value attribute returns the value of CI number.

  - If you add more than one child to the XML string, only the first child of the XML string is supported. For example, if you write a string as:

    <root>< label >CHAR-adv-asi-desk-102</label><value>CI1000102< /value ><label>CHAR-adv-asi-desk-101</label><value>CI1000101</value></root>

    Only the display name of CHAR-adv-asi-desk-102 and value of CI1000102 is supported by the system.

- Any RAD expressions

- Text, Multiple Text, Checkbox, and Pick List default value types. Different value types support

different data types, as shown in the following table.

Default value types	Supported data type	Examples
Text/MultiText	Character, Logical, Number, Date, and Time	○ $lo.operator ○ jscall("srcLib.getDefaultName") ○ "default value:"+$G.my.currency
Checkbox	Logical	○ "falcon"=name in $lo.operator ○ $G.my.currency="USD" ○ jscall("srcLib.getDefaultCheckBox") **Note:** The expression for Checkbox only returns the values "true" and "false".
Pick List	Character, Number, Date, and Time	○ jscall("srcLib.getNumber") ○ jscall("srcLib.getNumber")+1

- Pre-defined variables in Service Request Catalog

Default value	Definition	Content displayed
$src.cart.item.name	The name of the cart item	○ The name of the item or bundle, if there is only one item or bundle in the cart ○ **Multiple cart items request**, if there are mutiple items in the cart
$src.cart.item.name.list	The list of the cart item	○ The name of the item or bundle, if there is only one item or bundle in the cart ○ A name list for all items, if there are mutiple items in the cart
$src.cart.size	The size of the cart item	The number of items in the cart

Note: When your customization is complete, you must restart the Service Request Catalog web application server (for example, Tomcat) for the changes to take effect.

Use case 1: Add a new My Location label to the Additional Information section

In an out-of-box deployment, when you create a support request in Service Request Catalog, only one Urgency label is available in the Additional Information section in the support Checkout panel.

If your location is required for the request, you can add a new **My Location** label to this **Additional Information** section. In this new label, your location is defined as a variable and the value is automatically filled according to your location information.

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps.

1. Start a Service Manager Windows client session. Make sure the Service Manager Windows client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Checkout Panel**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations. There can be a maximum of three configurations that add new sections with custom fields to the Support catalog, Services catalog, or Support checkout panel.

To add a new **My Location** label that applies the variable as the default value, follow these steps:

4. On the Service Request Catalog Configuration Wizard home page, click **Support Checkout**.

5. Select the label ID for the **Additional Information** section.

6. Click **Add New Custom Field** to add a new custom field for the location of the operator.

7. Select **Add a Label** and then type **My Location** as the label name.

8. In the **Field Name** drop-down list, select **Contact Location**.

9. In the **Modifiability** drop-down list, set the field permission to **Create and Update**. **Create and Update** changes the field when an operator submits a new request and updates a request if the request is resubmitted.

10. In the **Display Type** drop-down list, select the **Text** option, and then click **Next**.

11. In the **Lookup Table** field, select **Location** as the lookup table.

12. In the **Lookup Field Name** field, select **Location** as the lookup field name.

13. Select the **Default Value** option to specify a default value.

14. Select the **Is Expression** option.

15. In the input box, type the following expression as the default value:

    ```
    jscall("LocationDefault.getLocation",name in $lo.operator)
    ```

    Note: Make sure that the results of the expressions that you specify for the lookup table and lookup field name match a record in the lookup field. Otherwise, the default value is not set correctly.

16. Click **Next** to add the the **My Location** label as a new field, and then click **Finish**.

After the tailoring takes effect in Service Request Catalog, the new **My Location** label is added to the **Additional Information** section in Support Checkout panel when you create a support request. The value of the **My Location** field is automatically filled according to your location information.

Use case 2: Automatically enter an interaction title and its description

In an out-of-box deployment, when you submit a service request in Service Request Catalog, the Title and Description fields are empty. You need to enter the content manually.

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps.

1. Start a Service Manager Windows client session. Make sure the Service Manager Windows client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Checkout Panel**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations. There can be a maximum of three configurations that add new sections with custom fields to the Support catalog, Services catalog, or Support checkout panel.

To add variables as a default value to the **Title** and **Description** fields, follow these steps:

4. On the Service Request Catalog Configuration Wizard home page, click **Service Checkout**.

5. Select the label ID for the **Delivery Information** section.

6. Click the **Title** label to modify the default value for the title field, and then click **Next**.

7. Select the **Default Value** option to specify a default value.

8. Select the **Is Expression** option.

9. In the input box, type the following expression as the default value. This expression retrieves the

    item name and uses it as the title.

    `$src.cart.item.name`

10. Click **Next**. The **Delivery Information** section opens again, as shown in step 5.

11. Click the **Description** label to modify the default value of the title field, and then click **Next**.

12. Select the **Default Value** option to specify a default value.

13. Select the **Is Expression** option.

14. In the input box, type the following expression as the default value. This expression retrieves the
    item name and use it as the description.

    `$src.cart.item.list`

15. Click **Next**. When the **Delivery Information** section opens again, as shown in step 5, and then click
    Finish.

The following table displays the effect of setting different variables in the **Title** and **Description** fields.

Variables	Only one item	Only one bundle	Multiple items
$src.cart.item.name (for **Title**)	Item name	Bundle name	Multiple cart items request
$src.cart.item.name.list (for **Description**)	Item name	Bundle name	A name list for all items
jscall	No	No	A name list

Variables	Only one item	Only one bundle	Multiple items
("srcLib.getDescText",$src.cart.size,$src.cart.item.name.list) (for **Description**)	content	content	for all items

After the tailoring takes effect in Service Request Catalog, the **Title** and **Description** fields are automatically filled when you create a service request.

Multi-company mode

If you have already operated in multi-company mode, the method to configuration of custom fields changes slightly. In this case, you must define a custom field configuration for each type of request (Service Catalog, Support Catalog, and Support request) for each company.

To verify whether the multi-company mode is configured, follow these steps:

1. Log on to Service Manager as a system administrator.

2. Click **System Administration** > **Base System Configuration** > **Miscellaneous** > **System Information Record**.

3. On the **General** tab, make sure that **Run in Multi-Company Mode** is selected.

If you have already configured the multi-company mode, you also created the individual companies and associated those companies with users. You can verify the settings for any specific company by logging into Service Request Catalog as a user assigned to that company.

Example: Multi-company mode

The following steps provide an example of how you might configure the multi-company mode for Service Request Catalog:

1. Create two new users in HP Service Manager. To do this, follow these steps:

   a. Navigate to **System Administration** > **Ongoing Maintenance** > **User Quick Add Utility**.

   b. Enter the required information to create a new user named kuser.

   c. Click **Next**, and then follow the onscreen instructions to save the operator record.

   d. Repeat the above steps and create another user named duser.

2. Create two new companies. To do this, follow these steps:

   a. Navigate to **System Administration** > **Base System Maintenance** > **Companies**.

   b. Click **Add**, and then enter the required information to create a new company named kcompany.

   c. Repeat the above steps and create another company named dcompany.

3. Assign the new users to the new companies. To do this, follow these steps:

   a. Type operator in the command line, and then press the **Execute** button.

   b. Search for kuser.

   c. In the Operator Record for kuser, select kcompany from the **Default Company** comfill control.

   d. Repeat the above steps for duser, but set the **Default Company** comfill control to dcompany.

4. In the manifest.xml file for your Service Request Catalog deployment, modify the configuration section as shown in the following sample:

```
<configurations>
   <configuration name="kcompany">
    ...
   </configuration>
   <configuration name="dcompany">
    ...
   </configuration>
</configurations>
```

5. To customize Service Request Catalog for each company, add the theme resources (for example, panel.swf and style.swf) to each company's folder.

Advanced search for interactions

When you search for a request, sometimes a large number of results are returned. You can set the search criteria to locate a specific request or group of requests by using advanced search.

> **Note:** Not all fields in interactions can be used for Service Request Catalog advanced search, as not

all fields include the available search criteria. For detailed information about which fields are available as search criteria, see "Fields available for advanced search" on page 44.

Search for an interaction

To search for and view a Service request or a Support request, follow these steps:

1. Click the filter button to cascade the available filters. The out-of-box filters include: Request ID, Requested For, Open Time, and Close Time.

   Note: The administrator configures the default filters that are initially displayed in the account view page.

2. Type the search terms in your selected filter box, and then press Enter.

   ○ You can choose terms from the global list variables or the lookup table values if the administrator has configured the validation rule for this field.

   ○ You have to press the Enter key after you type each search term. Check the effected filters on the request details page to make sure all the search criteria are taking effect.

   The search results are displayed in a list in the request details page.

3. Click an item to view the details of that request.

   Note: You can also adjust your search results by removing one or all of the search filters.

Add a search field

Note: When your customization is complete, you must log in to Service Request Catalog again for the changes to take effect.

To add a field, continue with these steps:

1. Start a Service Manager client session. Make sure the Service Manager client connects to a Service Manager9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Advanced Search**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations.

4. Select the company for which you want to modify the advanced search configurations.

   ○ To enable multi-company mode for advanced search, you have to enable the multi-company mode and start the system schedule list builder. The multi-company list is displayed on the advanced search company after you log in to the Service Manager client again.

   ○ If a Service Request Catalog login user (operator) is not assigned a company value, the configurations of advance search do not take effect.

5. Click **Add a Field**.

6. Click the **Field Name** drop-down list to choose the field that you want to populate with new information. The field type below is automatically populated.

   Example: Choose `Urgency` from the drop-down list.

   Note: If you add a logical type field in Service Manager, the filter for this data type only takes effect in Service Request Catalog when the filter value is set to **true** by selecting the check box of this filter in Service Request Catalog user interface. Otherwise, this search filter is ignored during the search.

   For example, you add a new Customer Visible field as a search filter in Service Manager. When you select the check box in Service Request Catalog, only the requests whose customer visible field value is set as `true` are displayed. However, if you do not select this check box in Service Request Catalog, it does not mean that the requests whose Customer Visible field is set as `false` will be returned. Instead, the search results are not affected by this filter.

7. For the **Field Label** section, you can perform one of the following actions:

   ○ Select the **Use Default Label** option to use the default field label from datadict.

   ○ Select the **Select a Label** option to select a label from the existing labels stored in the srcadvsearch class in the scmessage table.

   ○ Select the **Add a Label** option to add a new label. After you add a new label, the information of

this label is stored in the srcadvsearch class in the scmessage table.

> **Note:** The label that you select or add overwrites the default label.

8. For the **Validation Rule** section, you can perform one of the following actions:

    ○ Select the **None** option if no validation rule is applied.

    ○ Select the **Record in Global List** option to enable globalist validation. You can click the **Global List** drop-down list to specify a value. In this way, from the Service Request Catalog advanced search function, you can pick up a value from the drop-down list as pre-defined in the global list.

    ○ Select the **Record in Table** option to enable lookup table validation. You can click the **Table Name** and **Field Name** drop-down lists to specify a value. In this way, from the Service Request Catalog advanced search function, you can click the lookup button to pick up a value from the list.

9. When the new field is complete, click **Finish**.

Fields available for advanced search

Not all fields in interactions can be used for Service Request Catalog Advanced Search, the fields are limited based on the following rules:

- Level 1 fields

- The type of the field is one of the following categories: character, number, date/time, or logical.

- The field is not a virtual join field that ends up with "vj" or contains ".vj"

To check the full list of the fields available for advanced search, see .

Edit an existing search field

You can edit an existing search field for the advanced search. You can use the following steps to modify the default search fields.

> **Note:** When your customization is complete, you must log in to Service Request Catalog again for the changes to take effect.

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps:

1. Start a Service Manager client session. Make sure the Service Manager client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Advanced Search**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations.

To edit the configuration, continue with these steps:

4. From the Service Request Catalog advanced search configuration Wizard home page, select the company for which you want to modify the advanced search configurations.

   > ○ To enable the multi-company mode for advanced search, you have to enable the multi-company mode and start the system schedule list builder. The multi-company list is displayed on the advanced search company after you log in to the Service Manager client again.
   >
   > ○ If a Service Request Catalog login user (operator) has no company value to set with, the configurations of advance search do not take effect.

5. Click **Edit a Selected Field**.

6. Edit the field you want to change. For details about the field description, see "Add a search field " on page 42.

7. Click **Finish**.

Delete a search field

> **Note:** When your customization is complete, you must log in to Service Request Catalog again for the changes to take effect.

To complete any of the Service Request Catalog tailoring tasks, start with these basic steps:

1. Start a Service Manager client session. Make sure the Service Manager client connects to a Service Manager 9.41 server. The client can be an earlier version, but the server must be a 9.41 server.

2. Expand the left Navigation pane.

3. Click **Tailoring** > **SRC Tailoring** > **Advanced Search**. Service Manager displays an SRC Configuration wizard. The first page of the wizard lists existing configurations.

To delete a search field, continue with these steps:

4. From the Service Request Catalog advanced search configuration Wizard home page, select the company for which you want to modify the advanced search configurations.

   - To enable multi-company mode for advanced search, you have to enable the multi-company mode and start the system schedule list builder. The multi-company list is displayed on the advanced search company after you log in to the Service Manager client again.

   - If a Service Request Catalog login user (operator) has no company value to set with, the configurations of advance search do not take effect.

5. Click an existing search field.

6. Click **Remove a Selected Field**.

SRC survey

SRC survey is based on the HP Service Manager HTML Email solution (JavaMail) and applies the out-of box internal Survey connector. You can manually send individual surveys directly from a record to selected users, or configure the system to automatically send scheduled surveys to specified users.

When users receive an SRC survey link, they can directly open the link in a web browser and then log in to SRC to complete the survey. They can also check the surveys opened for them or closed by them in the SRC portal. In the out-of-box system, SRC surveys are designed to achieve the following goals:

- Collect user satisfaction ratings for the following areas: the level of service provided, the speed of response that the user received, and the level of communication.

- Collect additional comments from the user (if any)

- Allow the user to further register a complaint or compliment. If the user selects to do so, the system automatically generates an interaction record of a Complaint or Compliment category with the information the user provided, and sends an email to the user with information about the interaction record. The user can click the record link to check the record details and status.

- Allow the administrator to add new questions to surveys

- Allow the administrator to customize the answer types in the survey

SRC survey setup

Setting up manual surveys only requires the common configurations while setting up scheduled surveys requires some addition configurations.

Common configurations

Both types of SM surveys require the following configurations:

- The HTML Email solution must be set up. For details, see the "Set up HTML Email for SM surveys" page in the Service Manager Help Center.

- The SRC URLs must be set up in the System Information Record. For details, see the "Configure web tier URLs for SM surveys" page in the Service Manager Help Center. In the **SRC URL** field, type the fully qualified SRC URL to your web tier. For example:

  ```
  http://<SRC Server Address>:<port number>/<SRC App Server Name>
  ```

- The survey portal must be set as SRC. You can change the survey portal from **System Administration** > **Ongoing Maintenance** > **Survey** > **Survey Settings**.

Once these configurations are ready, you can send manual SRC surveys from a record by selecting the **Send Survey** option. However, scheduled SRC surveys require additional configurations.

Additional configurations for scheduled SRC surveys

Scheduled surveys are based on the survey integration framework, and therefore require additional configurations. For details, see the "SM Survey setup" page in the Service Manager Help Center.

Send an SRC survey from a record

Once your administrator has set up HTML Email and configured the SRC URLs in the System Information Record, you can manually send a survey from a record at any state in one of the following modules:

- Service Desk

- Request

- Incident

- Problem

- Change

- Configuration Item

To manually send an SRC survey from a record, follow these steps:

1. Open a record. For example, open an interaction record.

2. Click **More** > **Send Survey** to display the **Manual Customer Survey** interface.

3. Click **Fill** to select one or more recipients from the list.

4. Click **Send** to send the survey to the selected recipients.

   Note: If you type an email address instead of selecting a recipient from the list, Service Manager sends a survey email to the corresponding user. If no corresponding user is found, Service Manager sends the email directly to this email address.

The specified recipients receive an email notification, which contains a survey link and instructions on how to respond to this survey.

Customize your SRC survey

In the out-of-box system, four questions are provided for SRC surveys. You can also customize your survey questionnaire to add new questions. Before customization, you need to add new fields in the SurveyInternal dbdict. SRC supports four field data types, including character, logical, array, and

number. For details about the out-of-box questions and how to add a new question, see the "Design your own SM survey questionnaire" page in the Service Manager Help Center.

To customize your survey template and answer types, follow these steps:

1. Click **Tailoring** > **SRC Tailoring** > **Survey**.

2. From the SRC Configuration Wizard home page, click **Add a Field**.

3. Select a field name from the SurveyInternal dbdict record. The records include four out-of-box questions and new records you add. After a question is added to the survey template, the corresponding record disappears from the drop-down list.

4. Select a question label from the available labels or add a new label for this question.

5. Select the answer type for this question.

Answer type	Explanation	Supported field	Global List available?	Allow customized answer?
Text	Enables users to enter a text answer in a single row.	number, character, array	No	No
Multiple text	Enables users to enter a text answer in multiple rows.	array	No	No
Checkbox	Enables users to choose an answer for a logical (true or false) data type field.	logical	No	No
Multiple selection	Enables users to choose multiple answers.	array	Yes	Yes
Drop-down list	Enables users to select one value from a set of mutually exclusive values provided in the drop-down list format.	number, character, array	Yes	Yes
Radio buttons	Enables usersto select one value from a set of mutually exclusive values provided radio button format.	number, character, array	Yes	Yes

6. Select **Allow Customized Answer** if choices are extensive or if the user may need to enter a choice manually.

7. Select **Mandatory** if you want to add verification to this question.

> **Note:** For the four out-of-box questions, the first three questions are set as mandatory and this selection is read-only. You can modify the labels for the first three questions but you cannot remove them.

8. When you are satisfied with the result, click **Finish**.

Respond to an SRC survey

User roles: users

If you receive an email notification inviting you to respond to an SRC survey, follow the instructions to view and respond to the survey.

To view and respond to an SRC survey, follow these steps:

1. Open the survey link in a web browser.

   The SRC login screen appears.

2. Log in to SRC.

3. On the header bar, click **Dashboard**.

   The pane titled "Your Surveys" shows how many open surveys are pending.

4. At the bottom of the pane, click **Your Surveys** to open the list of surveys.

   > **Note:** To view all surveys, you can also click **Surveys** from the **User Account** drop-down list in the header.

5. Click one of the surveys from the list to open a survey.

6. Select your answers to the survey questions.

7. (Optional) Enter additional comments.

8. (Optional) Select **Register a compliment** or **Register a complaint** to register an interaction.

If you select either option, the system will automatically create an interaction record that has a category of Compliment or Complaint and send you another email with the record details after you submit the survey. By default, the **No** option is selected.

9. Click **Submit**.

The survey now appears in your list of closed surveys (**Survey** > **Closed**).

Use the Service Manager software load balancer

Service Request Catalog supports the HP Service Manager software load balancer automatically, provided that you configure Service Request Catalog to point to the Service Manager software load balancer port. For example, if the `http` port for the Service Manager software load balancer is `13080`, your Service Request Catalog `applicationContext.properties` file should resemble the following:

serviceManager.protocol=http

serviceManager.hostname=*hostname.domainName*

serviceManager.port=13080

If you are using SSL, make sure that Service Request Catalog points to the `HTTPS` port of the software load balancer:

serviceManager.protocol=https

serviceManager.hostname=*hostname.SdomainName*

serviceManager.port=13443

Chapter 4: Miscellaneous tasks

The tasks in this section are optional tasks, which you may need to complete according to your organization requirements. You should read and familiarize yourself with these tasks in case you wish to return to perform additional configuration of Service Request Catalog at a later time.

Enable Knowledge Management

Before a user creates a support request, you may want to encourage them to search an external knowledge database to find a documented solution or recommendation. This feature is optional, but can be useful to help your user community resolve problems quickly without opening formal support requests.

Before you try to enable Knowledge Management from Service Request Catalog, verify the following:

- You have a Knowledge Management license. Without this license, SRC cannot display a Knowledge Management Search page.

- Knowledge Management is configured according to the recommendations in the Knowledge Management documentation.

When you enable the Knowledge Management link, the interface displays a Search Knowledgebase window where the user can type a search phrase.

To enable the Knowledge Management link, follow these steps:

1. Open this file with a text editor:

    C:\...\WEBINF\classes\applicationContext.properties

2. Locate and then set the **src.km.enabled** property to **true**.

3. Save and close the file.

4. Restart the Tomcat application server to make the changes take effect.

After enabling Knowledge Management, you must re-index the Service Request Catalog Knowledge Base index. To do this, follow these steps:

1. In the HP Service Manager client, navigate to **Knowledge Management** -> **Administration** -
   > **Environment**.

2. Check the **SRC?** box.

3. Verify that the correct server is specified in the **Search Server Name:** drop-down box. If not, select
   the correct server from this drop-down box.

4. Click the **Full Re-index** button.

Configure subscriptions

The configuration of subscriptions in Service Request Catalog is performed in the standard HP Service
Manager Service Catalog. For documentation on how to set up Service Catalog items including
subscriptions, consult your HP Service Manager documentation.

> **Note:** It is not required that a user of Service Request Catalog must make or have a subscription to
> request an item.

Enable the approval delegation

To enable other operators to delegate approval authority, a system administrator must make the
following changes to an operator's application profile:

To delegate approval authority for this application	Requires enabling this application profile option
Change Management	Can Delegate Approvals
Request Management	Delegate Approvals
Service Catalog (controlled by Service Desk profiles)	Delegate Approvals

The Delegate Approvals or Can Delegate Approvals profile option only controls whether an operator can
view the Approval Delegation wizard. Separate application profile options control whether an operator
can view or approve objects in an application.

Enable delegation for service

To enable Service Request Catalog users to delegate approval authority, a system administrator must update each operator's service profile record with the Delegate Approvals and View options. There is no additional capability word required for a Service Request Catalog user to delegate their approval rights. To access the service profile settings from the operator record, follow these steps:

1. Click **System Administration** > **Ongoing Maintenance** > **Operators**.

2. On the **General** > **Application Profiles** tab, make sure you specify self service in the **Service Profile** field.

3. Click **Save**.

4. On the **Security** tab, locate the **Template Information** section.

5. If **Template_SelfService** appears in the **Template** field, delete it.

6. Click **Save**.

7. Return to the **General** tab.

8. Place the cursor in the **Service Profile** field.

9. Click **Find** on the toolbar. Service Manager displays the Service Desk Security Profile form.

10. On the **Security** tab, select **Delegate Approvals**. This enables the user to assign their approval rights to someone else.

Service Desk Security Profile

Profile name : [   ]

◇ Security   ◇ Forms

◇ Rights

☑ New   ☑ Advanced search
☑ Close   ☐ Use operator full name
Update: Always ▾   ☐ Can create personal views
               ☑ View   ☐ Can create system views
Allowed statuses: ☐ Can notify
                           ☐ Lock on display
                           ☐ Alternate views
                           ☐ Modify Templates
Approval groups: Service Manager ☐ Template Mass Update
                           ☐ Complex Mass Update
                           ☐ Mass Close
                           ☑ Delegate Approvals

11. If necessary, select **View**.

12. Click **Save**.

Enable Approval Delegation for Change

The following example illustrates how to enable approval delegation for the Change Management application:

1. Log in to Service Manager with a system administrator account.

2. Click **System Administration** > **Ongoing Maintenance** > **Profiles** > **Change Management Profiles**. Service Manager displays your custom Change Management profile form.

3. In the **Profile Name** text box, type the name of a profile you want to grant approvals. For example, enter `change approver`.

4. Click **Search**.

5. Service Manager displays the current Change Management Security Profile.

6. In the Approvals/Groups tab, select **Can Delegate Approvals**.

7. Click **Save**.

> **Note:** Best practice is to enable the Delegate Approvals or Can Delegate Approvals option only for operators who can both view and approve objects in the application.

Enable Approval Delegation for Quote

The following example illustrates how to enable approval delegation for the Request (Quote) Management application:

1. Log in to Service Manager with a system administrator account.

2. Click **System Administration** > **Ongoing Maintenance** > **Profiles** > **Request Management Profiles**.

3. Service Manager displays your custom Request Management profile form.

4. In the **Profile Name** text box, type the name of a profile you want to grant approvals . For example, type `request approver`.

5. Click **Search**.

6. Service Manager displays the current Change Management Security Profile.

7. In the Alert/Approval tab, select **Can Delegate Approvals**, and then make sure that the **Approvals** check box is checked.

8. Click **Save**.

> **Note:** Best practice is to enable the Delegate Approvals or Can Delegate Approvals option only for operators who can both view and approve objects in the application.

Improve SRC performance

> **Note:** These steps only improve performance only if you do not have an ApprovalA1 table in your

installation of HP Service Manager. In Service Manager 9.41, this table has already existed.

The following changes to the Service Manager database can improve the performance of Web Service requests from Service Request Catalog. These steps should be completed by an experienced Service Manager administrator.

