

HP Service Manager

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For the supported Windows® and UNIX® operating systems

Calendar Administration help topics for printing

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Chapter 1: Calendar Administration

Prior to version 9.34, HP Service Manager allowed you to set up a calendar only through the Release Control integration (also referred to as the RC Calendar). As of version 9.34, Service Manager additionally provides a calendar (referred to as Service Manager Calendar) that is based on a calendar widget.

Service Manager Calendar can display time period records and associated business records in a graphic and intuitive user interface. It enables users in different locations and departments of your organization to perform the following tasks and optimize their task planning accordingly:

- To easily see how their activities will be affected in a specific time range. For example, they can see if a performance degradation or service outage will happen during the first week of May.
- To easily see which business records (changes, incidents, interactions, and so on) are scheduled for or associated with a specific time range. For example, they can see if a change is planned to start or end during the first week of May.
- To directly view important details of time period records and associated records from tooltips.
- To directly open records from the calendar to view their details.
- To view time conflicts of object records from conflict icon tooltips and shadow bars.

Service Manager Calendar also allows high-level tailoring through a set of configurations. For time period records and associated records, you can set color preferences, maximum number of records to display, field mappings, filters, and so on.

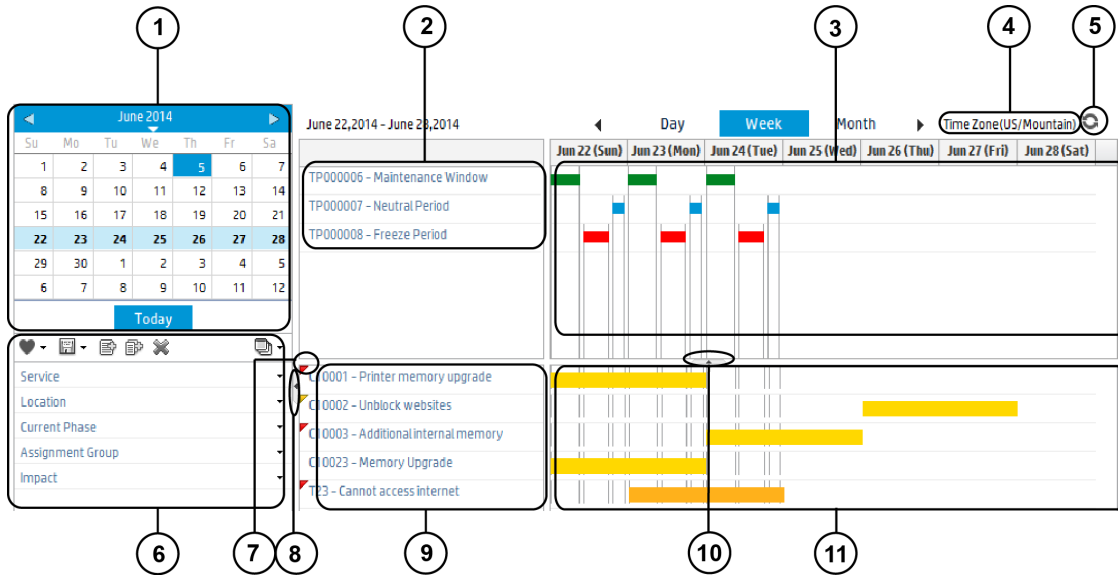
Full calendar and embedded calendar

HP Service Manager Calendar has two views: Full Calendar and Embedded Calendar.

Full calendar

This is a complete view of the calendar, accessible from **Miscellaneous > Calendar**, or from a button in the embedded calendar.

The following figure illustrates the full calendar.




The following table describes the major areas of the calendar.

Callout	Description
1	The date picker panel. You can use the arrow buttons on this panel to quickly jump to a specific year/month/date.
2	<p>The Time Period record list panel, which is the upper part of the record list area. Note that the record list area is also referred to as the "Title area" of the calendar.</p> <p>This panel lists the time period records being displayed in the current calendar view, based on the settings in the Title Configuration section in System Administration > Ongoing Maintenance > Calendar Administration > Calendar Mappings.</p>
3	<p>The Time Period graphic view panel, which is the upper part of the right-side area of the calendar ("calendar entry area"). This panel displays time period occurrences as a single-color bar, and the length of each bar represents an occurrence duration.</p> <p>Note: This panel displays only active time period occurrences.</p>
4	<p>The time zone area, which displays the time zone that is defined in the current user's operator record, or the one defined in the System Information Record if the former does not exist.</p> <p>Note: If neither exists, this area displays Time Zone (undefined).</p>
5	The Refresh button, used to fresh the calendar display.