These changes remedy problems that occur when the Service Manager server cannot fully translate Service Manager queries to an SQL server when fields that appear in the query are mapped to large object (LOB) type fields. The changes prevent inefficient scans by the Service Manager server when it runs queries against tables that reference LOB type fields.

Note: If you have already mapped any repeating group in a table that is referenced by an Array table, you have an Array table that uses the A1 alias. In this case, use a different alias, such as A2, and append that alias value to the base table name to form the table name. For example, you may already have an Array table for the Approval file. If you already have an A1 table, use alias A2 and name the table APPROVALA2 instead.

Create the ApprovalA1 table

To remap the current.pending.groups array from a CLOB/TEXT field to an Array table, create APPROVALA1 table. You should use the Dbdict utility, neither the System Definition utility nor the SQLMapping utility. To edit the dbdict for the Approval file, follow these steps:

1. In the **Fields** pane, scroll to and then double-click on the current.pending.groups array definition line.

2. Click the **Edit** field.

3. Set **SQLTable** to **a1**.

4. Click **Next**. You should be positioned on the dbdict entry for the current.pending.groups character field.

5. Set **SQLTable** to **a1**.

6. Change the **SQL Type** from **CLOB** to **VARCHAR(120)** and click **OK**.

7. Select the **SQL Tables** tab and add a new line with alias, name, and type of **a1 APPROVALA1 oracle10**.

8. Click **OK**. A pop-up dialog displays the DDL to create the new table.

> **Note:** Do *not* modify the DDL.

9. Copy this DDL to the clipboard for future reference.

10. Click **User Alters**.

> **Note:** Do *not* click SM Alters.

11. Click **OK** on the main dbdict window to update the dbdict.

> **Note:** After you click **User Alters**, Service Manager displays a dialog warning that you must now alter the database by using the displayed DDL. However, Service Manager also tries to modify the database directly by using that DDL. If it succeeds, nothing further is required.

The operation will succeed, provided the `sqllogin` account information in the Service Manager `sm.ini` file is for a database user with the rights to issue `CREATE TABLE` and `CREATE INDEX` commands. If the `sqllogin` account information in the Service Manager `sm.ini` file is for a database user who does not have these rights, the operation will fail, and an appropriately authorized user must manually run the DDL that you copied to the clipboard against the Service Manager database schema.

12. Verify that Service Manager succeeded in creating the new table and index by examining the Service Manager database in Oracle to confirm that the new `APPROVALA1` table was created.

13. Investigate any SQL error messages that appear.

14. Use Oracle SQL Developer or another database management tool to verify that the `APPROVALA1` table was created.

Remap the parent.tree field

The following task is to remap the **parent.tree** field in the `capability` file to an Array table. You should use the Dbdict utility, neither the System Definition utility nor the SQLMapping utility. To edit the `capability` file to an Array table, follow these steps:

1. Select the **parent.tree** type array.

2. Click the **Edit** field.

3. Set **SQLTable** to **a1**.

4. Click **Next**. You should be positioned on the **parent.tree** type character.

5. Change the **SQL** type to **VARCHAR(50)**.

6. Change **SQLTable** to **a1**.

7. Click **OK**.

8. Go to **SQLTables**.

9. Add **a1 CAPABILITYA1 oracle10**.

10. Click **OK**. A pop-up dialog displays the DDL to create the new table.

    > **Note:** Do *not* modify the DDL

11. Copy this DDL to the clipboard for future reference.

12. Click **User Alters**.

    > **Note:** Do *not* click SM Alters.

13. Click **OK** on the main dbdict window to update the dbdict.

    > **Note:** After you click **User Alters**, Service Manager displays a dialog warning that you must now alter the database by using the displayed DDL. However, Service Manager also tries to modify the database directly by using that DDL. If it succeeds, nothing further is required.

    The operation will succeed, provided the `sqllogin` account information in the Service Manager `sm.ini` file is for a database user with the rights to issue `CREATE TABLE` and `CREATE INDEX` operations. If the `sqllogin` account information in the Service Manager `sm.ini` file is not for a database user who does not have these rights, the operation will fail, and an appropriately authorized user must manually run the DDL that you copied to the clipboard against the Service Manager database schema.

14. Verify that Service Manager succeeded in creating the new table and index by examining the Service Manager database in Oracle to see if the new `CAPABILITYA1` table was created.

15. Investigte any SQL error messages that appear.

16. Use Oracle SQLDeveloper or another database management tool to verify that the CAPABILITYA1 table was created.

Remap the access.list Field

The following task is to remap the **acces.list** field in the svcCatalog file to an Array table. Use the Dbdict utility, not the System Definition utility or the SQLMapping utility. To edit the svcCatalog file to an Array table, follow these steps:

1. Select the access.list type array.

2. Click the **edit** field.

3. Set **SQLTable** to a2.

4. Click **Next**. You should be positioned on the access.list type character.

5. Change the **SQL** type to VARCHAR(50).

6. Change **SQLTable** to a2.

7. Click **OK**.

8. Go to **SQLTables**.

9. Add a2 SVCCATALOGA2 oracle10.

10. Click **OK**. A pop-up dialog displays the DDL to create the new table.

   > **Note:** Do *not* modify the DDL.

11. Copy this DDL to the clipboard for future reference.

12. Click **User Alters**.

   > **Note:** Do *not* click SM Alters.

13. Click **OK** on the main dbdict window to update the dbdict.

   > **Note:** After you click **User Alters**, Service Manager displays a dialog warning that you must now alter the database by using the displayed DDL. However, Service Manager also tries to modify the database directly by using that DDL. If it succeeds, nothing further is required.

The operation will succeed, provided the `sqllogin` account information in the Service Manager `sm.ini` file is for a database user with the rights to issue `CREATE TABLE` and `CREATE INDEX` operations. If the `sqllogin` account information in the Service Manager `sm.ini` file is not for a database user who does not have these rights, the operation will fail, and an appropriately authorized user must manually run the DDL that you copied to the clipboard against the Service Manager database schema.

Remap the operators Field

The next task is to remap the operators field in the `kmgroup` file to an Array table. Use the Dbdict utility, not the System Definition utility or the SQLMapping utility. To edit the `kmgroup` file to an Array table, follow these steps:

1. Select the operators type array.

2. Click the edit field.

3. Set **SQLTable** to a1.

4. Click **Next**. You should be positioned on the `operators` type character.

5. Change the **SQL** type to `VARCHAR(60)`.

6. Change **SQLTable** to a1.

7. Click **OK**.

8. Go to **SQLTables**.

9. Add a1 `KMGROUPA1 oracle10`.

10. Click **OK**. A pop-up dialog displays the DDL to create the new table.

   > **Note:** Do *not* modify the DDL.

11. Copy this DDL to the clipboard for future reference.

12. Click **User Alters**.

   > **Note:** Do *not* click SM Alters.

13. Click **OK** on the main dbdict window to update the dbdict.

> **Note:** After you click **User Alters**, Service Manager displays a dialog warning that you must now alter the database by using the displayed DDL. However, Service Manager also tries to modify the database directly by using that DDL. If it succeeds, nothing further is required.

The operation will succeed, provided the `sqllogin` account information in the Service Manager `sm.ini` file is for a database user with the rights to issue `CREATE TABLE` and `CREATE INDEX` operations. If the `sqllogin` account information in the Service Manager `sm.ini` file is not for a database user who does not have these rights, the operation will fail, and an appropriately authorized user must manually run the DDL that you copied to the clipboard against the Service Manager database schema.

14. Verify that Service Manager succeeded in creating the new table and index by examining the Service Manager database in Oracle to see if the new `KMGROUPA1` table was created.

15. Investigte any SQL error messages that appear.

16. Use Oracle SQL Developer or another database management tool to verify that the `KMGROUPA1` table was created.

Remap the members Field

Re-map the `members field` in the `cm3groups` file to an Array table. To edit the `cm3groups` file to an Array table, follow these steps:

1. Select the **members** type array.

2. Click the **edit**field.

3. Set **SQLTable** to **a1**.

4. Click **Next**. You should be positioned on the `members` type character.

5. Change the **SQL** type to **VARCHAR(60)**.

6. Change **SQLTable** to **a1**

7. Click **OK**.

8. Go to **SQLTables**.

9. Add **a1 CM3GROUPSA1 oracle10**.

10. Click **OK**. A pop-up dialog displays the DDL to create the new table.

> **Note:** Do *not* modify the DDL.

11. Copy this DDL to the clipboard for future reference.

12. Click **User Alters**.

> **Note:** Do *not* click SM Alters.

13. Click **OK** on the main dbdict window to update the dbdict.

> **Note:** After you click **User Alters**, Service Manager displays a dialog warning that you must now alter the database by using the displayed DDL. However, Service Manager also tries to modify the database directly by using that DDL. If it succeeds, nothing further is required.

The operation will succeed, provided the `sqllogin` account information in the Service Manager `sm.ini` file is for a database user with the rights to issue `CREATE TABLE` and `CREATE INDEX` operations. If the `sqllogin` account information in the Service Manager `sm.ini` file is not for a database user who does not have these rights, the operation will fail, and an appropriately authorized user must manually run the DDL that you copied to the clipboard against the Service Manager database schema.

14. Verify that Service Manager succeeded in creating the new table and index by examining the Service Manager database in Oracle to see if the new `CM3GROUPSA1` table was created.

15. Investigate any SQL error messages that appear.

16. Use Oracle SQL Developer or another database management tool to verify that the `CM3GROUPSA1` table was created.

Additional performance tips

If the user receives a "max session exceed" error when running SRC with large number of concurrent users, increase the Service Manager max threads per node. To do this, follow these steps:

1. Edit the `sm.ini` in the root Service Manager directory: $SM_install_dir$\server\RUN

2. Locate the **Threadsperprocess** parameter, and then increase the number. If the parameter is not present in the sm.ini file, add the parameter by using the following format:

    `Threadsperprocess:{number}`

3. Restart the Service Manager server.

For Oracle databases, you can improve the SRC login and approval performance by adding an expression index. To do this, follow these steps:

1. Log in to Oracle Database under the sysop role.

2. Locate the `APPROVALM1` table.

3. Create the following expression index on this table:

    `FILE_NAME ||'-'|| COMPONENT ||'-'|| UNIQUE_KEY ||'-'|| NAME`

Look-up fields

Service Request Catalog displays certain information, such as contact information, based on the corresponding QBE lists in Service Manager.

All Service Request Catalog users must have complete contact information specified in their HP Service Manager operator and contact records for the contact look-up to search successfully for a match. The contact record and the operator record must contain the first name, last name, and company information for the user. Service Manager generates a formatted contact ID that may also be used in the contact look-up.

Example: The Service Manager user Jennifer Falcon has this information in her company and operator records:

- Last name = Falcon

- First name = Jennifer

- Company = HP

Her Service Manager generated contact ID is FALCON, JENNIFER.

If you are using the Contact look-up in Service Request Catalog, you can find her by typing one of the following:

- Her first name only

- Her last name only

- Both first and last name

- Her contact ID (in upper case)

Add additional contact information

You can add additional contact information by modifying the following property in the applicationContext.properties file:

src.sm.additionalContactInfo=N,F,L,E

The N, F, L, and E represent the following:

```
N -: FullName
F -: FirstName
L -: LastName
E -: E-mail address
```

If you do not wish to use any additional info, you can comment out this line by using the preceding pound (#) character.

Define a Date/Time user selection

This version of Service Request Catalog allows you to use the Date/Time Validation mechanism of Service Manager. You can use the tod() to define an appropriate expression for a Date/Time user selection.

For example, suppose you want to specify a minimum 5-day delivery date for the delivery of a catalog item. To do this, you can configure a "Deliver By:" user selection in the Catalog Item to use the following expression (in the "greater than" field):

tod()+ '5 00:00:00'

When a user tries to order this catalog item, the user must choose a date that is greater than 5 days from the current system time. Otherwise, a warning message appears, and the user must pick another date.

Update Service Manager lists

HP Service Managerprovides list information to Service Request Catalog that appears in different sections as the user completes a request. The items in the lists are configured in Service Manager. Therefore, if you want to change the contents of certain lists that appear in Service Request Catalog, you must use the Service Manager Windows or Web client to change the appropriate Service Manager record.

The Service Manager Help Server has all the information and steps to make changes to global lists.

1. Obtain the URL for the Service Manager Help Server.

2. Type or paste it into a browser window.

3. Type **global lists** in the Search area of the Help Server interface to locate all information about these lists.

For Service Request Catalog, you can make changes to these lists:

- Callback Type (to specify the users preferred contact method)

- Interactions Activity Types (such as "Operator update")

- Resolution Code (to categorize the reason for closure)

- Urgency (such as "Critical" or "High")

Service Manager localizes these lists to make sure they render correctly in different locales. If you customize any list value, you must create manual translations of your new values and store them in the appropriate locale folder.

Supporting other locales

You may have a global community of users who want to view the service catalog in their preferred language. Service Request Catalog provides complete out-of-box localization for multiple languages. You must complete tasks to configure support for your selected languages.

Service Request Catalog also supports the currency code and symbol for each of these languages. Complete the following tasks to enable more than one locale. The only constraint is that each locale

must be supported by HP Service Manager. Complete the first three tasks with a Service Manager client that connects to your Service Manager server.

Review Out-of-box Supported Languages

Language	Language Code
Arabic	ar_SA
Brazilian Portuguese	pt_BR
Czech	cs_CZ
Dutch	nl_NL
English	en_US
French	fr_FR
German	de_DE
Hungarian	hu_HU
Italian	it_IT
Japanese	ja_JP
Korean	ko_KR
Polish	pl_PL
Russian	ru_RU
Simplified Chinese	zh_CN
Spanish	es_ES

Task 1: Configure the language in Service Manager

The first task is to make the selected language available when the user logs in to Service Request Catalog. Some languages may already be enabled on the Service Manager side. Others may not be enabled. To verify whether your target language is enabled, or to enable your target language, follow these steps:

1. From the Service Manager client, expand the left navigation and click **Tailoring** > **Database Manager**.

2. From the **Table** field, type or select **language**.

3. Click the **Search** icon.

Service Manager returns a list of Service Manager language files.

4. Double-click the desired language file.

5. From the **Language Identification** dialog, click the **Search** icon.

   A list of available languages appears. If the language you want has an active flag set to true, the language is enabled, and your task is complete. If the flag is false, proceed to the next step.

6. Select the language that you want to enable.

7. Check the empty **Active for logins** check box.

8. Click **Save** to update the language record.

9. Click **OK**.

10. Repeat step 1 through step 9 to add more languages.

11. Click **Back** to exit this task.

12. Restart the Service Manager client to verify your changes.

Task 2: Configure the user profile

The second task is to associate a default language with the individual user in their Service Manager user profile. For users in a multi-lingual environment, one might prefer to search the catalog in French, while another user would be more comfortable with Spanish.

> **Note:** If the user does not exist in the Service Manager system, you can follow these steps to navigate to the Operator Record dialog, but you must create the user before you complete the language association task.

1. Verify the target language is configured in Service Manager by reviewing Task 1 in the **Support Other Locales** section.

2. In the **System Navigator** pane, click **System Administration** > **Ongoing Maintenance** > **Operators** to edit the user's operator record.

3. Click **Search**.

4. Select the user from the **Login Name** or **Full Name** column.

5. Click the **Login Profile** tab.

6. Click the **Language** drop-down list to select the default language for that user.

7. Click **Save**.

8. Click **OK**.

9. Repeat step 2 through step 8 if you have more than one operator record to configure.

10. Click **Back** to exit this task.

Task 3: Localize the item record

1. To display any item in the user's preferred language, you must add the specific language attribute to the item record. If you skip this step, the item appears in the default language.

2. In the **System Navigator** pane, click **Service Catalog** > **Manage Catalog** to locate the record to be localized.

3. Click **Search**. Service Manager displays a list of the item records in the catalog.

4. Scroll to find the target record in the list.

5. Click the record in the list to display all the record information in the **Category Definition** form.

6. When Service Manager displays the record, right-click anywhere in the form and select **Localize this record** from the context menu.

7. Service Manager displays the *Create Localized Data* wizard.

8. Choose the language from the drop-down list. **Example:** select German.

9. Replace the English **Name**, **Short Description**, and **Long Description** with equivalent values in the language you selected in step 6.

10. Click **Finish**. Service Manager displays a confirmation message above the **Category Definition** form.

11. Repeat step 3 through step 8 to create localized versions of each catalog record.

12. When you are finished, click **OK**.

13. Click **Back** to exit the task.

Task 4: Configure the currency

All currencies related to supported locales are available in the Service Request Catalog application. Currency values can appear with a symbol, such as the dollar symbol ($), or a code, such as USD (United States Dollars). The default display for the English locale is the currency symbol. The default display for non-English locales is the currency code.

Change a currency code or symbol

You can change the way currency displays, or you can add a new code or symbol.

Example: You would like to display using a different currency code or symbol, or even add a new currency.

Change the default currency symbol for Service Request Catalog

The Service Manager server normally provides localized item descriptions and converts the item cost to your locale currency symbol and value without intervention. You can override the currency display by overriding the default value.

1. On the server where you deploy the Service Request Catalog, navigate to the **Control Panel** > **Administrative Tools** > **Services** dialog.

2. Navigate to this folder:

   Windows: `C:\...\src-9.41\resources\client\`

   Unix: `/opt/..../src-9.41/resources/client/`

   All localization sub-folders contain translated text for the application.

3. Open the folder for your locale.

   Example: Hungarian translations are in this folder:

   Windows: `C:\...\src-9.41\resources\client\hu\`

   Unix: `/opt/..../src-9.41/resources/client/hu/`

4. Open the `CurrencySymbol_hu.properties` file.

5. Locate the currency code and symbol that you want to display and remove the comment character from that entry.

6. Save and close the file.

Add a new currency to Service Manager

If you want to display items in the new locale by using the correct currency value and symbol, browse the Service Manager documentation to locate "Displaying currency in the Service Catalog." Follow the recommendations in this and related topics to make sure that:

- Display currency field is set correctly in the affected operator records.

- Currency table contains the correct currency definition record.

- Currency conversion rate, established by the daily currency exchange rate, appears in the currency conversion table.

Add a New Code and Symbol to Service Request Catalog

In this example, we want to add the Korean code and symbol.

Follow these steps on the server where you deploy the Service Request Catalog `.war` file.

1. On the server where you deploy the Service Request Catalog, navigate to the **Control Panel** > **Administrative Tools** > **Services** dialog.

2. Navigate to the following folder:

   Windows: `C:\...\src-9.41\resources\client\`

   Unix: `/opt/..../src-9.41/resources/client/`

   All localization sub-folders contain translated text for the application.

3. The /ko folder contains all property files for the Korean locale. Open this file with a text editor:

   Windows: `C:\...\src-9.41\resources\client\ko\CurrencySymbol_ko.properties`

   Unix: `/opt/..../src-9.41/resources/client/ko/CurrencySymbol_ko.properties`

4. Add the correct currency code and currency symbol to this file.

   Example: To add the Korean currency, add this value:

   `KRW=\u20a9`

5. Save and close the file.

Task 5: Display the currency for a user

To activate the target currency, follow these steps:

1. In the Service Manager Windows client, navigate to **System Administration** -> **Base system Configuration** -> **Currencies**.

2. Enter the target currency name (for example, CNY) and then click **Search**.

3. Check the **Active?** checkbox and click then click **OK**.

To add conversion rates, follow these steps:

1. Navigate to **System Administration**-> **Base system Configuration** -> **Conversion Rates**.

2. Search for the target currency Conversion Rates. Add one if it does not exist. Generally, the **Root Currency Code** should be **USD**.

To add the currency to the user profile, follow these steps:

1. Log in to Service Manager and then enter `operator` in command line.

2. Input a valid Service Request Catalog username and then click **Search** to open the user profile.

3. Click the **Login Profiles** tab and change the **Display Currency** value to the target one.

4. Click **Ok**.

5. Log in to Service Request Catalog by using the username from step 2 and set the language to one which is consistent with the currency. For example, to test Chinese Yuan, set the language to **Chinese**.

6. Open the catalog item that has a specified cost in Service Manager and verify that the correct currency symbols, converted price, and currency format are correct.

Task 6: Configure the browser for a locale

To view Service Request Catalog in a preferred language, users should configure their browser settings. The following general guidelines are for Microsoft Internet Explorer and Mozilla Firefox. If you use an unsupported browser, consult the browser documentation.

Microsoft Internet Explorer

1. Click **Tools** > **Internet Options**.

2. Click the **General** tab.

3. Click **Languages**.

4. Click **Add**.

5. Choose a supported language and then click **OK**.

6. Select that language and move it to the top of the preference list.

7. Click **OK**.

Mozilla Firefox

1. Click **Tools** > **Options**.

2. Click **Content**.

3. In the **Languages** section, click **Choose**.

4. Click **Select a language to add**.

5. Choose a supported language and then click **Add**.

6. Select that language and move it to the top of the preference list.

7. Click **OK**.

Authorizing bi-directional text

Starting from HP Service Manager 9.32, Service Request Catalog supports right-to-left direction for both Arabic and Hebrew language environments. However, without certain modifications, you may find that some text is displayed left-to-right (LTR) or right-to-left (RTL). The following sections provide a brief introduction on bidirectional text, and show you how to input bidirectional texts in the Service Manager client.

Understanding an unexpected text order

HP Service Manager stores texts in Unicode encoding. Service Request Catalog displays texts by using the Unicode standard, which defines the order in which text should be displayed by specifying a particular base direction.

The base direction influences the order of the display of text of different directions, and the display of directionally-neutral text (i.e., characters or sequences of characters that do not have inherent directionality, as defined in the Unicode Character Standard).

In Service Request Catalog, if the language is Arabic or Hebrew, the base direction is RTL; otherwise, LTR.

For example, suppose a user writes the following text in English as the name of a catalog item. In an LTR language in Service Request Catalog, the text is displayed exactly as shown:

```
Printing (North America)
```

However, in a Hebrew or Arabic language environment, where the base direction is RTL, the text displays as follow:

```
(Printing (North America
```

This behavior occurs because a parenthesis is directionally neutral in the Unicode standard and does not have an inherent direction. The Unicode text engine first checks whether a parenthesis can inherit a direction the from surrounding text. If a parenthesis cannot inherit a direction from the surrounding text, it defaults to the base direction. In the example text, the first parenthesis is embedded in a single run of LTR text. Therefore, it adopts the direction of its surrounding text. The second parenthesis, which is at the end of the text, is not surrounded by text of a certain direction. Therefore, the second parenthesis defaults to the RTL base direction.

Thus, the text can be divided into two parts with different directions, wherein the first part is LTR:

```
Printing (North America
```

And, the second part is RTL:

```
(
```

Because ")" displays as "(" in the RTL direction, and the two divided text parts are ordered in the RTL base direction, the text is displayed as shown:

```
(Printing (North America
```

To resolve this issue, the Unicode standard contains two special characters that are used in bi-direction-enabled text.

Unicode character	Code	HTML	Name	Description
LRM	U+200E	‎ ‎ ‎	LEFT-TO-RIGHT MARK	Left-to-right zero-width character
RLM	U+200F	‏ ‏ ‏	RIGHT-TO-LEFT MARK	Right-to-left zero-width character

These zero-width invisible characters act as surrounding text. These characters enable directionally-neutral characters (such as parentheses) to inherit the correct direction from the surrounding text instead of defaulting to the base direction.

In the prior example, you can add a left-to-right mark after the second parenthesis to fix the problem as shown in the following example:

`Printing (North America)LRM`

Because both parentheses are surrounded by LTR text, the whole text is treated as a single run of LTR text. Therefore, the text is displayed as we want in Hebrew or Arabic environment:

`Printing (North America)`

There are other control characters related to bi-directional text in the Unicode standard which are rarely used. For full instruction on the Unicode Bidirectional Algorithm and the related control characters, see the following links:

http://www.w3.org/International/articles/inline-bidi-markup/uba-basics

http://www.unicode.org/L2/L2012/12173-bidi-paren.pdf

http://www.unicode.org/reports/tr9/

Input bidirectional text in the Service Manager client

The text input boxes in the Service Manager clients use Unicode encoding. However, unlike other third-party text editing tools where you can easily insert a left-to-right mark or other Unicode control characters by using a keyboard shortcut or context menu, the Service Manager clients are somewhat limited.

You can use any of the following three methods to input bidirectional text in the Service Manager clients.

Copy from text editing tools (Recommended)

If you are familiar with authoring bidirectional text, you probably have a text editing tool that you often use. You can copy previously-authored bidirectional text from your text editing tool and paste directly into the text input box in the Service Manager client.

> **Note:** Make sure that you do not have the invisible Unicode characters, especially at the start or the end of the text.

Insert a single unicode control character

If you already have some text in Service Manager, and you just want to insert several LRM or RLM marks to make that text bidirectional, you can create these marks easily by using WordPad in Windows. To do this, use one of the following methods:

Method 1

1. Open a new document in WordPad.

2. Type **200E** (200E is the hexadecimal code of LRM) and then press the **Alt+X** keyboard command. The "200E" should disappear and the LRM is inserted.

3. Press **CTRL+A** to select all, and then press **CTRL+C** so you can paste it back into Service Manager.

Method 2

1. Open a new document in Wordpad.

2. Press and hold the **ALT** key, and then type **8206** (the decimal code of LRM) by using the numeric keypad. When you release the ALT key, the LRM is inserted.

3. Press **CTRL+A** to select all, and then press **CTRL+C** so you can paste it back into Service Manager.

Rich text input box in Service Manager client

There are a few rich text input boxes in Service Manager client, such as the detailed description of Catalog items. Rich text input boxes have two editing modes: "normal" and "source".

- In the "normal" mode, you can input bidirectional text as you would in other text input boxes.

- In the "source" mode, you must use the HTML escaped form of special Unicode characters. For example, to input a RLM (right-to-left mark), you should input one of the following:

  ‏

  ‏

  ‏

Configure additional details for Service Requests

You can configure Service and Support request to display additional details from HP Service Manager.

Enable journal updates

You can enable journal updates to appear in Service Request Catalog for each request to provide additional information to the user on the history of their request. Journaling is a feature of Service Manager that allows additional details or updates to a record. If Journaling is enabled on your Service Manager server, and you want to enable those journal updates for Service Request Catalog, follow these steps:

1. Open the `applicationContext.properties` file, and specify the following properties as **true**:

Property	Description
src.sm.service.journalUpdatesEnabled=true	A value of true enables the Journal Updates for service. Change the value to false to hide Journal Updates information
src.sm.support.journalUpdatesEnabled=true	A value of true enables the Journal Updates for support. Change the value to false to hide Journal Updates information.

Edit the custom definition label for journal updates

By default, the label for journal updates is "Request Updates." However, you can modify this label. To do this, edit the `Custom.properties` file, and specify a new label for the `request.update` property.

Require users to read catalog item details

In Service Request Catalog the **Request Now** button allows a user who knows what they are ordering to quickly place a catalog item in the shopping cart and proceed to check out. However, in some cases, you may wish to force the user to read the details of the catalog item. To do this, you can set the `enableDirectRequest` parameter for each of the Service and Support sections to false.

```
src.ui.support.enableDirectRequest = false
src.ui.service.enableDirectRequest = false
```

Note: A value of false means that users must read the catalog item description. A value of true allows users to use the **Request Now** button to place and item in their shopping cart.

Enable the line item status

You can use the following parameter to enable the display of the status for individual line items of a request. If this option it enabled, users can see the status of individual components of a request when they view the status of their request.

```
src.ui.service.enableLineItemStatus=true
```

Configure IPv6

To configure IPv6 for Service Request Catalog, follow these steps:

1. Enable IPv6 support in Tomcat. To do this, see the Tomcat section of the "Configure the Web clients for IPv6 "page in the HP Service Manager Help Center.

2. Enable IPv6 in Service Manager. To do this, see the "Configure the Service Manager server for IPv6" page in the Service Manager Help Center.

3. In folder where Service Request Catalog is deployed, set the `sm.hostname` parameter in the `applicationContext.properties` file to a full qualified domain name or to a valid IPv6 address:

   ```
   sm.hostname=[2620:0:a17:e006:4a8:91c1:c9cb:93dd]
   ```

4. You can access the Service Request Catalog application by entering the valid IP address in your browser, as shown in the following example:

   ```
   http://[2620:0:a17:e006:4a8:91c1:c9cb:93dd]:8080/src9.41
   ```

Enable FIPS for Service Request Catalog

FIPS (Federal Information Processing Standards) are a set of standards that describe document processing, encryption algorithms and other information technology standards for use within U.S. non-military government agencies and by U.S. government contractors and vendors who work with such agencies.

As of version 9.32, HP Service Manager supports the FIPS 140-2 approved Advanced Encryption Standard (AES) 256-bit data encryption algorithm. To use FIPS together with Service Request Catalog, you must first enable FIPS mode in Service Manager. For information on how to do this, see the following sections of the *Service Manager Help Center*:

- "FIPS mode"

- "Configure FIPS mode in Service Manager"

Use the FIPS standard in Service Request Catalog

Service Request Catalog provides one tool to generate encrypted password. To support the FIPS standard encryption, this tool has been upgraded from Service Request Catalog 9.32.

> For the details of this tool, see the "Create an Encrypted Password for the Service Manager Administrator " in the *SRC 9.41 Interactive Installation Guide*.

By default, the *runme.bat* script generates an encryption key that meets the FIPS standard. More specifically, the *runme.bat* script uses an Advanced Encryption Standard (AES) 256-bit data encryption algorithm. However, to remain compatible with previous versions of Service Request Catalog, an optional parameter (PBE) is now accepted by the *runme.bat* script, which uses the MD5 and DES encryption of earlier versions of Service Request Catalog. Therefore, the following commands are valid:

- `Runme.bat //uses the AES 256-bit algorithm`

- `Runme.bat PBE //uses the earlier MD5 and DES algorithm`

Common Access Card introduction

The Common Access Card (CAC) is the Unites States Department of Defense (DoD) smart card for multi-factor authentication. CACs are issued as standard identification for active-duty military personnel, reserve personnel, civilian employees, non-DoD government employees, state employees of the National Guard and eligible contractor personnel. In addition to its use as an ID card, a CAC is required for access to government buildings and computer networks.

If you have not configured CACs for Service Manager, you must do so before you can enable CAC for Service Request Catalog. To do this, refer to the following sections of the Service Manager Help Center:

- *Common Access Card (CAC) sign-on*

- *Requirements for CAC sign-on*

You may also want to review the following example in the Service Manager Help Center:

- *Example: Enabling CAC sign-on*

If you have already configured CACs for Service Manager, you can skip ahead to the following section:

Enable SRC for Common Access Cards

To enable Common Access Cards for Service Request Catalog, follow these steps:

1. Enable CAC in HP Service Manager. To do this, use the `cacsign` on parameter from a Service Manager command line, or specify it in the `sm.ini` file.

   ```
   Command line: sm -httpPort:13080 -cacsignon:1
   Initialization file: cacsignon:1
   ```

   For more information on this parameter, see the following section of the *Service Manager Help Center*:

   ○ "Parameter: cacsignon"

2. Complete the following tasks from the "Example: enabling CAC sign-on" section of the Service Manager Help Server.

   ```
   Task 1. Enable required SSL encryption and trusted clients.
   Task 2. Enable CAC sign-on in the SM server.
   Task 5. Connect your web application server to the web server.
   Task 6. Configure your web application server to use SSL.
   Task 7. Configure the web server to use SSL.
   Task 8. Create operator records for CAC users
   Task 9. Configure web browsers to enable web client users to use CAC.
   Task 10. Test your CAC sign-on setup.
   ```

   Note:

   ○ When you perform "Task 1. Enable required SSL encryption and trusted clients", you are referred to "Example: Enabling required SSL encryption and trusted clients" section of the Service Manager Help Center. You need to copy the keystore files generated at step 9 of this procedure to the WEB-INF folder in your Service Request Catalog deployment or, if needed, to a folder that you plan to specify in the `applicationContext.properties` file.

    ◦ Tasks 3 and 4, which are missing from the preceding list, refer to the configuration of the Service Manager Web tier and Windows client, and are not a consideration for Service Request Catalog.

    ◦ If you choose to use CAC, make sure that you have configured Service Request Catalog to use SSL and either TSO or LW-SSO (as appropriate for your environment) as described in the *Service Request Catalog Interactive Installation Guide*.

The following tables show a summary of how your property files should be configured after you have enabled CAC:

ApplicationContext.properties

Configure these properties	Comments

`sm.protocol=`
`sm.hostname=`
`sm.port=13443`
`src.trustStore=`
`src.trustStorePassword=`
`src.keyStore=`
`src.keyStorePassword=`
	Enables two-way SSL between SRC and Service Manager.
	
	Note: The keys are generated when you complete "Task 1. Enable required SSL encryption and trusted clients." See the previous note for details.
	
	`sm.protocol=https`
	`sm.hostname=[FQDN]`
	`sm.port=13443`
	`src.trustStore=C:\\client\\cacerts`
	`src.trustStorePassword=changeit`
	`src.keyStore=C:\\client\\src.keystore`
	`src.keyStorePassword=clientkeystore`

`src.security.mode=cac` `src.security.cac=true`	Enables CAC.
`src.security.secureLogin=true` `src.security.sslPort=8443`	Enables SSL Connection between Service Request Catalog and the end user's client browser.

cacConfiguration.properties

Configure these properties	Comments
`certificateFieldExtractDN=Subject.CN`	This parameter is used to get the field in the certificate that stores the login name. If the DN is from one of the fields in the Subject, set this parameter using the following format: Subject.CN Subject.CN means extracting the DN from the Common Name

cacConfiguration.properties, continued

	field in Subject.
validationStrategy=1	Client Certificate Verification Sequence is as follows: 1. Check the revocation status by using local CRL. 2. Check revocation status by using an online CRL. 3. Check revocation status by using OCSP. 4. Check if the status is expired. 5. Check if the certificate type is smart card.
RootCertPath=	Specifies file path to the issuer CA certificate. This is a mandatory property. Example: RootCertPath=C:/client/CAC/hp_ca_for_cac.cer
CRLRefreshScheduler=	Specifies a schedule in minutes for CRL refresh, if CRL check is enabled. Example: CRLRefreshScheduler=1440
CRLDownloadURL=	The URL that identifies the location of the CRL. If it is not specified, the CRL Distribution Point from the certificate being validated will be used. This behavior will slow performance dramatically. CRLDownloadURL=http://onsitecrl.example.com/LatestCRL.crl
CRLStoreLocation=	Specifies the CRL file path.
OCSPResponderURL=	The URL that identifies the location of the OCSP responder. By default, the location of the OCSP responder is determined implicitly from the certificate being validated. This property is used when the Authority Information Access extension (defined in RFC 3280) is absent from the certificate or when it requires overriding. OCSPResponderURL=http://ocsp.example.net:80

Auto-suggest/Type ahead

Service Request Catalog supports an auto-suggest/type-ahead feature to suggest the top ten matching Catalog items when users enter information in the Search Box. You can enable or disable this feature by modifying the `src.ui.enableAutoComplete` property to true or false in the applicationsContext file, as shown in the following example:

`src.ui.enableAutoComplete=true`

> **Note:** A value of false disables the type ahead feature.

Enable the Remember Login User Name feature

You can enable the Remember Login User Name feature in Service Request Catalog. The src.enableRememberLoginUserName parameter is introduced to enable or disable the Remember Login User Name feature in the user login panel. This parameter is set to false by default, which means SRC does not remember the user name when the user logs on to SRC.

`src.enableRememberLoginUserName=false`

Appendix A: Launcher examples

The following pages demonstrate various ways you can use the Launcher. All configuration for the Launcher is performed by editing the `manifest.xml` file. Some examples are included in the `manifest.xml` file, but are commented out by default.

Example: Add a Bomgar live chat

Service Request Catalog supports integration only with a Bomgar™ chat solution. As such, you must independently purchase a Bomgar™ chat solution for your organization. For more information about the Bomgar API and API documentation, visit www.bomgar.com.

A live chat interface can enhance your catalog support strategy. If a user has a question about an item or a request, live chat support provides immediate assistance. You can embed a live chat link at the top of the Dashboard, Services, or Support landing pages. The link launches a chat window in a new tab or window, depending on the user's browser settings. To create a live chat link from the Dashboard, Services, or Support pages, follow these steps.

> **Tip:** It is always a good idea to make a backup of any system files before you make changes to them. If an error occurs later, you can always return the file to its original state.

1. Open this file with a text editor.

   `C:\...\src-9.41\resources\client\en\Custom.properties`

2. Locate the chat example in the file.

3. If necessary, change `chat_launcher_title`, and the `chat_launcher_description` display text. Note that:

   ○ The identifier can be user-defined; however, when you edit the manifest.xml file, the identifiers have to match.

   ○ The value for each identifier is exactly what will display in the user interface.

4. Save and the file but keep it open for reference as you configure the next file.

5. Open this file with a text editor.

```
C:\...\src-9.41\secure\configuration\manifest.xml
```

Use the following lines as a reference for the remaining steps.

```
<launcher launcherId="Chat_Launcher" showLogoBox="true"
showLogoDropShadow="true>
    <logo>chat_image.png</logo>
    <titleKey>chat_Launcher_title</titleKey>
    <descriptionKey>chat_launcher_description</descriptionKey>
    <launcherType>APP</launcherType>
    <action>
        <labelKey></labelKey>
        <link><![CDATA[http://bomgar_server_name/api/start_session.ns]]></link>
        <method>GET</method>
    </action>
</launcher>
```

6. Locate the `<launchers></launchers>` section, which may contain one or more `<launcher></launcher>` sub-sections that describe the attributes of third party applications that you want to display on the Dashboard.

7. Copy the Live Chat Launcher template section and insert it as a new `<launcher></launcher>` section.

8. Omit the `<fields></fields>` section. It is not relevant for a live chat link.

9. The `<labelKey>` section is not essential. You do not need to insert a value into this tag. The user will click the chat icon to launch the chat window.

10. Verify the `<link>` element. This link must pass the correct parameter values to connect to the chat server. For more information about the correct parameters in the link, consult the Bomgar documentation.

11. If the application is running, log out and log in again to confirm that the third party application link appears in the dashboard.

Create a Cloud Service Automation launcher

To create a Cloud Service Automation launcher from the Dashboard, Services, or Support pages, follow these steps.

Tip: It is always a good idea to make a backup of any system files before you make changes to them. If an error occurs later, you can always return the file to its original state.

1. Open this file with a text editor.

   C:\...\src-9.41\resources\client\en\Custom.properties

2. Locate the chat example in the file.

3. Change `chat_launcher_title` and the `chat_launcher_description` display text to `csa_launcher_title` and to `csa_launcher_description` respectively. When you do this, note the following:

   ○ The identifier can be user-defined; however, when you edit the manifest.xml file, the identifiers must match.

   ○ The value for each identifier is exactly what will display in the user interface.

4. Save and the file but keep it open for reference as you configure the next file.

5. Open this file with a text editor.

   C:\...\src-9.41\secure\configuration\manifest.xml

   Use the following lines as a reference for the remaining steps.

```
<launcher launcherId="CSA_Launcher" showLogoBox="true"
showLogoDropShadow="true>
    <logo>CSA.png</logo>
    <titleKey>CSA_launcher_title</titleKey>
    <descriptionKey>CSA_launcher_description</descriptionKey>
    <launcherType>APP</launcherType>
    <action>
        <labelKey></labelKey>
        <link>
                <!-- Specify the IP Address of the CSA Launcher here -->
                <![CDATA[http://<IPAddressCSA>:<port>/csa/login]]>
        </link>
        <method>GET</method>
    </action>
</launcher>
```

6. Locate the `<launchers></launchers>` section, which contains one or more `<launcher></launcher>` sub-sections that describe the attributes of third party applications that you want to display on the Dashboard.

7. Copy the Live CSA Launcher template section and insert it as a new `<launcher></launcher>` section.

8. Omit the `<fields></fields>` section.

9. The `<labelKey>` section is not essential. You do not need to insert a value into this tag. The user will click the CSA icon to navigate to your organization's CSA Web site.

10. Verify the `<link>` element. This link must specify the correct address to CSA server.

11. If the application is running, log out and log in again to confirm that the third party application link appears in the dashboard.

Example: Get

The following example shows a launcher configuration that specifies a launcher item to trigger a Google search.

> **Note:** POST HTTP Requests are not supported due to issues with security that occur when executed across multiple Web application servers. However, if the target of the POST request is on the same Web application server instance as Service Request Catalog, these security issues are not present.

```
<launcher displayOrder="2"
        launcherId="getLauncher"
        showLogoBox="true"
        showLogoDropShadow="true"
        >
        <logo>test2_app.png</logo>
        <titleKey>get_launcher_title</titleKey>
        <descriptionKey>get_launcher_description</descriptionKey>
        <launcherType>APP</launcherType>
        <fields>
                <field fieldId="q">
                        <labelKey>get_search</labelKey>
                        <type>TEXT</type>
                        <defaultValueKey>get_search_value</defaultValueKey>
                </field>
        </fields>
        <action>
        <labelKey>get_action_label</labelKey>
        <link>
                <![CDATA[http://www.google.com/search]]>
        </link>
        <method>GET</method>
        </action>
</launcher>
```

Appendix B: Service Catalog in Service Manager

Dynamic user options in Catalog Items

You can configure Service Request Catalog to use dynamic user options when a user is making a request. Dynamic user options provide a mechanism by which an Service Request Catalog administrator can gather additional information about a catalog item from a user based on some criteria the user previously entered. For example, users might need to have a request fulfilled within a certain time frame. In this case, the Service Request Catalog administrator can implement a check box (for example, one that uses the mandatory condition) that asks users whether they have a such a requirement. If the user does select the check box, another text field may appear (one which uses the visible condition), where the user can enter in such a requirement, specify the date, and so on.

Create a dynamic user option

- The later steps (after Step 6) in this guideline may vary somewhat, depending on which rules and conditions you have selected. For example, if you select a Pick List, the screen on which you specify the Mandatory and Visible conditions appears after the screen on which you specify the values of the Pick List. However, the functionality remains the same.

- The fields condition and query fields leverage Service Manager's Dynamic View Dependency (DVD) mechanism. Through this mechanism, you can enter an expression to evaluate some value, and determine whether the Mandatory or Visible condition is met. For example, suppose you have a check box (CheckBox1). Depending on whether that check box is selected, you want a text box to appear, so that a user can add additional information. To do this, you would set the Visible Condition to an expression that evaluates the selected status of the check box. For more information on how to write these conditions and their behaviors, see "Notes on expressions in dynamic fields" on the next page and see the Dynamic View Dependencies entry in the Service Manager Help Center.

To specify a mandatory or visible condition on a dynamic field, follow these steps:

1. In the Service Manager client, navigate **Service Catalog** > **Manage Catalog**.

2. Enter the name of the catalog item you wish to modify and then click **Search**.

3. Select the catalog item from the list.

   You must select an item of the "item" type. You cannot select a bundle or category.

4. In the **Catalog Item Definition**, click **User Selections**.

5. Click **Add User Selection**.

6. Specify a Name, a Label, and the Display Type and then click **Next**.

7. Specify the Type (if present), Mandatory Condition, and Visible Condition as required by your business needs.

8. Click **Next**. If you have specified the **Display Type** as **Text** and the **Type** as **String**, you are brought to the Validation Rule screen. Here, you may specify no validation or a validation based on a query run on some table ("Record in Table").

Notes on expressions in dynamic fields

Before you write expressions for the Dynamic fields in a catalog item, it is important that you note the following limitations and behaviors.

Supported Operators

The Condition and Query rules follow the HP Service Manager standard, except that only the following operators are supported:

- **&** (the AND operator)

- **|** (the OR operator)

- **!=** (NOT EQUAL TO operator)

Mandatory Conditions

You can only specify a Mandatory condition for the Text, Multi-Text, and Pick List Display Type. The Mandatory condition can be specified as any of the following four types:

- Hard coded: **true**, **false**

- Variable condition: **name in $lo.operator="falcon"**

  > Only global variables are supported. The global variable list is generated only when a user logs in to Service Request Catalog.

- Dependent on other widget in the user selection: **[*widget_name*] ="falcon"**

  In this example, *widget_name* is name of another widget in the user selection. If the dependent widget does not exist, an error message appears.

- Dependent on the fields of a catalog item outside of the user selection: **$requested.for="FALCON, JENNIFER"**

  > Only the `$requested.for`, `$requested.for.dept`, `$delivery`,and `$service.sla` variables are supported.

Visible Conditions

You can specify a Visible condition for all Display Types.

Mandatory and Query Condition Sample

Type:	Possible values:	Notes:
Hard code condition:	`true` `false`	
Variable condition:	`company in $lo.operator="advantage"`	The company on the right is an element of the object. Only Global variables are supported
Dependent on other widget:	`[widget name]="specificValue"`	`[widget name]` is a placeholder for the name of another widget in the user selection.

Mandatory and Query Condition Sample, continued

Dependent on the fields of catalog item outside of the user selection:	`$requested.for="FALCON, JENNIFER"`	Only the following values are supported in Service Request Catalog:
		
		`$requested.for`
		`$Requested.type`
		`$requested.for.dept`
		`$delivery`
		`$service.sla`

Query fields

The Query field only appears when you have specified the following attributes for your dynamic user option field:

- Display Type: Text

- Type: String

- Validation Rule: Record in Table

If your Dynamic field meets these criteria, you must then specify the following:

- Table Name: *some_table*

- Field Name: *some_field*

- Query Condition:

- Group by Fields: This field is not supported by Service Request Catalog.

> **Note:** If you click the **Edit** button, the advanced query window appears.

Query sample

Type:	Possible values:	Notes:

Hard code condition:	`true`
	`false`
	`contact.name="FALCON, JENNIFER"`
		`contact.name` is a column of the selected table.

Variable condition:	`display.currency.code=$G.my.currency`
	
	`company = company in $lo.operator`
		The company on the left is a column of the selected table.

Query sample, continued

		The company on the right is an element of the object.
Dependent on other widget:	`name =[`*`widget name`*`]`	[*widget name*] is a placeholder for the name of another widget in the user selection. `name` is a column of the selected table.
Dependent on the fields of catalog item outside of the user selection:	`contact.name=$requested.for`	`contact.name` is a column of the selected table. Only the following values are supported in Service Request Catalog: `$requested.for` `$Requested.type` `$requested.for.dept` `$delivery` `$service.sla`

Other Behaviors

For any set custom Dynamic user option fields, you can very easily create a complicated set of rules. Therefore, it is important that you recognize the following behaviors:

- By default, the Mandatory condition is false. If the condition format is not correct, or any JavaScript function call does not exist, then the user option is not mandatory.

- By default, the Visible condition is true. If the condition format is not correct, or any JavaScript function call does not exist, then the user option is visible.

- If a Mandatory condition for a user option is true, but the visible condition is false, a request for that item can still be submitted successfully.

- If the condition format is not correct, or any JavaScript function call does not exist, an empty list is returned.

- If a user option has dependencies on two other user selected fields and the first field has no value, whether second field returns all or empty is decided by the condition expression of the second field. String, number, check box, and date may all behave differently.

- A field that is dependent on another field is cleared automatically if the second field is cleared.

- The Mandatory designation only exists in the Service Request Catalog user interface. In Service Manager, an error message will display when a user does not set a value for mandatory field.

- The Visible behavior only exists in the Service Request Catalog user interface.

- In the case of a circular query condition (where A depends on B, and B depends on A), an empty set is returned.

- In the case of a circular Mandatory condition (where A depends on B, and B depends on A), an empty set is returned.

- In the case of a circular Visible condition (where A depends on B, and B depends on A), an empty set is returned.

- You cannot delete a user selection from Service Manager if another field or user selection depends on it.

- The Query Condition does not support the currency exchange rate. This is due to a limitation in Service Manager, which supports dollar values as numbers, instead of currency. To work around this issue, you can display the currency as a number together with a list that specifies the actual currency (for example, USD or RMB), and the approving manager's name based on your business requirements (if the request is over 500 USD, for example).

Service Request Catalog HTML tag support

HP Service Manager supports a variety of HTML tags as part of the Service Catalog. However, Service Request Catalog supports only a subset of the HTML tags. Therefore, we recommend that you refine the Service Catalog in Service Manager to ensure that catalog items are rendered as expected in Service Request Catalog. The following table shows the tags that are supported in Service Request Catalog.

Note: HTML tags that are not listed in the following table are not supported.

Tag	Description
Anchor	The <a> tag creates a hypertext link, and supports the following attributes: - target: This attribute is ignored by Service Request Catalog. By default, all URLs are opened in a new browser window to prevent Service Request Catalog from being unloaded. - href: Specifies a URL. The URL can be either absolute or relative to the location of

Tag	Description
	`main.jsp` of Service Request Catalog. An example of an absolute reference to a URL is http://www.hp.com; an example of a relative reference is index.html. **Note:** You must prefix a URL with http(s):// to designate it as an absolute URL. Otherwise, Service Request Catalog treats it as a relative URL.
Bold	The <b> tag renders text as bold.
Break	The tag creates a line break in the text.
Emphasis	The <em> tag displays the tagged text in italics. An italic typeface must be available for the font used.
Font tag	The <font> tag specifies a font or list of fonts to display the text. The font tag supports the following attributes: • color: Only hexadecimal color (#FFFFFF) values are supported. • face: Specifies the name of the font to use. You can specify a list of comma-delimited font names, in which case Service Request Catalog selects the first available font. If the specified font is not installed on the local computer, Service Request Catalog selects a substitute font. • size: Specifies the size of the font. The valid value is an integer between 1 and 7; or a relative increase from base font size 3 (for example, "+1" means 4 and "-2" means 1). All relative sizes also belong to the scale of 1 to 7. • letterspacing: Specifies the tracking (manual kerning) in pixels to be applied to the right of each character. • kerning: Specifies whether kerning is enabled or disabled. A non-zero value enables kerning, while zero disables it.
Image	The <img> tag lets you embed external image files (JPEG, GIF, PNG) and SWF movies inside text. The img tag supports the following attributes: • src: Specifies the URL to an image or SWF file. This attribute is required; all other attributes are optional. The images or SWF movies do not show until they are downloaded completely. **Note:** Embedded SWF movies cannot access the network unless there's no sandbox security violation. • width: The width of the image being inserted, in pixels. • height: The height of the image being inserted, in pixels.
Italic	The <i> tag displays the tagged text in italics. An italic typeface must be available for the font used.

Tag	Description

List	The tag (ordered list) and tag (unordered list) are rendered in an identical manner except that ordered list items are numbered and unordered list items are not. Both types of lists are made up of sequences of list items defined by the tag (list item). Service Request Catalog does not support any attributes of the list tags. Lists can be nested as shown in the following examples:
	
	`<ul>`
	`    <li> ... level one, number one... </li>`
	`    <ol>`
	`        <li> ... level two, number one... </li>`
	`        <li> ... level two, number two... </li>`
	`        <ol>`
	`            <li> ... level three, number one... </li>`
	`        </ol>`
	`        <li> ... level two, number three... </li>`
	`    </ol>`
	`    <li> ... level one, number two... </li>`
	`</ul>`

Strike	The <s> and <strike> tags render strike-through style text.
Strong	The <strong> tag renders text as bold.
Paragraph	The <p> tag creates a new paragraph. The <p> tag supports the following attributes: • align: Specifies alignment of text within the paragraph; valid values are left, right, justify, and center.
Text format tag	The <textformat> tag is not a standard HTML tag but a customized tag in Service Request Catalog. It lets you use a subset of paragraph formatting attributes including the following: • indent: Specifies the indentation from the left margin to the first character in the paragraph. Both positive and negative numbers are acceptable. • blockindent: Specifies the indentation applied to all lines of the paragraph. • leftmargin: Specifies the left margin of the paragraph, in points. • rightmargin: Specifies the right margin of the paragraph, in points. • leading: Specifies the leading (line height) measured in pixels between a line's ascent and the previous line's descent.
Underline tag	The <u> tag underlines the tagged text.

Refining the Service catalog

Remove empty categories

Empty Service Manager categories (that contain no items) cause performance degradation when Service Request Catalog attempts to populate existing categories with child items. Service Catalog administrators should verify that the Service Manager Service Catalog contains no empty categories.

Add images for catalog items

You obtain optimum results if all catalog images are the same size and in a similar format. Catalog items display as a "thumbnail" image. Follow these basic rules for attaching a thumbnail image to a catalog item:

- The recommended size for an image is 196x140 pixels. Use a good image utility to crop or resize your images to a consistent size.

- The default background color for a smaller image is white. For consistency, consider adding an appropriate background to maintain the same image dimensions for all items.

- The recommended file type is .jpg or .png. Using other formats may produce unpredictable results.

Separate catalog items for different companies in multi-company mode

These steps should be completed by an experienced Service Manager administrator. An administrator can configure Service Manager to support Multi-Company mode to filter the information that Service Request Catalog users see when making requests. In Multi-Company mode, Service Request Catalog users see only request items for their own company.

An administrator can also enable the Mandanten feature with Multi-Company mode to store company catalog data in its own secure database.

Use the Service Manager Windows Client to complete these steps.

1. To enable Multi-Company mode in the System Information Company record, click
   System Administration > **Base System Configuration** > **Miscellaneous** > **System Information Record** > **General**.

2. Verify that you have a complete company record with Multi-Company enabled. Click
   Tailoring > **Database Manager** > **Table (***company***)** > **Search** > *company* > **Search** > **Show Company in Multi-Company Lists**.

3. Add a new "company" field of type character type to the svcCatalog tables and to the svcDisplay table.

4. Enable Mandanten security by specifying a filtering condition for the svcCatalog and svcDisplay tables. Use the Mandanten Field Restriction form to specify the company value (that you specified in step 3) in the Mandant Field Name field. Create two records: one for File Name svcCatalog and one for File Name svcDisplay. Click
   System Administration > **Ongoing Maintenance** > **Mandanten** > **Mandanten Field Restrictions**.

5. Create a Mandanten security group. Make sure the Security ID is a an upper case value. For example, Service Request Catalog is an upper case value. Click
   System Administration > **Ongoing Maintenance**> **Mandanten** > **Mandanten Security Groups**.

6. Type the "company" value in the first row of the Include Value List. Leave the Exclude Value List empty.

7. Click **Add** to save the security group record.

8. If you enable Mandanten security, add the name of the Mandanten security group to the Security Groups tab on the operator record of each Service Request Catalog user.

9. Assign the company to each category, sub-category, package, and item. This property does not cascade.

   > **Note:** If you are an advanced user, you can use these RAD Debugger commands to accomplish this task:
   >
   > o `d company in $L.file`
   >
   > o `x company in $L.file="company name"`

10. Click **Save**.

11. If you have more than one company defined in Service Manager, make sure each company has categories, subcategories, and producttypes assigned associated with service catalog.

For the detailed steps to complete each Service Manager task, see the Service Manager Help server.

Working with the Support catalog

HP Service Manager self-service users can request support items only through the Service Request Catalog. Users can only request generic support tickets from the Enterprise Self Service (ESS) portal (via the "Submit a Request" selection). The Service Manager administrator must configure the support categories and category items that the user selects in the Service Request Catalog interface.

For an introduction to this process, you can begin by starting a Service Manager Windows client session and expand the left navigation pane. Follow the Example suggestions to create a sample category and item. Your actual Service Catalog and item configuration are dependent on your particular organization's requirements.

For more information, see the Service Catalog section of the Service Manager Help system.

Search for a support catalog category or item

To search for a support catalog category or item, follow these steps:

1. Click **Service Catalog** > **Administration** > **Manage Catalog**.

2. Type any available information into the appropriate fields.

3. Click the **Support Item** checkbox to narrow the search scope.

4. Click **Search**. Service Manager displays a list of all support categories and items in the catalog.

Create a support catalog category

To create Support Catalog categories that contain only sub-categories and items that are related to support, follow these steps:

1. Click **Service Catalog** > **Administration** > **Manage Catalog**.

2. Click **Add New Category**. Service Manager displays a wizard that prompts you for the information about a new category.

3. Type a name in the **Category Name** field.

   Example: Type PCHelp.

4. Type a name in the **Display Name** field that appears in the interface as a category that you can search for items.

   Example: Type PC Help.

5. Type a description in the **Description** field for the new category.

   Example: Type This is a new category.

6. Click **Next**.

7. Make the new category a **Top Level** category, or you can click the drop-down list to make it a **Subcategory** of a selected Top Level category.

   Example: Choose **Top Level**.

8. Specify whether the new category should contain Subcategories, or Items and/or Bundles. Support categories can contain only items, not bundles.

   Example: Choose **Items and/or Bundles** to allow support items to be added to the category.

9. Click **Next**.

10. When Service Manager displays a message that it added a new Service Catalog category, click **OK**. Service Manager displays the Category Definition interface where you can refine the category by choosing an Owner or even attaching an image.

11. To create a Support category, select the **Non-cart category** checkbox.

12. Select the **Support category** checkbox.

13. Click the **Access** tab.

14. Click the first empty row in the **Available to** table.

15. Select the Service Catalog group capability word that you want to associate with this new category.

    Example: `svcCatEmployeeRequester`.

16. Add as many capability word groups to the list as necessary.

17. Click **Save**.

Create a support catalog item

You can create individual support items for the Support Catalog, but you cannot create bundles or packages of support items. To do this ,follow these steps:

1. Click **Service Catalog** > **Administration** > **Manage Catalog**.

2. Click **Add New Support Catalog Item**. Service Manager displays a wizard that prompts you for the information about a new item.

3. Type a name in the **Item Name** field.

    Example: Type `Repair Software`.

4. Select t **Restrict request to a single item** in the checkbox. Support catalog items should be ordered only once.

5. Type a name in the **Display Name** field that appears in the interface as a selectable item.

    Example: Type `Repair Software`.

6. Optional. Select the checkbox for an **Information-only** item if the item is to be read-only in the catalog and not to be requested.

    Example: A temporarily unavailable item might appear in the catalog but not be selectable. Information-only items can also be instructions that appear in the catalog with an image, description, or even attachments, but they do not have an associated price and they cannot be requested.

7. Type a brief description in the **Description**field for the new item.

    Example: Type `Repair email software`.

8. Type a description in the **Detailed Description**field.

Example: Type `Reinstall or upgrade`.

9. Type the cost in the **Cost** field.

    Example: Type `100`.

    > **Tip:** For support items, you may need to gather labor and material costs to accurately reflect the true cost of the support item.

10. Select the Currency unit from the drop-down list.

    Example: Use the default currency that appears.

11. Click **Next**.

12. Click the lookup icon to display available categories.

13. Choose a **Category** from the list to specify what type of record Service Manager should create when a user selects this item. Choose:
    - Complaint

    - Incident

    - Request for change

    - Request for information

    Example: Choose **Request for change**.

14. Select a category **Subarea**:
    - New service

    - Upgrade/new release

    Example: Choose **Upgrade/new release**.

    Service Manager displays the New Support Catalog Item wizard.

15. If necessary, change the Category, Area, or Subarea values. Click **Next**.

16. Choose a connector from the **Connector** drop-down list. The connector is the type of record that Service Manager creates. If you do not select a connector, Service Manager creates a new

interaction with the Category, Area, and Subarea values that you specified for this Support Catalog item.

Example: Leave this blank.

17. Choose a category from the**Category** drop-down list.

    Example: Choose **Applications**.

18. Click **Next**.

19. When Service Manager displays a message that it added a new Service Catalog item, click **OK**.

20. Service Manager displays the Catalog Item Definition interface where you can add more information about the item, add an attachment or an image.

21. If you make changes, click **Save**

Delete a support item

1. Click **Service Catalog** > **Administration** > **Manage Catalog**.

2. Type any available information into the appropriate fields.

3. Click the **Support Item** checkbox to narrow the search scope.

4. Click **Search**. Service Manager displays a list of all categories and items in the catalog.

5. Browse the list to find the category or item that you want to delete.

   Example: Repair software

6. Click **Delete**.

Controlling the permission to create, update, or close interactions

In SRC 9.32 and earlier versions, users can create, update, or close a service request or a support request in SRC regardless of their user profile settings defined in Service Manager.

Starting with SRC 9.33, only users whose user profile has the right permission can create, update, or close a support request in SRC, but all users can create or update a service request regardless of their user profile settings.

Starting with SRC 9.34, only users whose user profile has the right permission can create, update, or close a support request, or create or update a service request.

SRC version	Need permission to create, update,or close a support request?	Need permission to create or update a service request?
9.34 and later	Yes	Yes
9.33	Yes	No
9.32 and earlier versions	No	No

Note: Closing a service request is not supported in SRC.

Disable the permission to create, update, or close interactions

When you disable a profile's permission to create, update, and close interactions, users with the profile are not authorized to create, update, or close a service request or a support request in Service Request Catalog.

To disable the corresponding permission, follow these steps:

1. Log on to Service Manager as an Administrator.

2. Navigate to **System Administration** > **Ongoing Maintenance** > **Profiles** > **Service Desk Profile**.

3. Click **Search**, and then select a profile name from the name list.

    Alternatively, you can type a name in the **Profile Name** field.

4. On the **Security** tab, do one of the following:

    ○   To disable the permission to create an interaction, click to clear the **New** checkbox.

        This disables the **Request** buttons of service items and support items, and the **Create** button of generic support when users with the profile log on to SRC.

○ To disable the permission to update an interaction, select **Never** in the **Update** drop-down list.

This disables the **Resubmit** buttons of service items and support items, and the **Update** button of generic support when users with the profile log on to SRC.

○ To disable the permission to close an interaction, click to clear the **Close** checkbox.

This disables the **Close** buttons of support request when users with the profile log on to SRC.

Note: You can specify the **Allowed Statuses** on the profile setting page for users. In this case, the new, update, and close capabilities are available only when interactions are in a specified status.

Appendix C: XML tag reference

For this XML tag	Insert this value
`<configurations>` `</configurations>`	Define one or more `<configuration></configuration>` sections
`<configuration name="defaul t">` `</configuration>`	Define all the necessary values to describe company customization values. The company name that you configure should match the default company name that is in the end user operator record.
`<companyDisplayNameKey>` `</companyDisplayNameKey>`	company_name is defined in …\resources\client\en\Custom.properties **Custom.properties Example:**company_name = XYZ **Example:** `<companyDisplayNameKey>company_name </companyDisplayNameKey>`
`<resources></resources>`	Define one or more `<resource></resource>` sections within this parameter
`<resource></resource>`	panel.swf should be in this folder: `...\secure\configuration\default\` **Example:**`...\secure\configuration\default\panel.swf` `panel.swf` contains your custom color selections. **Example:**`<resource>panel.swf</resource>`
`<styles></styles>`	Define one or more `<style><style>` sections.
`<style></style>`	styles.css should be in this folder `...\secure\configuration\default\` **Example:**`...\secure\configuration\default\styles.swf` styles.xml contains your custom display settings. **Example:**`<style>styles.swf</style>`
`<launchersGroup>` `</launchersGroup>`	Define the launchers that will appear on each landing page.
`<launchers displayOn="`*Landingpage*`" showIconOnly="false" showButtons="true">`	Identify the third party launchers that will appear on the Dashboard and other landing pages. `displayOn=DASHBOARD|SERVICE|SUPPORT`

For this XML tag	Insert this value

`</launchers>`	`showIconOnly= "true"|"false"`
	
	`showButtons="true"|"false"`

`<launcher`
`displayOrder="n"`
`launcherId="id"`
`showLogoBox="true"`
`showLogoDropShadow="true">`
	You can show the logo as an icon and apply a drop shadow to the icon.
	
	`displayOrder="n"` - order of appearance (left-to-right and top-to-bottom)
	
	`launcherid="id"` - a unique user-defined value for each launcher.
	
	`showLogoBox="true"|"false"`
	
	`showLogoDropShadow="true"|"false"`

`<logo></logo>`	Your launcher logo file should be in this folder: ...\secure\configuration\default\applications The optimum size is 83x83px and the resolution should be 72 dpi. **Example:**...\secure\configuration\default\applications\abc.png The file format must be .png, .gif, or .jpg **Example:**<logo>abc.png</logo>
`<titleKey></titleKey>`	titleKey value from the Custom.properties file. **Example:**<titleKey>launcherName</titleKey> The inserted ID value cannot contain blanks. Use underscore characters as separators if necessary. The display value can contain blank characters. **Custom.properties Example:** **Id Value Display Value** launcherName = XYZ Company
`<descriptionKey>` `</descriptionKey>`	descriptionKey value from the Custom.properties file. **Example:**<descriptionKey>launcherDesc</descriptionKey> The inserted ID value cannot contain blanks. Use underscore characters as separators if necessary. The display value can contain blank characters. **Custom.properties Example:** **Id Value Display Value**

For this XML tag	Insert this value
	launcherDesc = The XYZ Company gives you information about XYZ widgets!
`<launcherType>` `</launcherType>`	Specify the type of third party link: • APP to link to an application, like Wikipedia. • MEDIA to open a video window. The link type value must be upper case. **Example:**<launcherType>MEDIA</launcherType>
`<fields>` `</fields>`	**Optional:** Define one or more individual fields to appear in a popup window.
`<field fieldID="ID">`	Define a field that will appear in a pop-up window. Field ID is a unique user-defined value for each field. **Example:**<field fieldId="GetName">
`<labelKey>` `</labelKey>`	labelKey value from the Custom.properties file. Typically, this is an informational label or text string that might precede a text box or just communicate information. **Example:**<labelKey>textLabel</labelKey> **Custom.properties Example:** **Id Value Display Value** textLabel = Select One: or textLabel = You are about to open a new window.
`<type></type>`	Type of field. Choose one: • TEXT to display any text • TEXTAREA to gather user information • DROPDOWN for list information • HIDDEN for passing information, like a token **Note:** Make sure you type these values in upper case. **Examples:** <type>TEXT</type>

For this XML tag	Insert this value

	`<type>TEXTAREA</type>`
	
	 `<type>DROPDOWN</type>`
	
	 `<type>HIDDEN</type>`

`<defaultValue>` `</defaultValue>`	Specify a constant value to display, such as a list item or other value that you want to pre-populate with static content. **Examples:** `<defaultValue>Welcome!</defaultValue>`
`<options>` `</options>`	Insert individual `<option></option>` values to define values for a dropdown list.

`<option></option>`	For each `<option></option>` tag set, insert `<labelKey></labelKey>` and `<value></value>` tags and related values.
	
	 Example:
	
	 `<option>`
	
	   `<labelKey></labelKey>`
	
	   `<value></value>`
	
	 `</option>`

`<labelKey></labelKey>`	labelKey value from the Custom.properties file. In an option list, specify the key name of a single list value that you want to display in the user interface. **Example:** `<labelKey>dropdown_1</labelKey>` **Custom.properties Example:** **Id Value Display Value** dropdown1 = Black dropdown2 = Red
`<value></value>`	This value can be the same as you defined in the Custom.properties file, or might be a different value to be passed to the third party application server. **Example:** `<value>color</value>`
`<action></action>`	The action describes how data will be passed to the third party application.
`<link></link>`	Insert the URL for the link in a CDATA tag. **Example:** `<![CDATA[www.google.com]]>`

For this XML tag	Insert this value
	Example:<link><![CDATA[http://www.XYZ.com]]></link>

<method></method>	Specify the appropriate action:
	
	• GET enables form data to be encoded by the browser into a URL.
	
	• POST enables form data to be encapsulated in a message.
	
	Note: If the Post request is to access a different domain (server URL), you must confirm that there is a cross-domain policy file configured at the root directory of the remote domain. The cross domain policy file grants access to the sender passing transactional data to that server.
	
	Example: Successful connection to a third-party application in a remote domain, like www.XYZ.com requires a crossdomain.xml file to exist at this location:
	
	`www.XYZ.com/crossdomain.xml`
	
	The crossdomain.xml file would contain a section like this:
	
	`<cross-domain-policy>`
	`<allow-access-from domain="*.ABC.com"`
	`secure="false"/>`
	`</cross-domain-policy>`
	
	Examples:
	
	<method>GET</method>
	
	<method>POST</method>

Appendix D: Styling the interface

You can style Service Request Catalog to show your Company logo, change the application name, or set text formatting and the background as needed.

There are two methods you can use to style the interface. The first method is to modify the `.swf` files. This method is the original method for Service Request Catalog, and supports only desktop clients. However, this implementation was unsuitable for use on tablets, because of its reliance on Adobe Flash. In addition, this method supports all font changes. If you intend to use both the desktop and tablet clients of Service Request Catalog experience on tablets, you can modify the `.zip` files. However, this method does not support all font changes. The following table summarizes this information:

Required elements in `manifest.xml`	Desktop support	Tablet support	Comments

`<swfStyles>style.swf</swfStyles>`
 	
`<swfResources>panel.swf</swfResources>`
	Yes	No	These two elements were present from Service Request Catalog 1.40 and are still available for compatibility. No changes are required to them due to the introduction of the .zip method.
			
			• The `<swfStyles>` and `<swfResources>` elements have priority over the `<cssStyles>` and `<imageResources>` elements.
			
			• The `<swfStyles>style(modified).swf</swfStyles>` file is present from Service Request Catalog 9.34 and enables you to customize the current fonts to Service Request Catalog 1.40. For more information, see "Customize the font family" on page 158.

Required elements in `manifest.xml`	Desktop support	Tablet support	Comments

`<cssStyles>font.css</cssStyles>`
 	
`<imageResources>image.zip</imageResources>`
	Yes	Yes	These two elements were newly added in Service Request Catalog 9.33 to support tablets, although your regular desktop browser will apply them as well.
			
			Note: The desktop browser will apply the `<cssStyles>` and `<imageResources>` elements only if the `<swfStyles>` and `<swfResources>` elements are not defined in the `manifest.xml` file.

Note: You should specify the following images as follows, regardless of which customization method you use:

1. backgroundImag: height < 600px, width < 1600px，

2. companyLogo: height < 40px, width < 120px；

3. footerLogo: height < 40px, width < 120px；

4. headerSeperator: height < 10px；

5. footerSeperator: height < 10px；

All other graphics should be kept at their original size.

Client customization reference

The following user interface labels can be customized in SRC client customization file, which you can find in the following default location:

`/resources/client/xx/custom.properties`

> **Note:**
>
> - In this example path,the *xx* placeholder represents the language code of your SRC installation.
>
> - For any custom property file, we recommend that you use Unicode encoding for any non-English characters. English characters in a non-English resource files will render in plain text as expected.

Example:

Suppose you want to change the default "Dashboard" label in the following screen shot to say "Welcome":
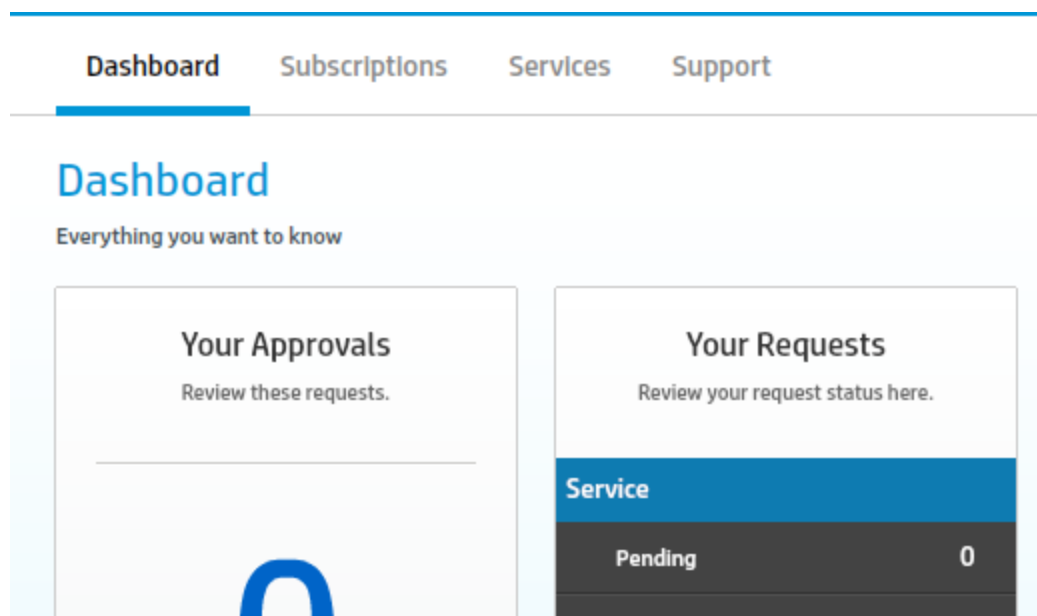
To implement this change, follow these steps:

1. In the file, locate the following UI text label key:

   `header.navigation.tab.dashboard = Dashboard`

2. Change the "Dashboard" value to "Welcome" and then press `CTRL+C` to copy this line.

3. Paste the line into the custom properties file:

   `/resources/client/xx/custom.properties`

4. Restart the Service Request Catalog service.

You Service Request Catalog should appear as follows:
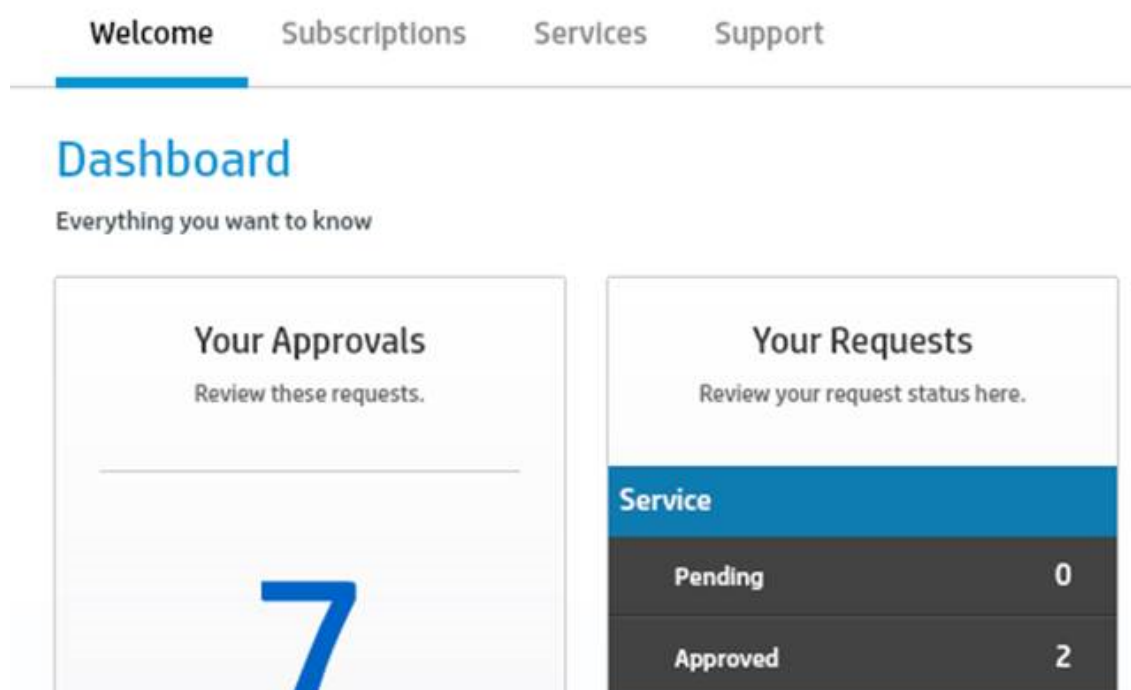
> **Note:** If the label has not changed, clear your browser cache and then restart Service Request Catalog service again.

Customize the SRC header
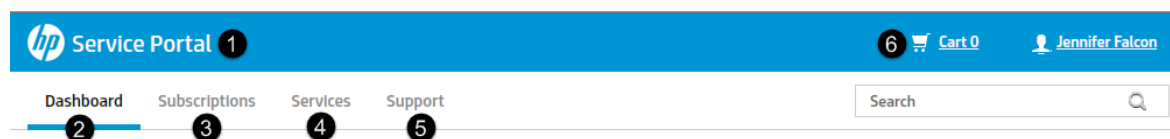
Id	Key	Value
1.	Configured in the manifest.xml, default key : default_company_name_label	Service Portal
2.	header.navigation.tab.dashboard	Dashboard
3.	header.navigation.tab.subscription	Subscriptions
4.	header.navigation.tab.services	Services
5.	header.navigation.tab.support	Support
6.	header.savedItem.button.label	Cart 0

Customize the SRC footer
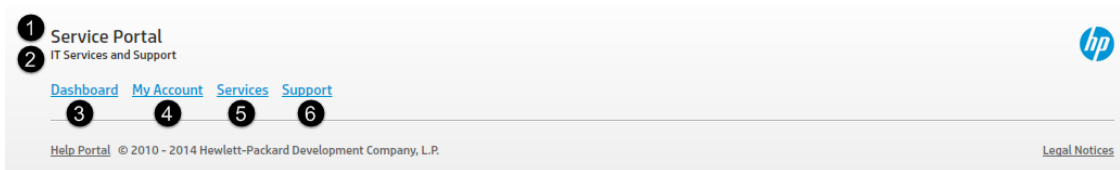
Id	Key	Value
1.	default_company_name_label (Configured in the manifest.xml, default key)	Service Portal
2.	footer.slogan.label	IT Service and Support
3.	footer.navigation.link.dashboard	Dashboard
4.	footer.navigation.link.account	My Account
5.	footer.navigation.link.services	Services
6.	footer.navigation.link.support	Support

Customize the Dashboard
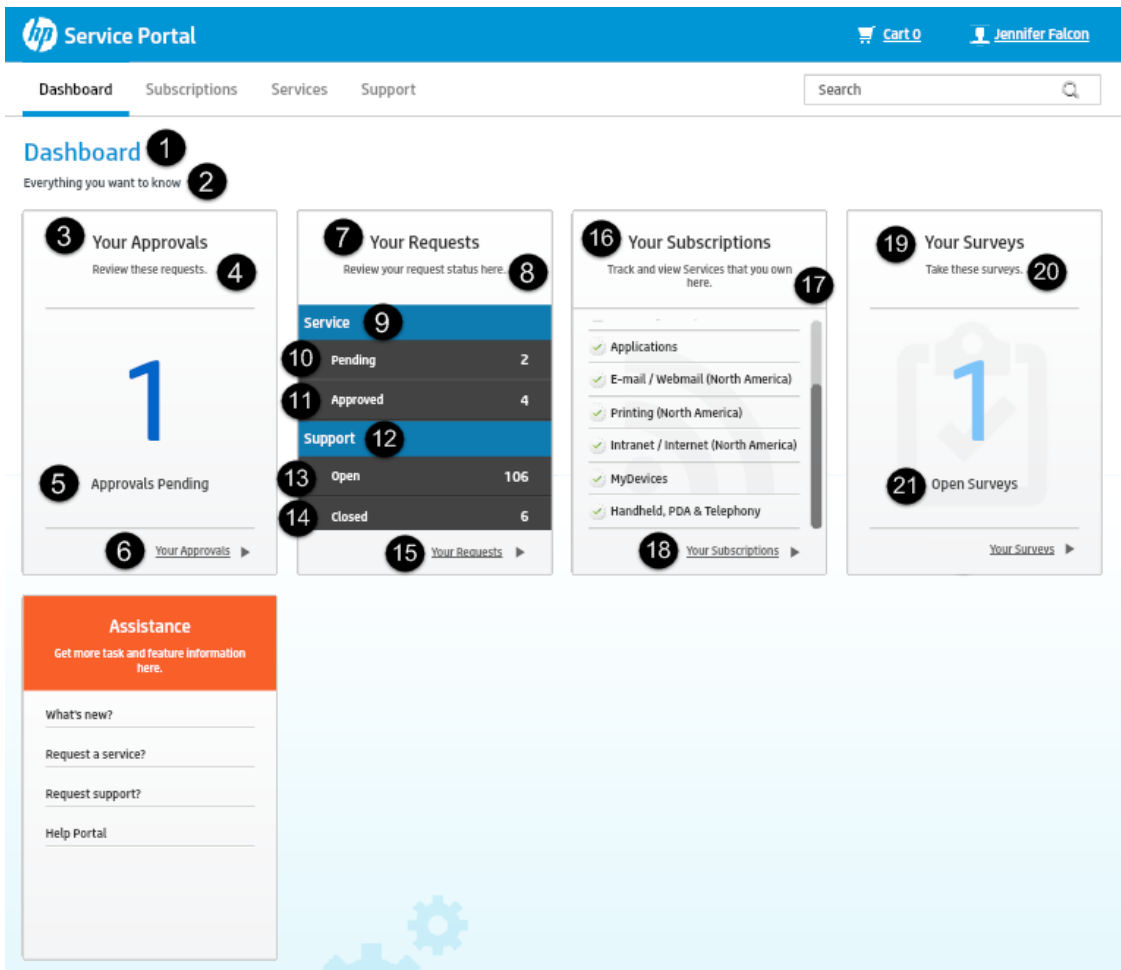
Id	Key	Value
1.	dashboard.dashboard_landing.title	Dashboard
2.	dashboard.dashboard_landing.message	Everything you want …
3.	dashboard.approval_status	Your Approvals
4.	dashboard.approval_widget_instruction	Review these requests
5.	dashboard.view_approval_details	Approval Pending
6.	dashboard.approval_status	Your Approvals
7.	dashboard.request_widget_title	Your Requests

8.	dashboard.sm_services_request_widget_instruction	Review your request ...
9.	dashboard.sm_services_request_status	Service
10.	account_view.status_pending	Pending
11.	account_view.status_approved	Approved
12.	dashboard.support_request_status	Support
13.	account_view.status_open	Open
14.	account_view.status_closed	Closed
15.	dashboard.request_widget_title	Your Requests
16.	dashboard.subscription_widget_title	Your Subscriptions
17.	dashboard.subscription_widget_instruction	Track and view Services ...
18.	dashboard.view_widget_details	Your Subscriptions
19.	dashboard.survey_title	Your Surveys
20.	dashboard.survey_subtitle	Take these surveys.
21.	dashboard.survey_landing	Open Surveys

Customize the Services page

Id	Key	Value
1.	dashboard.service_landing.title	Services
2.	dashboard.service_landing.message	Service Catalog and …
3.	dashboard.popular_items	Popular Requests
4.	dashboard.popular_items_instruction	There are the most requested …
5.	dashboard.request_on_behalf_title	Service Assistant
6.	dashboard.request_on_behalf_instruction	Request Services for another …

Customize the Support Page
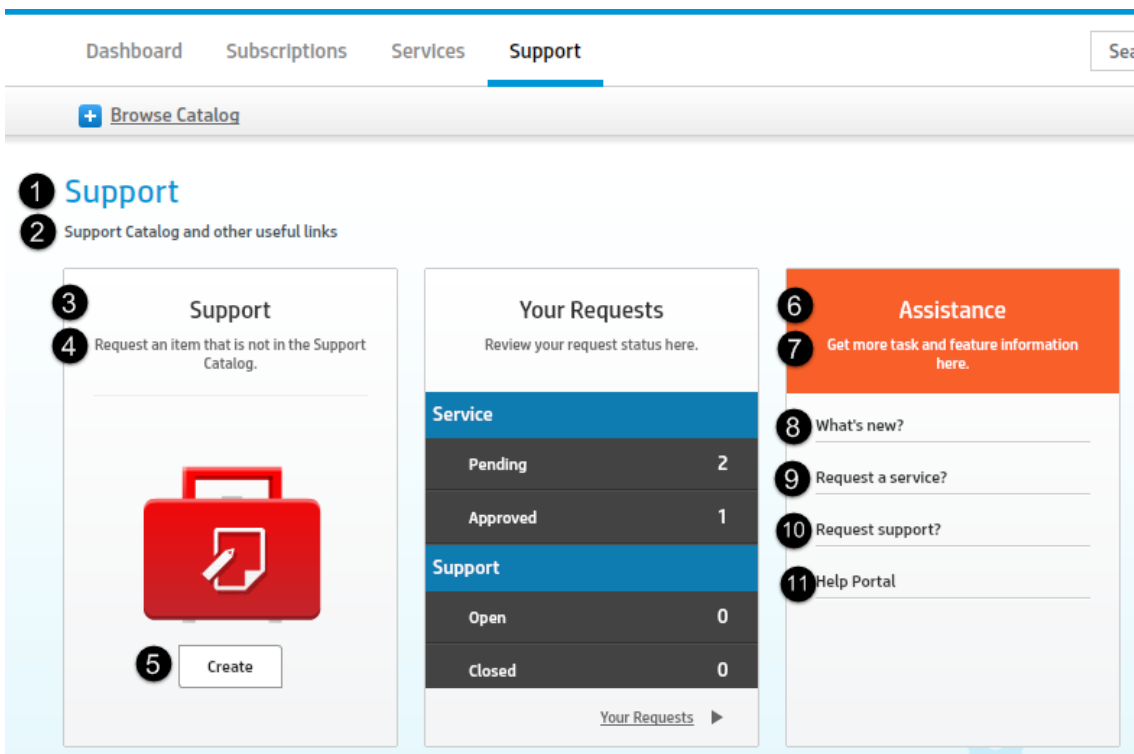
Id	Key	Value
1.	dashboard.support_landing.title	Support
2.	dashboard.support_landing.message	Support Catalog and …
3.	dashboard.support_title	Support
4.	dashboard.support_instruction	Request an item that …

5.	buttonTextCreate	Create
6.	dashboard.assistance	Assistance
7.	dashboard.assistance_instruction	Get more task and ...
8.	dashboard.getting_started	What's new?
9.	dashboard.faqs	Request a service?
10.	dashboard.information	Request support?
11.	dashboard.asssitance_portal	Help Portal

Customize the Account View Page
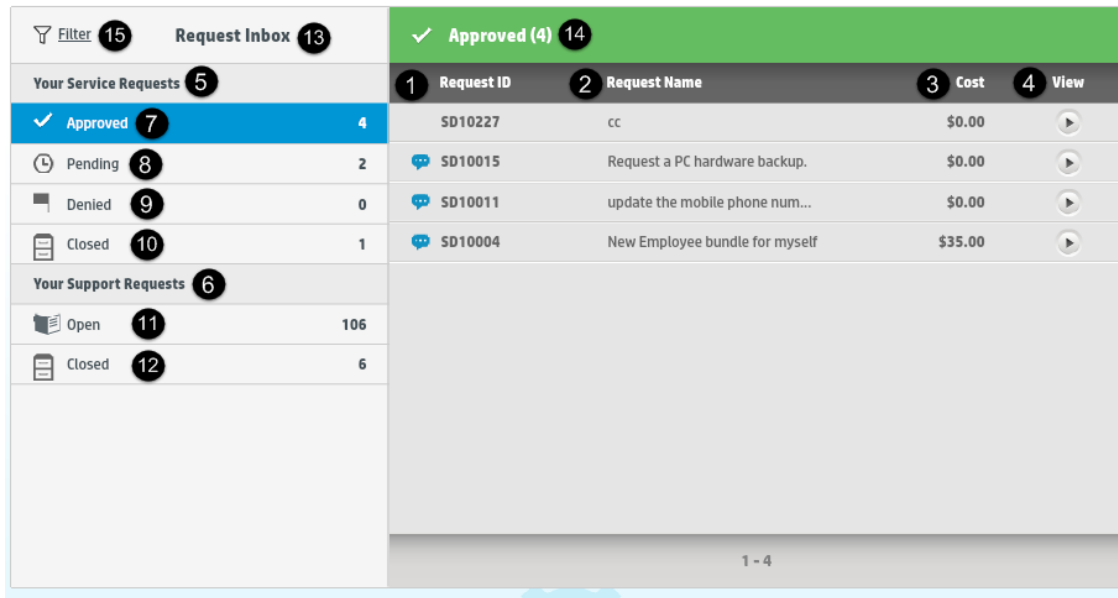
Id	Key	Value
1.	account_view.order_id	Request ID
2.	account_view.title	Request Name
3.	account_view.price	Cost (Price)
4.	account_view.view	View
5.	account_view.your_service_request	Your Service Requests
6.	account_view.your_support_request	Your Support Requests

7.	account_view.status_approved	Approved
8.	account_view.status_pending	Pending
9.	account_view.status_denied	Denied
10.	account_view.status_closed	Closed
11.	account_view.status_open	Open
12.	account_view.status_closed	Closed
13.	account_view.request_inbox	Request Inbox
14.	*This box takes its value from numbers, 7,8,9,10, and 11, as appropriate.	N/A
15.	advancedSearch.panel.filterButton	Filter

Customize the Details View page

Id	Key	Value
1.	account_view.request_placed_on	Request place on ...
2.	account_view.approvers	Approvers
3.	account_view.request_by	Requested By
4.	account_view.contact_info	Contact Information
5.	account_view.fulfillment_summary.renderer_label.id	ID
6.	account_view.fulfillment_summary.renderer_label.title	Title
7.	account_view.fulfillment_summary.renderer_label.status	Status

Customize the Approval history
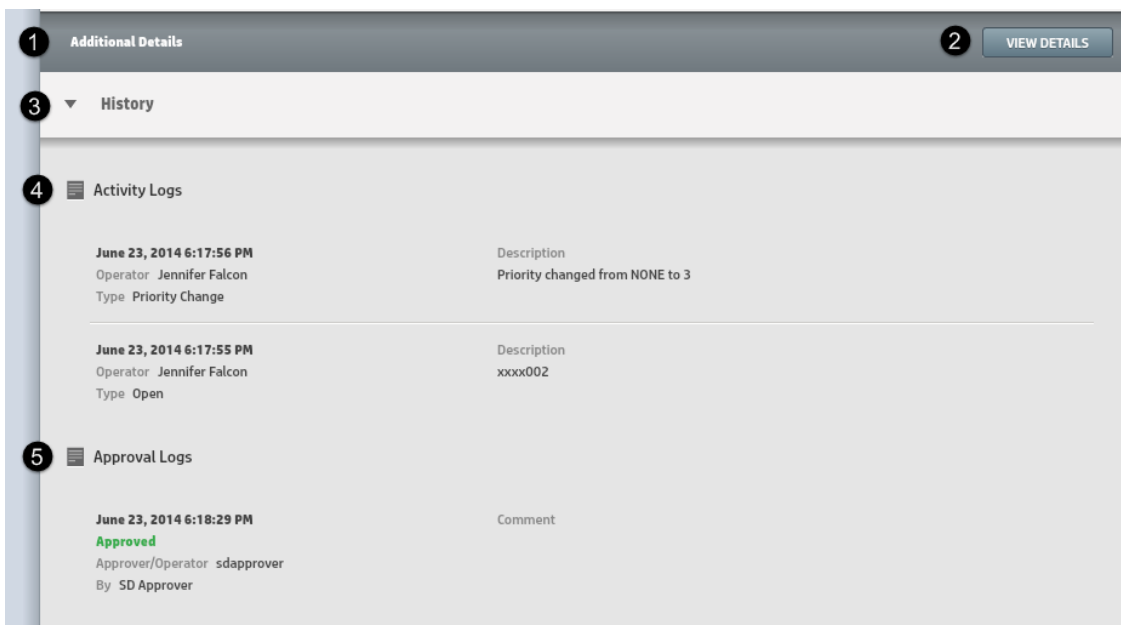
Id	Key	Value
1.	account_view.header_approval_status	Additional Details
2.	account_view.button_hide_approval_history	View Details
3.	interaction_history.section_name.history	History
4.	interaction_history.section_name.activity_logs	Activity Logs
5.	interaction_history.section_name.approval_logs	Approval Logs
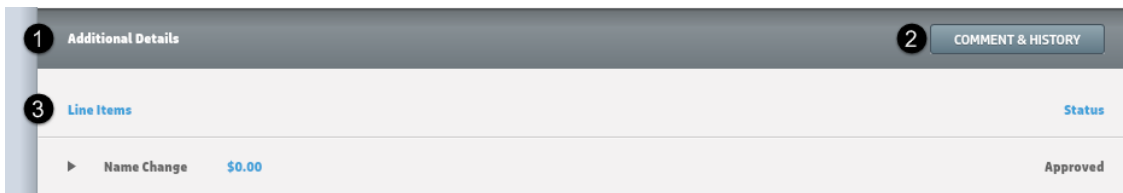
Id	Key	Value
1.	account_view.header_approval_status	Additional Details
2.	account_view.button_view_approval_history	Comment & History
3.	account_view.header_line_items	Line Items

Customize the Request Inbox Welcome page
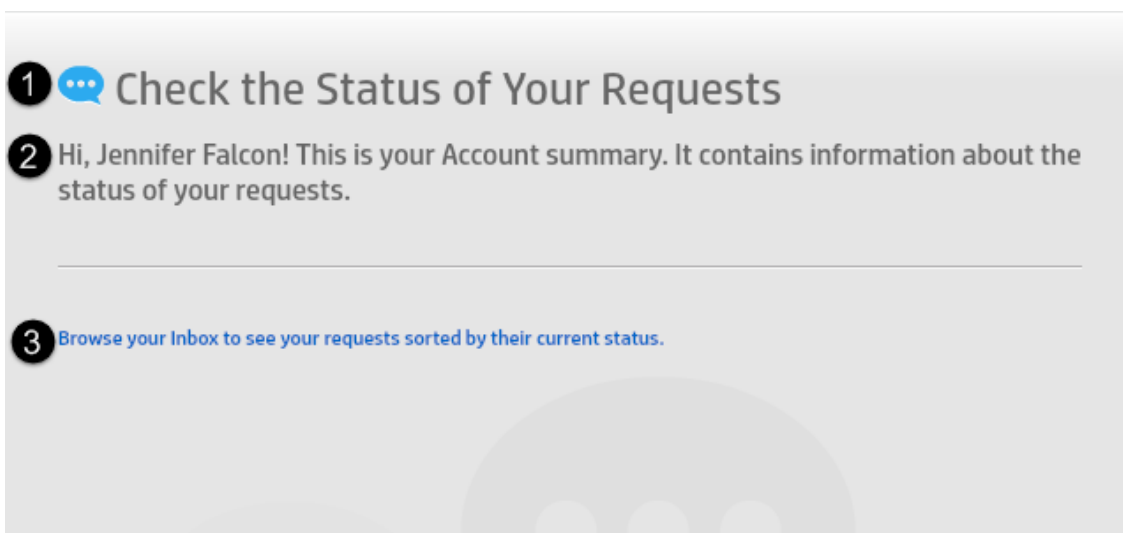
Id	Key	Value
1.	account_view.welcome.header	Check the Status of …
2.	account_view.welcome	Hi, Jennifer …
3.	account_view.instruction	Browser your inbox …

Customize the Browse Catalog button

Id	Key	Value
1.	header.search.openCatalog.button.label	Browse Catalog
2.	header.search.closedCatalog.button.label	Hide Catalog

Customize Your Subscriptions
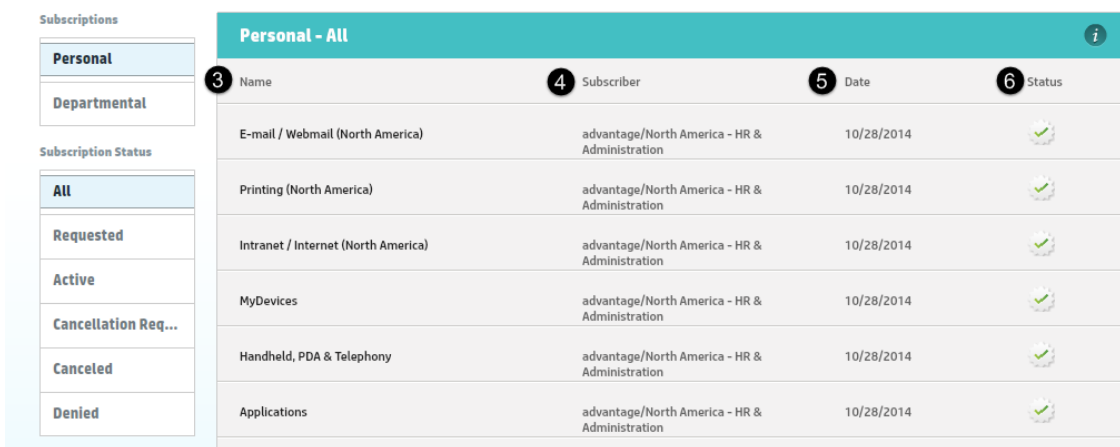
Id	Key	Value
1.	subscription.header.title	Your Subscriptions
2.	subscription.header.description	Track and modify ...
3.	subscription.itemlist.header.name	Name
4.	subscription.itemlist.header.subscriber	Subscriber
5.	subscription.itemlist.header.date	Date
6.	subscription.itemlist.header.status	Status
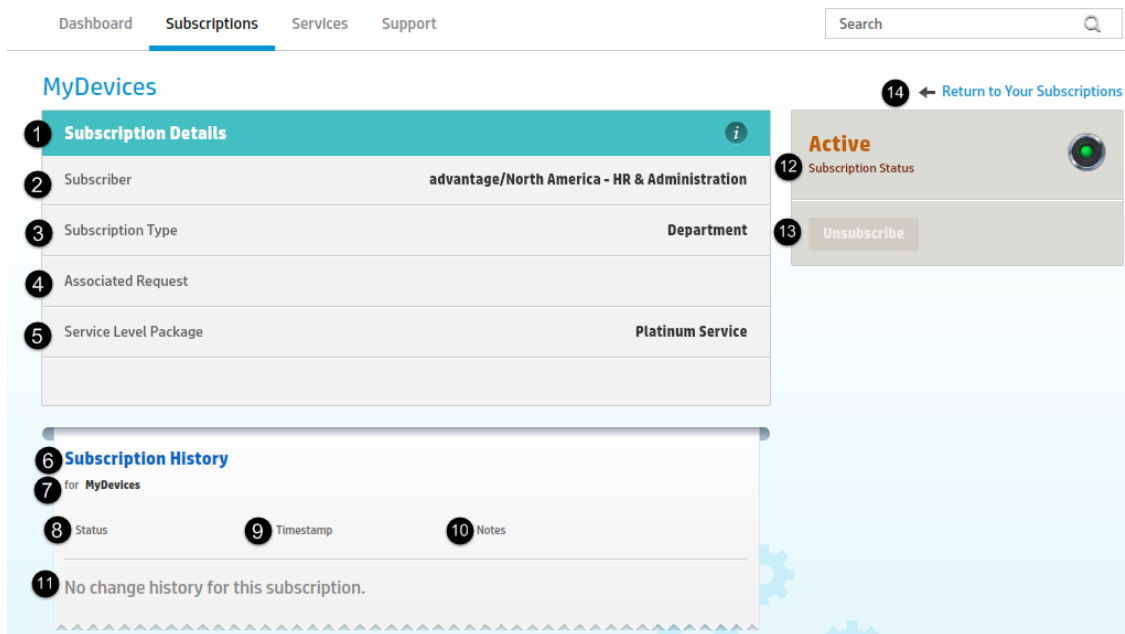
Id	Key	Value
1.	subscription.itemDetail.header.title	Subscription Details
2.	subscription.itemDetail.subscriber	Subscriber
3.	subscription.itemDetail.subscriptionType	Subscription Type
4.	subscription.itemDetail.associatedRequest	Associated Request
5.	subscription.itemDetail.serviceSLA	Service Level Package
6.	subscription.itemDetail.history.title	Subscription History
7.	subscription.itemDetail.history.for	for
8.	subscription.itemDetail.history.status	Status
9.	subscription.itemDetail.history.timestamp	Timestamp
10.	subscription.itemDetail.history.Notes	Notes
11.	subscription.itemDetail.history.noresult	No change history for ...
12.	subscription.itemDetail.contolPanel.statusLabel	Subscription Status
13.	subscription.itemDetail.contolPanel.unsubscriberButton	Unsubscribe
14.	subscription.itemDetail.header.return	Return to Your Subscriptions

Customize the Approvals page

Id	Key	Value
1.	header.title	Your Approvals
2.	header.description	Item that need ...
3.	list.column.id	ID
4.	list.column.title	Title
5.	list.column.type	Type
6.	list.column.requestedFor	Requested for
7.	list.column.date	Date
8.	list.column.cost	Cost

Note: The Approvals Page also requires some customization on the SRC server side. For more information, see "Customize Your Approvals" on page 148

Customize the Service Approval Details page
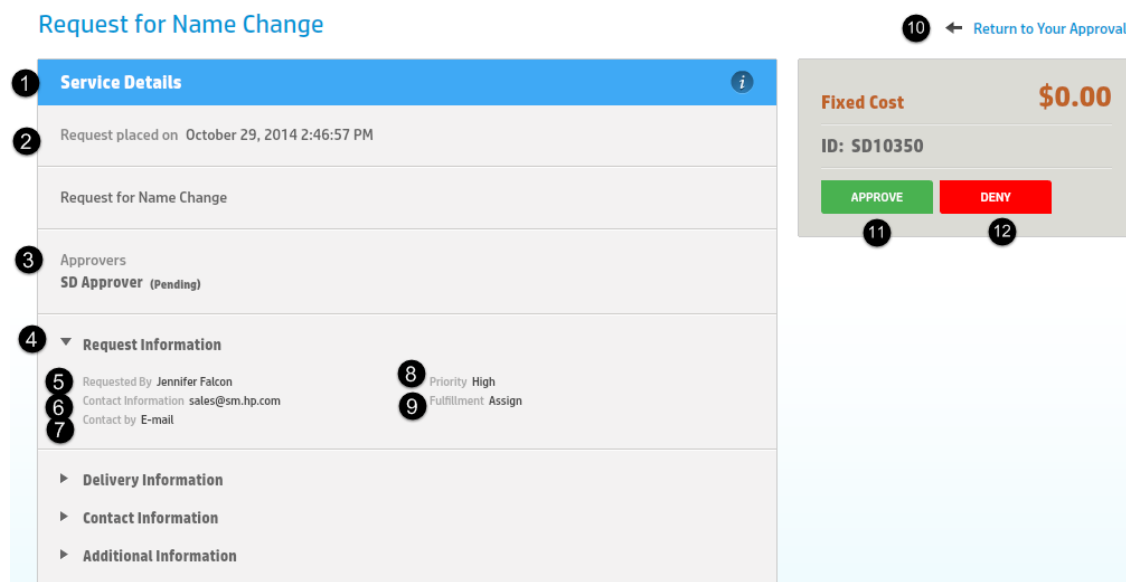
Id	Key	Value
1.	service.detail	Service Details
2.	account_view.request_placed_on	Request Placed on
3.	account_view.approvers	Approvers
4.	request.information	Request Information
5.	account_view.request_by	Requested By
6.	account_view.contact_info	Contact Information
7.	request.information.callbackType	Contact by
8.	request.information.urgency	Priority
9.	request.information.status	Fulfillment
10.	detail.back	Return to Your Approvals
11.	account_view.approve_button	APPROVE
12.	account_view.deny_button	DENY

Customize the Change Approval Details page

Id	Key	Value
1.	approval.change.detail.title	Change Details
2.	approval.change.detail.label.status	Status
3.	approval.change.detail.label.approvalStatus	Approval Status
4.	approval.change.detail.label.currentPhase	Current Phase
5.	approval.change.detail.label.requestedEndDate	Requested End Date
6.	approval.change.detail.label.changeCoordinator	Change Coordinator
7.	approval.change.detail.label.initiatedBy	Initiated By
8.	approval.change.detail.label.assignedGroup	Assigned Group
9.	approval.change.detail.label.affectedConfigurationItem	Affected Configuration Item
10.	approval.change.detail.label.category	Catalog

11.	approval.change.detail.label.subcategory	Subcategory
12.	approval.change.detail.label.impact	Impact
13.	approval.change.detail.label.riskAssessment	Risk Assessment
14.	detail.back	Return to Your Approvals
15.	account_view.approve_button	APPROVE
16.	account_view.deny_button	DENY

Customize the Quote Approval Details page

Id	Key	Value
1.	approval.quote.detail.title	Quote Details
2.	approval.quote.detail.requestedFor	Request For
3.	approval.quote.detail.requestedBy	Request By
4.	approval.quote.detail.requestedOn	Request On
5.	approval.quote.detail.status	Status

6.	approval.quote.detail.approvalStatus	Approval Status
7.	list.column.approvals	Approver
8.	approval.quote.detail.currentPhase	Current Phase
9.	approval.quote.item.title	Items
9.	approval.quote.bundle.title	Bundles
10.	approval.quote.item.id	ID
10.	approval.quote.bundle.id	ID
11.	approval.quote.item.quantity	Quantity
11.	approval.quote.bundle.quantity	Quantity
12.	approval.quote.item.description	Description
12.	approval.quote.bundle.description	Description
13.	approval.quote.item.status	Status
13.	approval.quote.bundle.status	Status
14.	approval.quote.item.price	Cost
14.	approval.quote.bundle.price	Cost
15.	approval.quote.return	Return to your Approvals
16.	account_view.approve_button	APPROVE
17.	account_view.deny_button	DENY

Customize the Search Results page
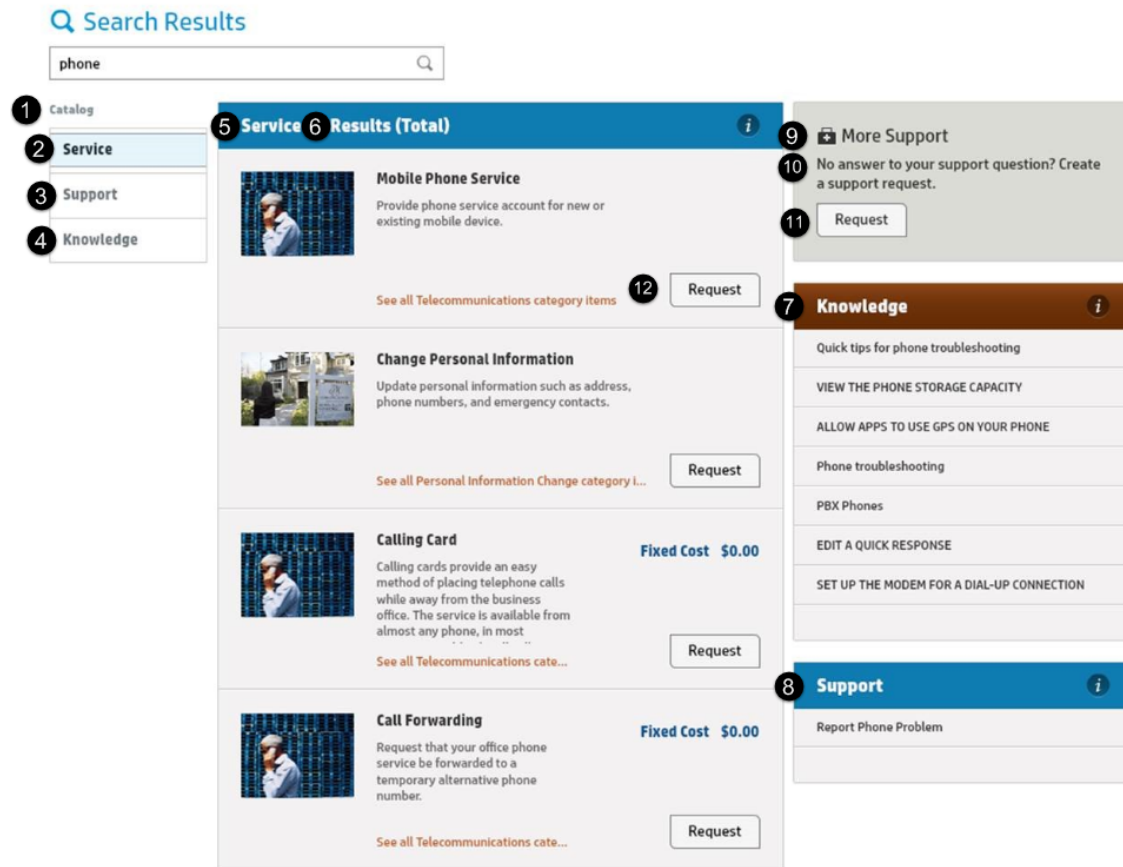
Id	Key	Value
1.	searchView.catalog	Catalog
2.	searchView.service	Service
3.	searchView.support	Support
4.	searchView.knowledge	Knowledge
5.	searchView.header.service	Service
6.	results.number	Results (Total)
7.	searchView.header.knowledge	Knowledge
8.	searchView.header.support	Support
9.	support.generic.request.widget.title	More Support

10.	support.generic.request.widget.message	No answer to …
11.	support.generic.request.widget.button.label	Request (Support)
12.	mainview.item_request_button	Request (Service)

Id	Key	Value
1.	search_facet.km.scope	Search In
2.	search_facet.facet_value_all	All
3.	search_facet.km.scope.externalLink	External Resource
4.	search_facet.km.scope.article	SM Resource
5.	searchView.header.knowledge	Knowledge
6.	results.number	Results (Total)
7.	searchView.header.service	Service
8.	searchView.header.support	Support

Customize the request on Behalf Of

Id	Key	Value
1.	services.impersonate.welcome.header	Click Browse...
2.	services.impersonate.instruction	Remember that....

Customize the Shopping Cart
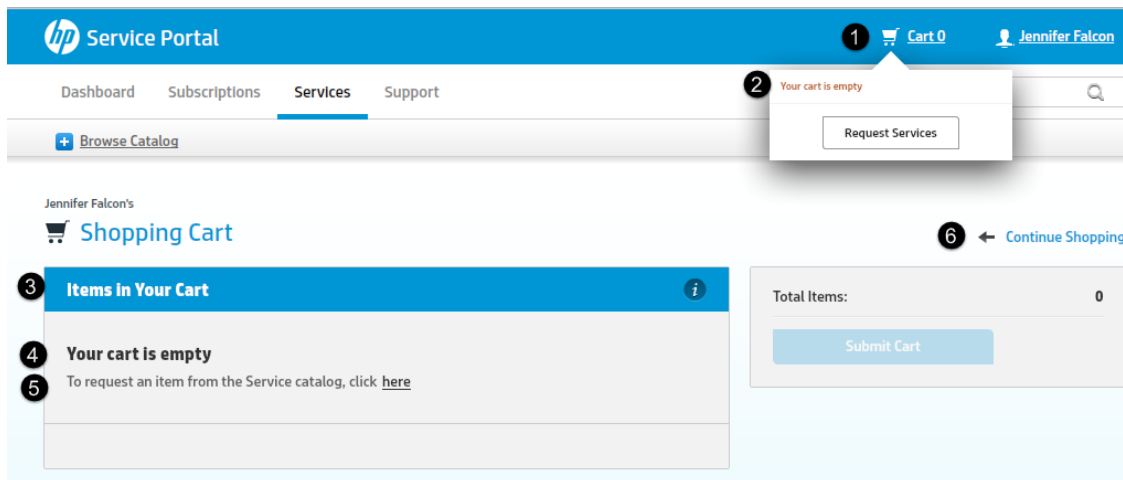

Id	Key	Value
1.	header.savedItem.button.label	Cart
2.	cart_view.cart_empty	Your cart is empty
3.	cart_view.cart.cart_items_header	Items in Your cart
4.	cart_view.cart.empty	Your cart is empty
5.	cart_view.cart.empty_prompt	To request an item …
6.	cart_view.continue_shopping	Continue Shopping

Shopping Cart View
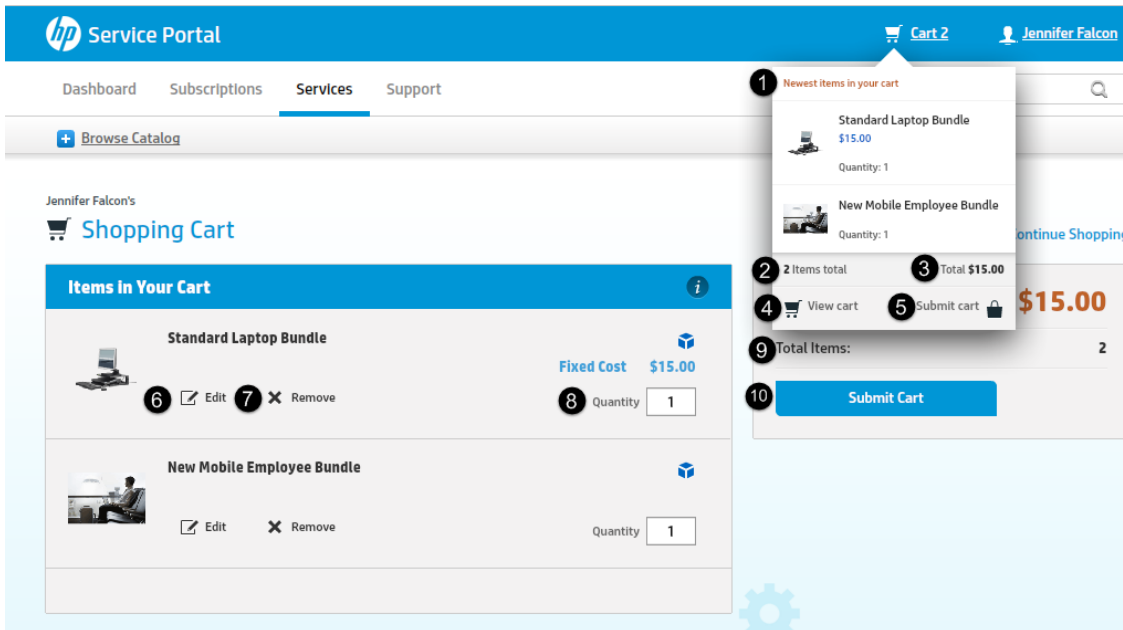
Id	Key	Value
1.	cart_view.mouse_hover_header	Newest Item in Your Cart
2.	cart_view.items_total.several	* Items Total
3.	cart_view.price_total	Total
4.	cart_view.view_cart	View Cart
5.	cart_view.checkout	Submit Cart
6.	cart_view.edit_item_label	Edit
7.	cart_view.remove_item_label	Remove
8.	cart_view.item_quantity	Quantity
9.	quantity.cart.label	Total Items
10.	button.cart.label	Submit Cart

Customize the SRC settings
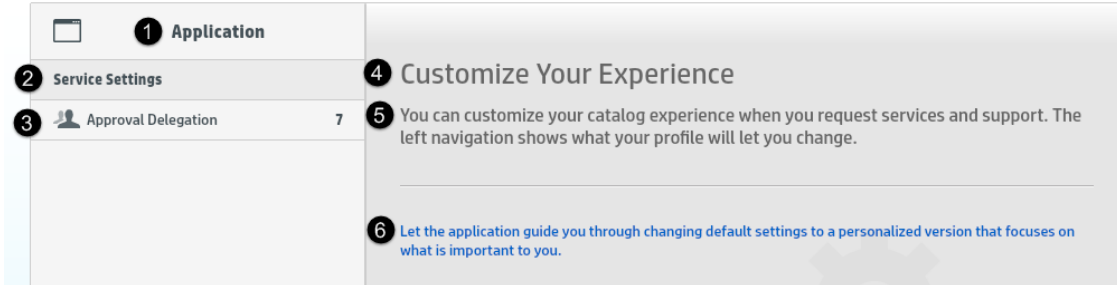
Id	Key	Value
1.	settings.inbox.title	Application
2.	settings.service.title	Service Settings
3.	settings.approvalDelegation.welcome.header	Approval Delegation
4.	settings.welcome.header	Customize Your Experience
5.	settings.welcome	You can customize ...
6.	settings.instruction	Let the application guide ...

Customize the Approval Delegation Details page
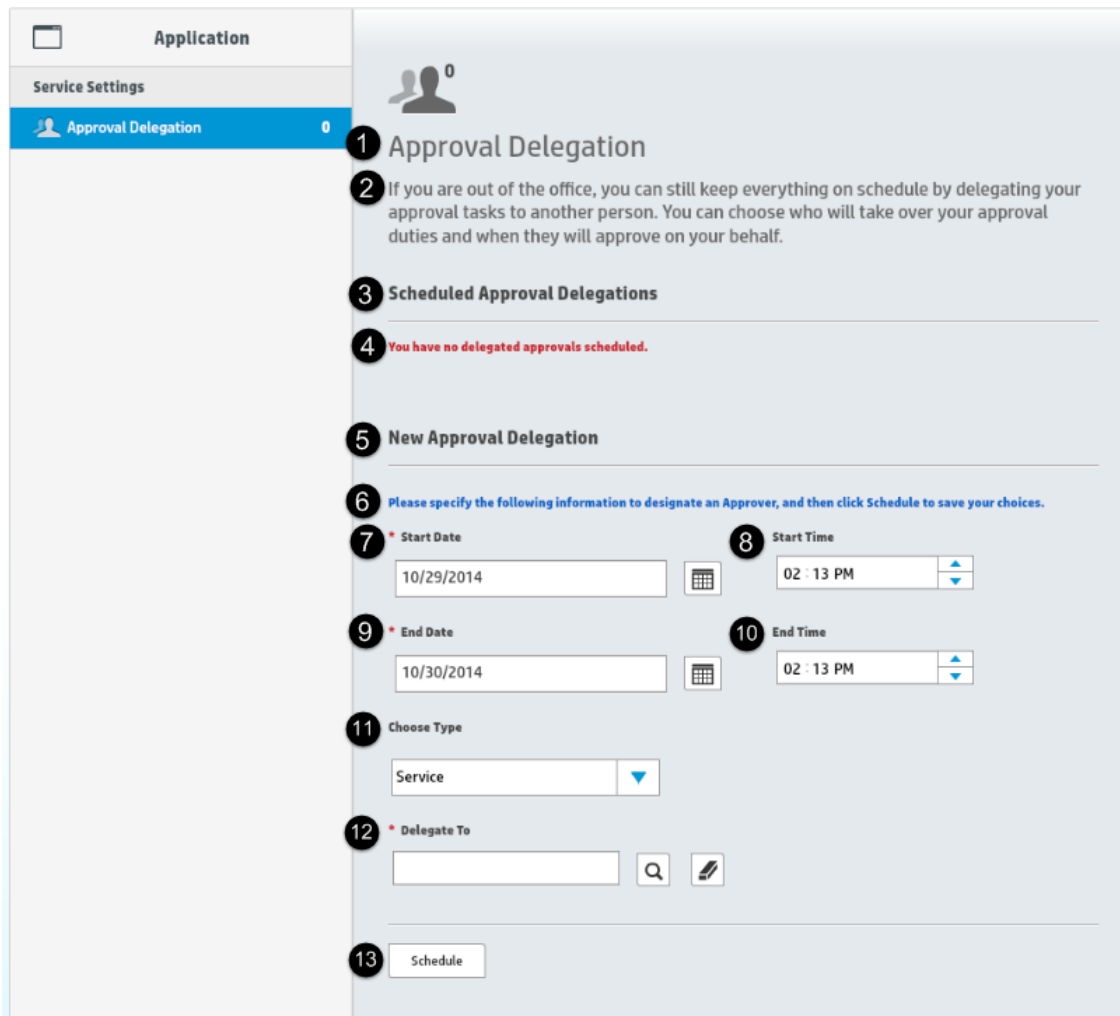
Id	Key	Value
1.	settings.approvalDelegation.welcome.header	Approval Delegation
2.	settings.approvalDelegation.welcome	If you are out of office …
3.	settings.approvalDelegation.list.header	Scheduled Approval …
4.	settings.approvalDelegation.list.no.delegation	You have no …
5.	settings.approvalDelegation.create	New Approval Delegation
6.	settings.approvalDelegation.form.description	Please specify the …

7.	settings.approvalDelegation.startDate.label	Start Date
8.	settings.approvalDelegation.startTime.label	Start Time
9.	settings.approvalDelegation.endDate.label	End Date
10.	settings.approvalDelegation.endTime.label	End Time
11.	settings.approvalDelegation.chooseType	Choose Type
12.	settings.approvalDelegation.delegateTo.label	Delegate To
13.	settings.approvalDelegation.createButton.label	Schedule

Customize the Recurring Cost labels

Id	Key	Value
1.	itemList.recurringPrice.yearly.sm	+ Yearly Fee
2.	itemList.recurringPrice.weekly.sm	+ weekly Fee
3.	itemList.recurringPrice.monthly.sm	+ Monthly Fee
4.	itemList.recurringPrice.daily.sm	+ Daily Fee
5.	itemList.recurringPrice.hourly.sm	+ Hourly Fee

Customize the login panel

Id	Key	Value
1.	login.label.head	Hello and Welcome ...
2.	login.label.username	User Name
3.	login.label.password	Password

4.	login.label.remember	Keep me signed in.
5.	login.label.rememberNote	Do not select if ...
6.	login.label.submit	Sign in
7.	login.label.reset	Clear

Customize the user account settings
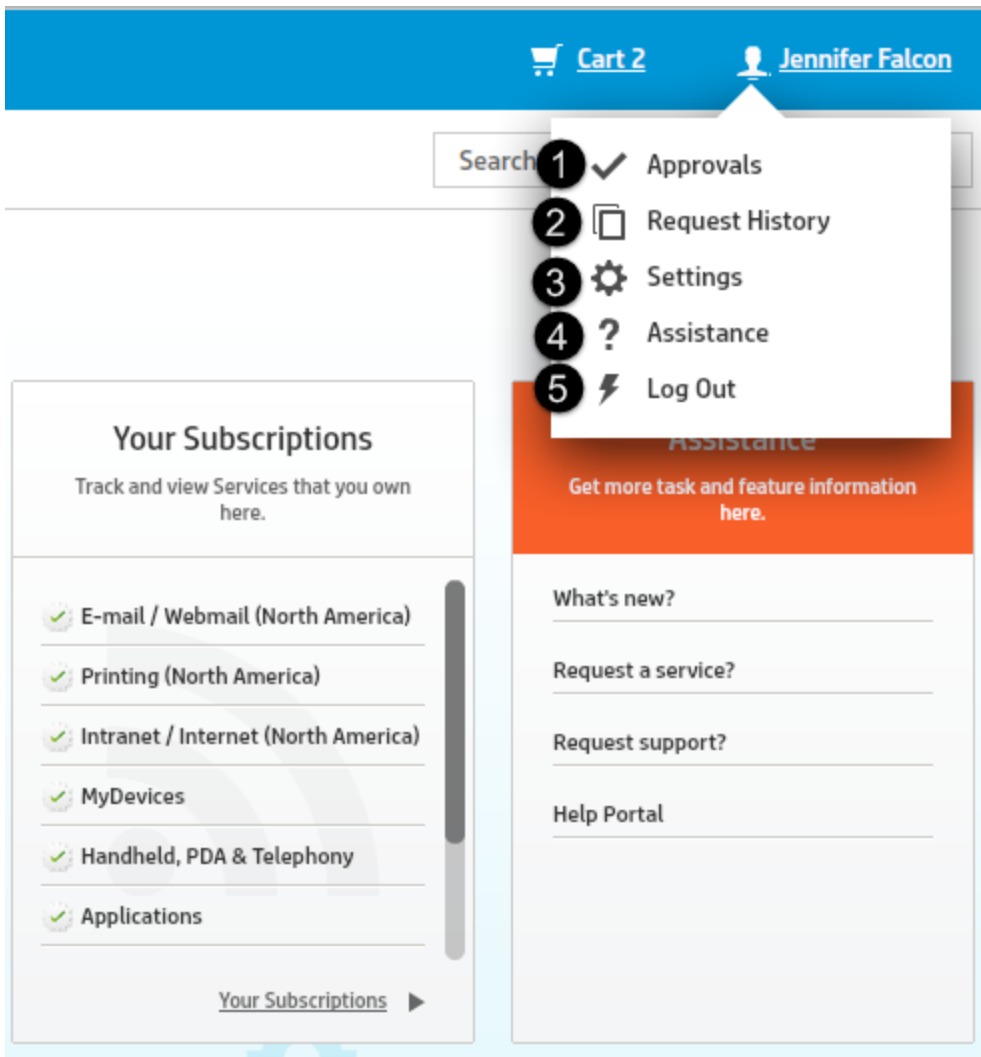
Id	Key	Value
1.	header.user_account.approvals	Approvals
2.	header.user_account.requests	Request History

3.	header.user_account.settings	Settings
4.	header.user_account.logout	Logout
5.	header.user_account.assistance	Assistance

Customize the Request Summary panel
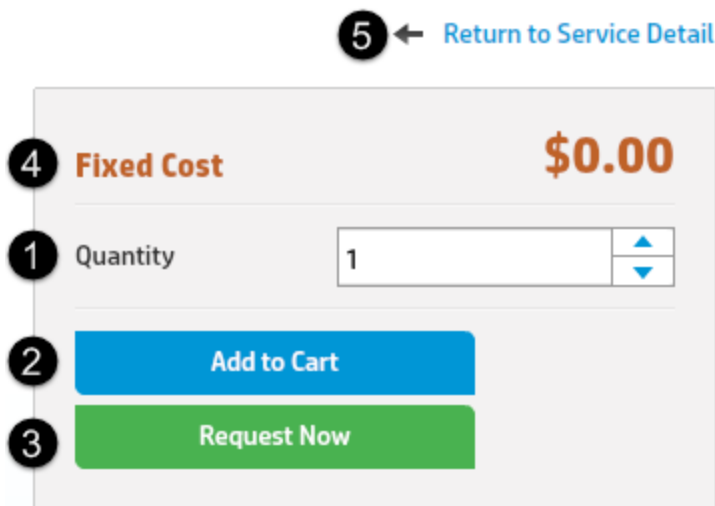
Id	Key	Value
1.	quantity.request.label	Quantity
2.	button.add.cart.label	Add to Cart
3.	button.requestNow.label	Request Now
4.	itemdetails.cost.fixed	Fixed Cost
5.	button.return.to.detail	Return to Service Detail

Customize the Submission panel
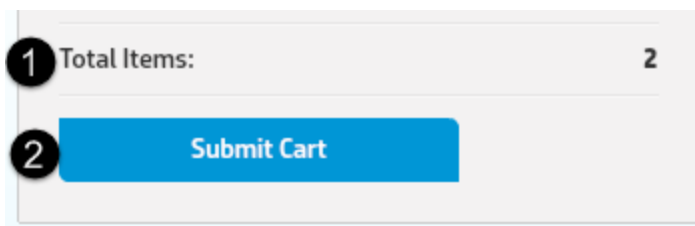
Id	Key	Value
1.	quantity.cart.label	Total Items
2.	button.checkout.label	Submit

Customize the Survey List Page
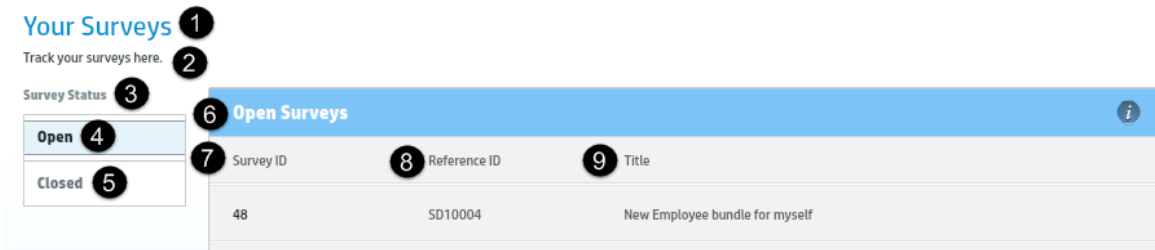
Id	Key	Value
1.	survey.header.title	Your Surveys
2.	survey.header.description	Track your surveys here.
3.	survey.facet.name	Survey Status
4.	survey.facet.open	Open
5.	survey.facet.closed	Closed
6.	survey.list.open	Open Surveys
7.	survey.list.surveyID	Survey ID
8.	survey.list.referenceID	Reference ID
9.	survey.list.title	Title

Id	Key	Value
1.	survey.list.closed	Closed Surveys

Customize the Survey Details Page

Id	Key	Value
1.	survey.detail.pageTitle	Customer Satisfaction Survey
2.	survey.detail.formTitle	Survey Detail
3.	survey.detail.returnButton	Return to Your Surveys
4.	survey.detail.referenceRecord.number	Reference Number
5.	survey.detail.referenceRecord.title	Title
6.	survey.detail.referenceRecord.description	Description
7.	survey.controlPanel.surveyId	Survey ID
8.	survey.controlPanel.submitButton	Submit

9.	survey.answer.interactionRegistration.title	Do you want to register an interaction?
10.	survey.answer.interactionRegistration.normal	No
11.	survey.answer.interactionRegistration.complaint	Register a Complaint
12.	survey.answer.interactionRegistration.compliment	Register a Compliment

Server customization reference

The following user interface labels can be customized in SRC Server customization file, which by default, you can find in the following location:

`/resources/server/xx/CustomServer_xx.properties`

> **Note:** In this example path,the *xx* placeholder represents the language code of your SRC installation.

Customize the Search Results
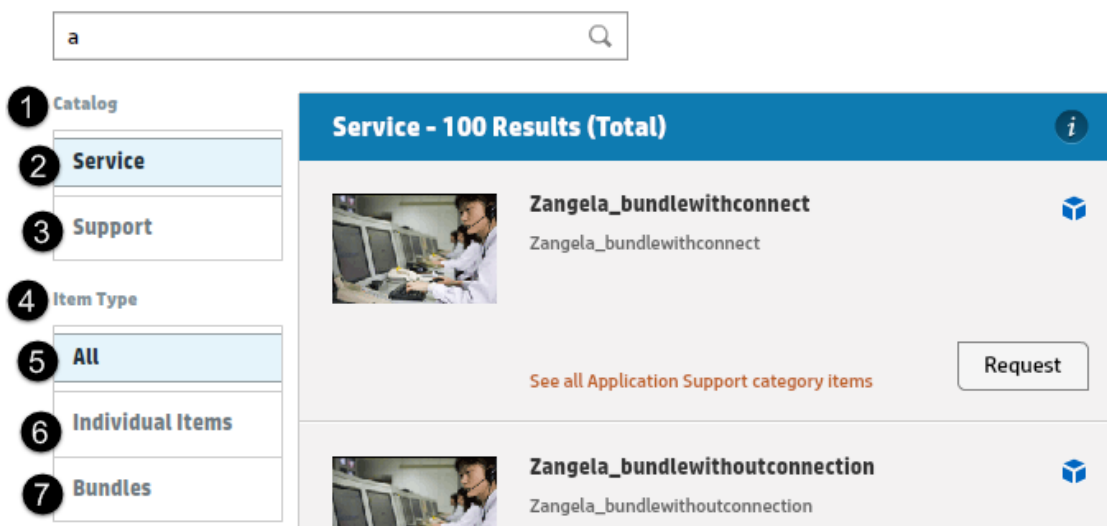
Id	Key	Value
1.	Configure in client custom.properties file	Catalog
2.	Configure in client custom.properties file	Service
3.	Configure in client custom.properties file	Support

4.	search_facet.service.item_type	Item Type
5.	search_facet.facet_value_all	All
6.	search_facet.service.item_type.item	Individual Items
7.	search_facet.service.item_type.bundle	Bundles

Id	Key	Value
8.	search_facet.service.item_status	Request Type
9.	search_facet.facet_value_all	All
10.	search_facet.service.item_status.standard	Regular
11.	search_facet.service.item_status.infoOnly	Info-Only
12.	search_facet.service.item_status.nonCart	Fast Track
13.	search_facet.service.recurring_period	Recurring Period
14.	search_facet.facet_value_all	All
15.	search_facet.service.recurring_period.hour	Hourly

16.	search_facet.service.recurring_period.day	Daily
17.	search_facet.service.recurring_period.week	Weekly
18.	search_facet.service.recurring_period.month	Monthly
19.	search_facet.service.recurring_period.year	Yearly
20.	search_facet.service.recurring_period.nonrecurring	Non Recurring

Customize the order information

Id	Key	Value

1.	group_info.order_info.label	Order Information
2.	order_info.requested_for.label	This request is for
3.	order_info.delivery_sla.label	Delivery Targets
4.	order_info.service_sla.label	Service Level Package
5.	group_info.item_options.label	Item Options

Customize the Subscriptions page

Id	Key	Value
1.	subscription.inbox.group.displayname	Subscriptions
2.	subscription.inbox.group.myuse.displayname	Personal
3.	subscription.inbox.group.department.displayname	Departmental
4.	subscription.inbox.status.displayname	Subscription Status
5.	subscription.status.all	All
6.	Dynamic value	Personal – All

Customize the Knowledge Management results

Id	Key	Value
1.	search_facet.km.doctype	Doc Type
2.	search_facet.km.category	Category
3.	search_facet.facet_value_all	All
4.	search_facet.facet_value_all	All
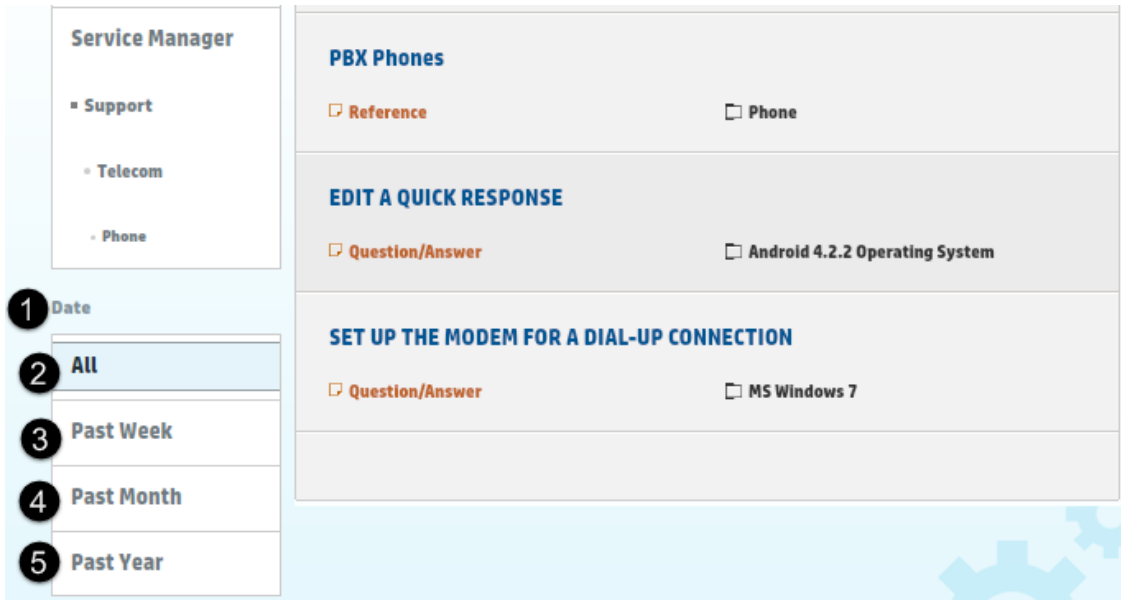
Id	Key	Value
1.	search_facet.km.last_updated	Date
2.	search_facet.facet_value_all	All
3.	search_facet.km.last_updated.week	Past Week
4.	search_facet.km.last_updated.month	Past Month
5.	search_facet.km.last_updated.year	Past Year

Customize Your Approvals
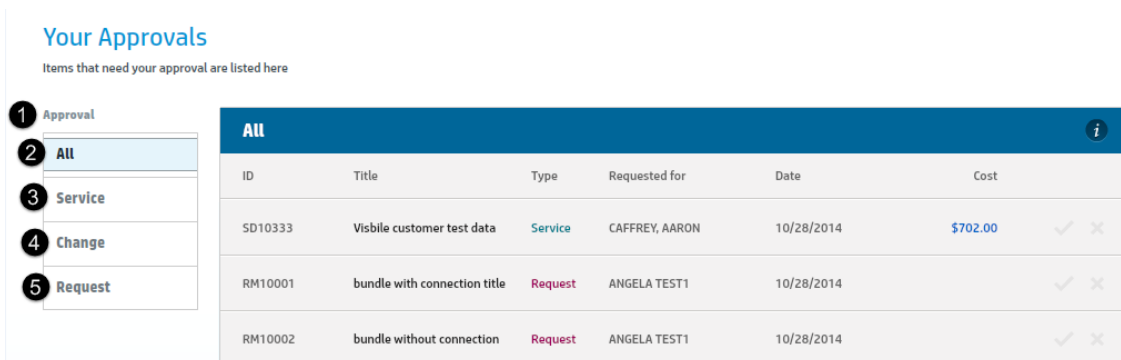
Id	Key	Value
1.	search_facet.approval.type	Approval

2.	search_facet.facet_value_all	All
3.	search_facet.approval.type.service	Services
4.	search_facet.approval.type.change	Change
5.	search_facet.approval.type.quote	Quote

Note: The Approvals Page also requires some customization on the SRC client side. For more information, see "Customize the Approvals page" on page 124

Customize the Request For panel

Id	Key	Value
1.	group_info.order_info_support.label	Support Recipient (Support Catalog/Generic Support)

1.	group_info.order_info.label	Order Information (Service Catalog)
2	order_info.requested_for.label	This request is for
3.	support_attachments.support_ attachments_label	Attachments (Support Catalog/Generic Support)
3.	attachments_info.attachments_info_ label	Attachments (Service Catalog)

SRC Service Manager customization reference

You must customize the following fields in Service Manager. To do this, edit the SRC checkout panels by navigating to **Tailoring** > **SRC Tailoring** > **Checkout Panel** in Service Manager. For more information on how to customize and configure the SRC checkout panels, see .

Expand All   Collapse All

1 ∧ **Delivery Information**   *i*

2 * Title

3 Description

4 ∧ **Contact Information**   *i*

5 * Contact Name

FALCON, JENNIFER   🔍   ✎

6 * Contact Method

E-mail   ▼

7 ∧ **Additional Information**   *i*

8 * Urgency

Select one   ▼

∧ **Attachments**   *i*

Id	Value
1	Delivery Information
2	Title
3	Description
4	Contact Information

5	Contact Name
6	Contact Method
7	Additional Information
8	Urgency

Style Service Request Catalog only for the desktop

The following graphics and keys show the different labels of the SRC user interface that you can customize Service Request Catalog for a desktop only experience.

Customize colors and graphics

You can change the interface colors and introduce customization that echoes your company's signature branding and color palette.

Service Request Catalog packages files that you can edit to change the basic application design and color palette. You can also redesign the backgrounds for the header, main, and footer areas. You do not need to be a designer or a programmer to make these changes. Obtain the required tools and follow the directions in this section.

Before you begin

Customization of most of the graphics and images of Service Request Catalog is performed by modifying the symbols in the `panel.fla` file and replacing the `panel.swf` used in SRC. The symbols in the `panel.fla` file each correspond to a graphic, image, or text area in the SRC.

You can find the `panel.swf` file and the `panel.fla`in the following location:

`<SRC_Root_Folder>\secure\configuration\default`

> **Note:**
>
> - <SRC_Root_Folder> refers to the Web application server where you installed SRC.
>
> - Before you attempt to replace the `panel.swf` file, we recommend that you make a copy and store it in a convenient location. You should perform all your adjustments on the copy first.
>
> - You need to obtain Adobe® Flash® Professional CS5.x (or a later release) to edit the relevant files.You may also need an image editing application, such as Adobe® Illustrator® or Adobe® Photoshop®.
>
> - Make sure you have your corporate branding color values (expressed in hexadecimal numbers) handy.

Modifying panel.swf

To modify `panel.swf` and customize Service Request Catalog, follow these steps:

> **Note:** You cannot change the name of the `panel.swf` file. SRC will search only for the name `panel.swf`.

1. Open `panel.fla` in Flash Professional CS5.x, and note the various symbols. You should see symbols for the background, header, footer, logo, and other elements of the SRC user interface.

2. Select a symbol that you wish to modify.

3. By default, Flash Professional CS 5.x provides numerous panels on the right side of the screen. These panels allow you to access the properties of the symbol that you selected. You can choose to adjust the color, gradient of the various symbols. For example, you may click on the symbol for the background, and use the color panel to specify a background that matches your organization's branding.

4. When you have finished modifying the symbols, make sure that all symbols are under the "Illustrator Symbols" folder in the Library panel in Flash Professional. During the process of manipulating the symbols, Flash Professional may have moved the symbols from their original hierarchy in the Library Panel.

5. Export the file as a `panel.swf` file.

6. Stop any running instances of SRC.

7. Copy the `panel.swf` file that you exported in Step 4, and then navigate to where the current `panel.swf` is installed. By default, this folder in the following location:

   `<SRC_Root_Folder>\secure\configuration\default`

8. Rename the current `panel.swf` to `panel.OLD` to ensure that you maintain an original copy, and then paste your modified `panel.swf` into the same directory. Move the `panel.OLD` file to a safe location.

9. Restart Service Request Catalog. You should see the modifications you made to the SRC user interface.

> **Note:** By manipulating the symbols in the `panel.swf` file, you can customize almost all of the

graphical aspects of SRC. This includes the your corporate logo, which you can adjust by replacing the current logo in `panel.swf`. However, you should be careful not to adjust the following:

- Size: Adjusting the size of the symbols can lead to unpredictable results and may cause a poor user experience. SRC is designed with most elements at specific sizes.

- Nine scale slicing: Manipulating Nine-scale slicing can cause some symbols to become distorted in unintended ways, so that the symbols may be too large or small, or distorted.

- Names: Do not change the names of any of the symbols or their corresponding associations.

Handling empty symbols

Some symbols in `panel.swf` may be blank or empty by default. For example, the backgroundImage symbol contains no image by default. However, you may wish to add a picture to that will appear as the backdrop to your users' SRC experience

Similarly, you may wish to remove some symbols. To do this, simply reset the symbol with a blank graphic.

Caution: Do not delete any symbol.

Modifying the favorite icon

The favorite icon is displayed in the browser tab header. By default, this icon is the HP logo. However, you can replace this logo with your organization's logo by replacing the `favicon.ico` file located in the Service Request Catalog root folder. Note that the size for this icon must be 16 x 16 pixels.

Note: Make sure that the .ico file is an icon type file.
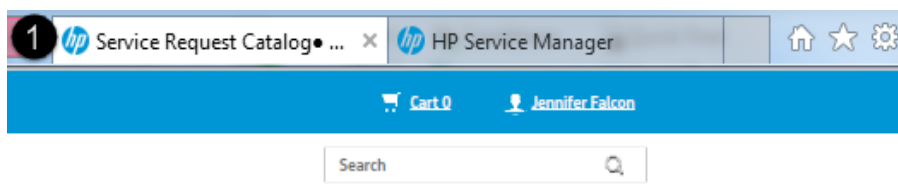
Customize the text format

You may want to make changes to the appearance of text in the application. You can control fonts, text color, and size in the header and footer areas by customizing the `style.css` file.

Text manipulation overview

Text styles, font, weight, and other characteristics are controlled by the `styles.swf` file. You can locate the `styles.swf` file at the following location:

`<SRC_Root_Folder>\src\secure\configuration\default`

However, the `styles.swf` file is an auto-generated .swf file derived from the corresponding `styles.css` file. Cascading Style Sheets are a well-known standard you can use easily configure attractive looking text according to your organization's branding guidelines. To convert the `styles.css` file to a `styles.swf` file, you must used the Adobe Flex Software Development Kit (SDK) compiler. You can download this open-source compiler from the following Web site: www.Adobe.com

Converting `styles.css` to `styles.swf`

Once you have downloaded the compiler, you can use it to convert the `styles.css` file to a `styles.swf` file. To do this, follow these steps:

1. Extract the compiler to an easily accessible folder.

2. Add the location of the mxml compiler to the Path environment variable.

3. Open a command prompt, and then navigate to the location where you stored the `styles.css`.

4. Enter the following command at the command prompt:

   `mxmlc styles.css`

   > **Note:** If SRC end users do not have the access to the Internet, enter the following command at the command prompt:
   >
   > `mxmlc styles.css -static-link-runtime-shared-libraries=true`

5. When you do this, the compiler should generate the `styles.swf` file. Copy the `styles.swf` file, and replace the original `styles.swf` in the following location:

   `<SRC_Root_Folder>\src\secure\configuration\default`

   > **Note:** Make sure that you make a copy of the original `styles.swf` file and store it in a safe place.

Customize the font family

The out-of-box font style in Service Request Catalog 9.41 is HP Simplified, but you may want to change your current font style to Service Request Catalog 1.40. The following configuration files enable you to make the change:

- `style(oob).css`

  The out-of-box `.css` file is only for your reference.

- `style(modified).css`
  Demonstrates the steps that are required to change the HP Simplified font style to Service Request Catalog 1.40.

- The font folder

  Includes all the necessary font files.

- `style(modified).swf`
  A `.swf` file which is converted from the `style(modified).css` file

There are two circumstances in which you change the current font style to Service Request Catalog 1.40. Therefore, before you make the change, you must decide which of the following circumstances applies to you:

- If your `style.css` and `style.swf` are out-of-box files, you only need to rename `style (modified).swf` as `style.swf`, and then copy it to replace your old `style.swf` under the following path:

  `<SRC_Root_Folder>\src\secure\configuration\default`

- If your `style.css` and `style.swf` are not out-of-box files, you need to integrate the `style (modified).css` file into the `style.css` file. For more information, refer to "Integrate style (modified).css into style.css" below.

Integrate `style(modified).css` into `style.css`

The `style(modified).css` file demonstrates all the necessary steps to customize the font style in Service Request Catalog 1.40. Since you have modified your `style.css` before, you should integrate the

style(modified).css file to your style.css file to keep all your previous modifications. To do this, follow these steps:

1. Open the following file in a text editor.

   <SRC_Root_Folder>\src\secure\configuration\default\style.css

2. Insert the following lines at the start of the file.

```
@namespace s "library://ns.adobe.com/flex/spark";
@namespace componentsCommon
"com.hp.service.catalog.client.components.common.*";
@namespace lookup "com.hp.siberia.component.formInput.lookup.*";
@namespace renderer
"com.hp.siberia.skin.component.renderer.formInput.graphic.*";

@font-face {
fontFamily: "Collator";
src: url("font/Collator.otf");
embedAsCFF: true;
}
@font-face {
fontFamily: "Gotham";
src: url("font/Gotham-Book.otf");
embedAsCFF: true;
}
@font-face {
fontFamily: "Gotham";
src: url("font/Gotham-BookItalic.otf");
fontStyle: italic;
embedAsCFF: true;
}
@font-face {
fontFamily: "Gotham";
src: url("font/Gotham-Medium.otf");
fontWeight: bold;
embedAsCFF: true;
}
@font-face {fontFamily: "Gotham";
src: url("font/Gotham-MediumItalic.otf");
fontWeight: bold;
fontStyle: italic;
embedAsCFF: true;
}
```

3. Optional. If you no longer need the HP Simplified font style, remove all the @font-face entries that contain HPSimplified.

> **Note:** This step is not demonstrated in the `style(modified).css` file.

4. Change the font-family of existing selectors to `Collator` or `Gotham` to align with the original style of Service Request Catalog 1.40.

5. Insert the following lines at the end of the file.

```
s|ButtonBase.small, s|ButtonBase.basic,
s|ButtonBase.gelBlue, s|ButtonBase.gelGreen, s|ButtonBase.gelOrange,
s|ButtonBase.actionButton,
s|ButtonBase.widgetButton,s|ButtonBase.unsubscribeBtn {
font-family: "Gotham";
}
s|TextInput,
s|TextInput.graphic, lookup|Lookup #input,
s|TextArea.graphic,
s|NumericStepper.graphic,
s|DropDownList.graphic,
s|ToggleButtonBase.graphic,
s|NumericStepper.graphic,
s|CheckBox.graphic,
s|RadioButton.graphic,
renderer|GraphicBackgroundItemRenderer,
componentsCommon|TimeSpinner.graphic,
s|CheckBox.optional {
font-family: "Gotham";
}

.attachmentLink, .attachmentLinkHover,
.attachmentButtonTextGrey, .attachmentButtonTextWhite,
.pageRangesPaginatorButton, .pageRangesPaginatorSkin,
.pageRangesPaginatorPageRangeContainer, .pageRangeNormal {
font-family: "Gotham";
}

s|TextBase.h1, s|RichEditableText.h1, s|ButtonBase.h1 {
font-family: "Collator";
}
s|TextBase.h2, s|RichEditableText.h2, s|ButtonBase.h2 {
font-family: "Collator";
}
s|TextBase.h3, s|RichEditableText.h3, s|ButtonBase.h3 {
font-family: "Gotham";
}
s|TextBase.h4, s|RichEditableText.h4, s|ButtonBase.h4 {
font-family: "Gotham";
```

```
}
s|TextBase.h5, s|RichEditableText.h5, s|ButtonBase.h5 {
font-family: "Gotham";
}
s|TextBase.h6, s|RichEditableText.h6, s|ButtonBase.h6 {
font-family: "Gotham";
}
s|TextBase.h7, s|RichEditableText.h7, s|ButtonBase.h7 {
font-family: "Gotham";
}
s|TextBase.h8, s|RichEditableText.h8, s|ButtonBase.h8 {
font-family: "Gotham";
}
s|TextBase.h9, s|RichEditableText.h9, s|ButtonBase.h9 {
font-family: "Gotham";
}
s|TextBase.h10, s|RichEditableText.h10, s|ButtonBase.h10 {
font-family: "Gotham";
}
s|TextBase.h11, s|RichEditableText.h11, s|ButtonBase.h11 {
font-family: "Gotham";
}
s|TextBase.h12, s|RichEditableText.h12, s|ButtonBase.h12 {
font-family: "Gotham";
}
s|TextBase.p1, s|RichEditableText.p1, s|ButtonBase.p1 {
font-family: "Gotham";
}
s|TextBase.p2, s|RichEditableText.p2, s|ButtonBase.p2 {
font-family: "Gotham";
}
s|TextBase.p3, s|RichEditableText.p3, s|ButtonBase.p3 {
font-family: "Gotham";
}
s|TextBase.p4, s|RichEditableText.p4, s|ButtonBase.p4 {
font-family: "Gotham";
}
s|TextBase.p5, s|RichEditableText.p5, s|ButtonBase.p5 {
font-family: "Gotham";
}
s|TextBase.p6, s|RichEditableText.p6, s|ButtonBase.p6 {
font-family: "Gotham";
}
s|TextBase.p7, s|RichEditableText.p7, s|ButtonBase.p7 {
font-family: "Gotham";
}
s|TextBase.p8, s|RichEditableText.p8, s|ButtonBase.p8 {
```

```
font-family: "Gotham";
}
```

6. Save your modifications, and then convert your modified style.css file into a `style.swf` file.
   For more information, see the "Converting styles.css into styles.swf" section in .

7. Replace the original `style.swf` file with the newly converted one under the following path:

   `<SRC_Root_Folder>\src \secure\configuration\default`

8. Restart Service Request Catalog. You should see the modifications you made to the Service Request Cataloguser interface.

   > **Note:** If the fonts have not changed, clear your browser cache and then restart Service Request Catalog again.

The style.css file

The content below is provided as a convenient reference for the default style.css file that is included with SRC.

> **Note:** This file is only used for customizing the `.swf` files for Service Request Catalog on the desktop.

```
/* CSS file */

@font-face {
      fontFamily: HPSimplified;
      src: url("font/HPSimplified_Rg.ttf");
      embedAsCFF: true;
}
@font-face {
      fontFamily: HPSimplified;
      src: url("font/HPSimplified_It.ttf");
      fontStyle: italic;
      embedAsCFF: true;
}
@font-face {
      fontFamily: HPSimplified;
      src: url("font/HPSimplified.ttf");
      fontWeight: bold;
      embedAsCFF: true;
}
```

```
@font-face {
       fontFamily: HPSimplified;
       src: url("font/HPSimplified_BdIt.ttf");
       fontWeight: bold;
       fontStyle: italic;
       embedAsCFF: true;
}

/*
text shape
*/

.headerTitle {
       font-size: 21;
       color: #333333;
       font-family: HPSimplified;
}

.headerCartLink{
       font-size: 14;
       color: #333333;
       textDecoration: "underline";
       font-family: HPSimplified;
}

.headerUserDropdownLabel{
       font-size: 14;
       color: #333333;
       textDecoration: "underline";
       font-family: HPSimplified;
}

.launcherTitle{
       font-size: 24;
       color: #435057;
       font-family: HPSimplified;
}

.launcherSubtitle{
       font-size: 11;
       color: #71828C;
       font-family: HPSimplified;
}

.bodyTitle{
       font-size: 24;
       color: #0096d6;
       font-family: HPSimplified;
}
```

```
.bodySubtitle{
        font-size: 12;
        color: #435057;
        font-family: HPSimplified;
}

.backLabel{
        font-size: 14;
        color: #0096d6;
        font-family: HPSimplified;
}

.footerTitle{
        font-size: 18;
        color: #333333;
        font-family: HPSimplified;
}

.footerSubtitle{
        font-size: 12;
        color: #333333;
        font-family: HPSimplified;
}

.footerLink{
        font-size: 14;
        color: #0096d6;
        text-decoration: "underline";
        font-family: HPSimplified;
}

.footerHelpLink{
        font-size: 12;
        color: #666666;
        text-decoration: "underline";
        font-family: HPSimplified;
}

.footerCompanyLabel{
        font-size: 12;
        color: #666666;
        font-family: HPSimplified;
}

.footerLegalNoticeLabel{
        font-size: 12;
        color: #666666;
        text-decoration: "underline";
```

```
        font-family: HPSimplified;
}

.navigationLabelUp{
        font-size: 15;
        color: #666666;
        font-family: HPSimplified;
}
.navigationLabelSelected{
        font-size: 15;
        color: #ffffff;
        font-family: HPSimplified;
}
.navigationLabelOver{
        font-size: 15;
        color: #000000;
        font-family: HPSimplified;
}
```

The style(modified).css file

The content below is provided as a convenient reference for the default style(modified).css file that is included with SRC.

> **Note:** This file is only used for customizing the `.swf` files for Service Request Catalog on the desktop.

```
/* CSS file */
@namespace s "library://ns.adobe.com/flex/spark";
@namespace componentsCommon    "com.hp.service.catalog.client.components.common.*";
@namespace lookup "com.hp.siberia.component.formInput.lookup.*";
@namespace renderer "com.hp.siberia.skin.component.renderer.formInput.graphic.*";

/*
embed font files
*/
@font-face {
fontFamily: "Collator";
src: url("font/Collator.otf");
embedAsCFF: true;
}
@font-face {
fontFamily: "Gotham";
src: url("font/Gotham-Book.otf");
embedAsCFF: true;
}
```

```
@font-face {
fontFamily: "Gotham";
src: url("font/Gotham-BookItalic.otf");
fontStyle: italic;
embedAsCFF: true;
}
@font-face {
fontFamily: "Gotham";
src: url("font/Gotham-Medium.otf");
fontWeight: bold;
embedAsCFF: true;
}
@font-face {
fontFamily: "Gotham";
src: url("font/Gotham-MediumItalic.otf");
fontWeight: bold;
fontStyle: italic;
embedAsCFF: true;
}

/*
You can remove the four @font-face below
if you no long need "HPSimplified"
*/
@font-face {
fontFamily: "HPSimplified";
src: url("font/HPSimplified_Rg.ttf");
embedAsCFF: true;
}
@font-face {
fontFamily: "HPSimplified";
src: url("font/HPSimplified_It.ttf");
fontStyle: italic;
embedAsCFF: true;
}
@font-face {
fontFamily: "HPSimplified";
src: url("font/HPSimplified.ttf");
fontWeight: bold;
embedAsCFF: true;
}
@font-face {
fontFamily: "HPSimplified";
src: url("font/HPSimplified_BdIt.ttf");
fontWeight: bold;
fontStyle: italic;
embedAsCFF: true;
}
```

```
/*
text shape
*/

.headerTitle {
font-family: "Collator";
font-size: 21px;
color: #333333;
}

.headerCartLink{
font-family: "Gotham";
font-size: 14px;
color: #333333;
textDecoration: "underline";
}

.headerUserDropDownLabel{
font-family: "Gotham";
font-size: 14px;
color: #333333;
textDecoration: "underline";
}

.footerTitle{
font-family: "Collator";
font-size: 21px;
color: #333333;
}

.footerSubTitle{
font-family: "Gotham";
font-size: 12px;
color: #333333;
}

.footerLink{
font-family: "Gotham";
font-size: 14px;
color: #0096d6;
}

.footerHelpLink{
font-family: "Gotham";
font-size: 11px;
color: #666666;
}

.footerCompanyLabel{
```

```
font-family: "Gotham";
font-size: 11px;
color: #666666;
}

.footerLegalNoticeLabel{
font-family: "Gotham";
font-size: 11px;
color: #666666;
}

.navigationLabelUp{
font-family: "Gotham";
font-size: 17px;
font-weight: normal;
color: #666666;
text-drop-shadow-alpha: 0.25;
}
.navigationLabelSelected{
font-family: "Gotham";
font-size: 17px;
font-weight: normal;
color: #ffffff;
text-drop-shadow-alpha: 0.25;
}
.navigationLabelOver{
font-family: "Gotham";
font-size: 17px;
font-weight: normal;
color: #000000;
text-drop-shadow-alpha: 0.25;
}
.navigationLabelDisabled{
font-family: "Gotham";
font-size: 17px;
font-weight: normal;
color: #CCCCCC;
text-drop-shadow-alpha: 0.25;
}

/*
override built-in font styles
*/
s|ButtonBase.small, s|ButtonBase.basic,
s|ButtonBase.gelBlue, s|ButtonBase.gelGreen, s|ButtonBase.gelOrange,
s|ButtonBase.actionButton, s|ButtonBase.widgetButton,s|ButtonBase.unsubscribeBtn {
font-family: "Gotham";
}
```

```
s|TextInput,
s|TextInput.graphic,
lookup|Lookup #input,
s|TextArea.graphic,
s|NumericStepper.graphic,
s|DropDownList.graphic,
s|ToggleButtonBase.graphic,
s|NumericStepper.graphic,
s|CheckBox.graphic,
s|RadioButton.graphic,
renderer|GraphicBackgroundItemRenderer,
componentsCommon|TimeSpinner.graphic,
s|CheckBox.optional {
font-family: "Gotham";
}

.attachmentLink, .attachmentLinkHover,
.attachmentButtonTextGrey, .attachmentButtonTextWhite,
.pageRangesPaginatorButton, .pageRangesPaginatorSkin,
.pageRangesPaginatorPageRangeContainer, .pageRangeNormal {
font-family: "Gotham";
}

s|TextBase.h1, s|RichEditableText.h1, s|ButtonBase.h1 {
font-family: "Collator";
}
s|TextBase.h2, s|RichEditableText.h2, s|ButtonBase.h2 {
font-family: "Collator";
}
s|TextBase.h3, s|RichEditableText.h3, s|ButtonBase.h3 {
font-family: "Gotham";
}
s|TextBase.h4, s|RichEditableText.h4, s|ButtonBase.h4 {
font-family: "Gotham";
}
s|TextBase.h5, s|RichEditableText.h5, s|ButtonBase.h5 {
font-family: "Gotham";
}
s|TextBase.h6, s|RichEditableText.h6, s|ButtonBase.h6 {
font-family: "Gotham";
}
s|TextBase.h7, s|RichEditableText.h7, s|ButtonBase.h7 {
font-family: "Gotham";
}
s|TextBase.h8, s|RichEditableText.h8, s|ButtonBase.h8 {
font-family: "Gotham";
}
s|TextBase.h9, s|RichEditableText.h9, s|ButtonBase.h9 {
font-family: "Gotham";
```

```
}
s|TextBase.h10, s|RichEditableText.h10, s|ButtonBase.h10 {
font-family: "Gotham";
}
s|TextBase.h11, s|RichEditableText.h11, s|ButtonBase.h11 {
font-family: "Gotham";
}
s|TextBase.h12, s|RichEditableText.h12, s|ButtonBase.h12 {
font-family: "Gotham";
}
s|TextBase.p1, s|RichEditableText.p1, s|ButtonBase.p1 {
font-family: "Gotham";
}
s|TextBase.p2, s|RichEditableText.p2, s|ButtonBase.p2 {
font-family: "Gotham";
}
s|TextBase.p3, s|RichEditableText.p3, s|ButtonBase.p3 {
font-family: "Gotham";
}
s|TextBase.p4, s|RichEditableText.p4, s|ButtonBase.p4 {
font-family: "Gotham";
}
s|TextBase.p5, s|RichEditableText.p5, s|ButtonBase.p5 {
font-family: "Gotham";
}
s|TextBase.p6, s|RichEditableText.p6, s|ButtonBase.p6 {
font-family: "Gotham";
}
s|TextBase.p7, s|RichEditableText.p7, s|ButtonBase.p7 {
font-family: "Gotham";
}
s|TextBase.p8, s|RichEditableText.p8, s|ButtonBase.p8 {
font-family: "Gotham";
}
```

Style Service Request Catalog for tablets and the desktop

The following graphics and keys show the different labels of the SRC user interface that you can customize for a tablet or desktop experience.

Customize the background, images, and icons

To modify a background image or icon, follow these steps:

1. Unzip the `image.zip` file from the Service Request Catalog .war file to some location on your computer.

2. Replace the image of your choice with your customized image using the same file name.

    > **Note:** Any images you place here override the existing out-of-box images. Each of your custom images must have exactly the same name as the out-of-box one.

3. Re-zip the `image.zip` file, and overwrite the version embedded in the Service Request Catalog .war file.

    > **Note:** Make sure there is no sub folder inside the .zip file. Otherwise, the images cannot be recognized.

Reference: Background, images and icons
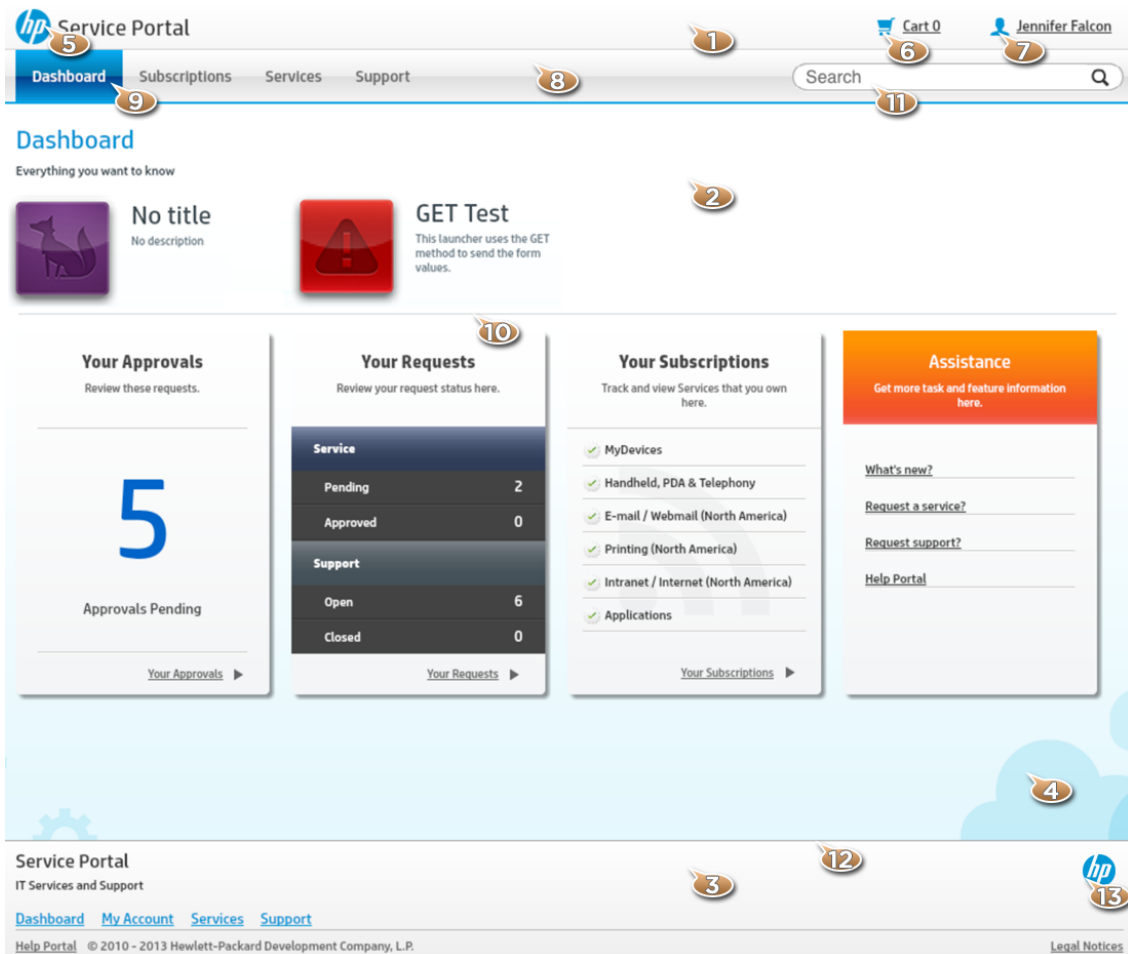
1. header.png

2. body.png

3. footer.png

4. backgroundImage.png

5. companyLogo.png

6. headerShoppingCartIcon.png

7. headerUserAccountIcon.png

8. navigationBar.png

9. navigationButtonUp.png

   navigationButtonSelected.png

10. headerSeperator.png

11. searchBoxFocusOut.png

12. footerSeperator.png

13. footerLogo.png

Customize the font styles

To modify a font style, follow these steps:

1. Locate the selector you want to customize in the `font.css` file.

2. Modify the CSS properties for color, size, style, and so on.

3. Save the `font.css` file.

Font styles

1. headerTitle

2. headerCartLink

3. headerUserDropDownLabel

4. bodyTitle

5. bodySubtitle

6. launcherTitle

7. launcherSubtitle

8. footerTitle

9. footerSubTitle

10. footerLink

11. footerHelpLink

12. footerCompanyLabel

13. footerLegalNoticeLabel

14. navigationLabelUp

    navigationLabelSelected

    navigationLabelOver (Added in Service Request Catalog 9.33 for compatibility purposes. It is used only for the desktop.)

15. backLabel

The font.css file

The content below is provided as a convenient reference for the default `font.css` file that is included with SRC.

> **Note:** This file is only used for customizing the `.zip` files method for Service Request Catalog for tablets and on the desktop.

```
/* CSS file */
/* For Example <Start>
.text {
      color: #FF0000;
      font-size: 18;
      font-weight: bold;
      font-style: italic;
      text-decoration: underline;
}
font family OOB default : HPSimplified
font family list for IOS:
      Heiti SC;
      Helvetica Neue;
font family list for Android:
      DroidSans;

<End>*/

.headerTitle {
      font-size: 21;
      color: #333333;
      font-family: HPSimplified;
}

.headerCartLink{
      font-size: 14;
```

```
        color: #333333;
        text-decoration: underline;
        font-family: HPSimplified;
}

.headerUserDropdownLabel{
        font-size: 14;
        color: #333333;
        text-decoration: underline;
        font-family: HPSimplified;
}

.launcherTitle{
        font-size: 24;
        color: #435057;
        font-family: HPSimplified;
}

.launcherSubtitle{
        font-size: 11;
        color: #71828C;
        font-family: HPSimplified;
}

.bodyTitle{
        font-size: 24;
        color: #0096d6;
        font-family: HPSimplified;
}

.bodySubtitle{
        font-size: 12;
        color: #435057;
        font-family: HPSimplified;
}

.backLabel{
        font-size: 14;
        color: #0096d6;
        font-family: HPSimplified;
}

.footerTitle{
        font-size: 18;
        color: #333333;
        font-family: HPSimplified;
}

.footerSubtitle{
```

```
        font-size: 12;
        color: #333333;
        font-family: HPSimplified;
}

.footerLink{
        font-size: 14;
        color: #0096d6;
        text-decoration: underline;
        font-family: HPSimplified;
}

.footerHelpLink{
        font-size: 12;
        color: #666666;
        text-decoration: underline;
        font-family: HPSimplified;
}

.footerCompanyLabel{
        font-size: 12;
        color: #666666;
        font-family: HPSimplified;
}

.footerLegalNoticeLabel{
        font-size: 12;
        color: #666666;
        text-decoration: underline;
        font-family: HPSimplified;
}

.navigationLabelUp{
        font-size: 15;
        color: #666666;
        font-family: HPSimplified;
}
.navigationLabelSelected{
        font-size: 15;
        color: #ffffff;
        font-family: HPSimplified;
}
.navigationLabelOver{
        font-size: 15;
        color: #000000;
        font-family: HPSimplified;
}
```

Appendix E: Fields available for advanced search

The following table lists the fields in interactions that can be used for advanced search.

Field	Type	Level	Searchable Field
affected.item	character	1	Yes
agreement.id	number	1	Yes
agreement.ids	number	2	No
agreement.ids	array	1	No
alternate.contact	character	1	Yes
alternate.extension	character	1	Yes
alternate.fax	character	1	Yes
alternate.phone	character	1	Yes
approval.status	character	1	No[1]
assignment	character	2	No
assignment	array	1	No
billto	character	1	Yes
billtype	character	1	Yes
bRequestOnBehalf	logical	1	Yes
building	character	1	Yes
callback.beeper	character	1	Yes
callback.contact	character	1	Yes
callback.contact.fullname	character	1	Yes
callback.email	character	1	Yes
callback.phone	character	1	Yes
callback.reason	character	1	Yes
callback.type	character	1	Yes
cartId	character	1	Yes
category	character	1	Yes

Field	Type	Level	Searchable Field
cause.code	character	1	Yes
class	character	1	Yes
close.time	date/time	1	Yes
closed.by	character	1	Yes
company	character	1	Yes
company.id	character	1	Yes
contact.email	character	1	Yes
contact.first	character	1	Yes
contact.fullname	character	1	Yes
contact.last	character	1	Yes
contact.location	character	1	Yes
contact.name	character	1	Yes
contact.tz	character	1	Yes
contract.consumed	logical	1	Yes
contract.id	number	1	Yes
corp.level1	character	1	Yes
corp.level2	character	1	Yes
corp.level3	character	1	Yes
corp.structure	character	1	Yes
cost.centre	character	1	Yes
country	character	1	Yes
critical.device	logical	1	Yes
critical.user	logical	1	Yes
current.pending.groups	character	2	No
current.pending.groups	array	1	No
cust.visible	logical	1	Yes
customer.reference	character	1	Yes

Field	Type	Level	Searchable Field
dept	character	1	Yes
description	character	2	No
description	array	1	No
different.from.contact	logical	1	Yes
engineer	logical	1	Yes
entitlement.ref	character	1	Yes
ess.entry	logical	1	Yes
essUpdated	logical	1	Yes
expectedResolution	date/time	1	Yes
extension	character	1	Yes
failed.entitlement	logical	1	Yes
fax	character	1	Yes
first.call	logical	1	Yes
first.touch	date/time	1	Yes
floor	character	1	Yes
folder	character	1	Yes
gl.number	character	1	Yes
handle.time	date/time	1	Yes
incident.id	character	1	Yes
incident.id.applog	character	1	Yes
incident.id.approval	character	1	Yes
incident.id.attach	character	1	Yes
incident.id.svcCat	character	1	Yes
incident.id.vj	character	1	No
incident.id.vj.alerts	character	1	No
incident.id.vj.sla	character	1	No
incident.id.vj.slo	character	1	No

Field	Type	Level	Searchable Field
initial.impact	character	1	Yes
kpf.file	character	1	Yes
kpf.id	character	1	Yes
location	character	1	Yes
location.full.name	character	1	Yes
logical.name	character	1	Yes
mandatory.asset	logical	1	Yes
model	character	1	Yes
needed.by.time	date/time	1	Yes
next.breach	date/time	1	Yes
one.click	logical	1	Yes
open	character	1	No
open.time	date/time	1	Yes
opened.by	character	1	Yes
opened.by.uid	character	1	Yes
other	character	1	Yes
owner.name	character	1	Yes
payroll.no	character	1	Yes
pending.change	logical	1	Yes
phone	character	1	Yes
priority.code	character	1	Yes
problem.id	number	1	Yes
problem.type	character	1	Yes
product.type	character	1	Yes
requesttype	character	1	No
reset.approvals	logical	1	Yes
resolution	character	2	No

Field	Type	Level	Searchable Field
resolution	array	1	No
resolution.code	character	1	Yes
room	character	1	Yes
severity	character	1	Yes
site.category	character	1	Yes
sla.breach	logical	1	Yes
lution.candidate	logical	1	Yes
source.service	character	1	Yes
subcategory	character	1	Yes
subscriptionItem	character	1	Yes
svc.cost	number	1	Yes
svc.options	character	1	Yes
sysmodcount	number	1	Yes
sysmodtime	date/time	1	Yes
sysmoduser	character	1	Yes
temp.update	character	2	No
temp.update	array	1	No
title	character	1	Yes
total.loss	logical	1	Yes
type	character	1	Yes
unassigned	logical	1	Yes
unused.field	character	2	No
unused.structure	structure	1	No
update.action	character	2	No
update.action	array	1	No
update.action.ess	character	2	No
update.action.ess	array	1	No

Field	Type	Level	Searchable Field
update.time	date/time	1	Yes
updated.by	character	1	Yes
updated.by.uid	character	1	Yes
user.type	character	1	Yes
variable1	character	1	Yes
variable2	character	1	Yes
variable3	character	1	Yes
vendor	character	1	Yes
vj.incident.id.1	character	1	No
vj.incident.id.2	character	1	No
vj.incident.id.3	character	1	No
vj.incident.id.4	character	1	No
vj.incident.id.6	character	1	No
vj.incident.id.7	character	1	No
worked.time	date/time	1	Yes

[1]This field is filtered in Service Request Catalog user interface already.

Send Documentation Feedback

If you have comments about this document, you can contact the documentation team by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on Customization Guide (Service Request Catalog 9.41)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to ovdoc-itsm@hp.com.

We appreciate your feedback!