Callout	Description
6	<p>The filter panel, used to manage filtered views of the calendar. This filtering feature helps users locate data of their interest.</p> <p>On the filter panel, users can add individual filter fields and field groups.</p>
7	<p>Conflict icons. Each of these icons indicates that the current record has conflicts with one or more time periods of the Freeze Period or Maintenance Window type, or has one or more custom messages configured, or both. These icons have tooltips that show specific conflict information and custom messages.</p> <p>A record that has conflicts is one that exceeds, or misses, or overlaps with a Freeze Period or Maintenance Window time period. When it has conflicts only with maintenance windows, a yellow icon is displayed; as long as it has conflicts with freeze periods, a red icon is displayed; if it has no conflicts but has only custom messages configured, a blue icon is displayed.</p> <p>Conflicts and overlaps are also indicated by gray background bars ("shadow bars") behind the records bars. The more time periods a record has conflicts with, the darker the shadow bar becomes.</p>
8	This button collapses the entire left-side panel (which consists of the date picker panel and the filter panel).
9	The object record list panel, which is the lower part of the record list panel ("Title area"). This panel lists object records that are associated with the current time range. For example, this panel may list a Change record whose Planned Start or Planned End time falls into the currently displayed time range. The Calendar Settings and Calendar Mappings configurations determine which records are displayed in this area.
10	This button collapses the entire time period panel.
11	The graphic view panel of object records, which is the lower part of the "calendar entry area". This panel displays relevant object records as a single-color bar to provide an intuitive view of the start and end times of these records. Administrators can use different colors to identify different records.

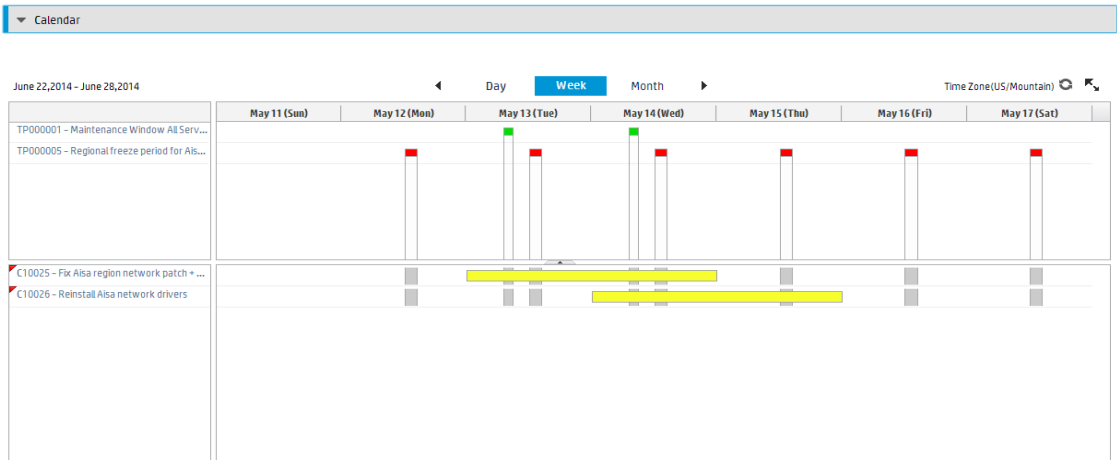
Embedded calendar

The embedded calendar is a simplified view of the calendar, accessible only from certain objects. For example, from the calendar section in a Change or a Change Task record. The embedded calendar displays information about time periods and object records in a way that is more relevant to the current record. This is implemented through [Embedded Calendar Configuration](#), which allows you to configure a filter query to display related records in the embedded calendar.

Note: The embedded calendar does not contain the date picker panel and filter panel that exist in the full calendar; however, if you want to view the same data in the full calendar, click the **Launch full calendar** button () at the top right corner. The full calendar inherits the data filter of the embedded calendar.

Caution: Calendar consumes a certain amount of system resources (memory and CPU). Therefore, if you plan to embed the calendar in forms that are heavily used in your organization’s daily operation (such as incident or interaction forms), and if your server already runs at high capacity, we recommend that you analyze and understand the impact before deployment.

The following figure shows the embedded calendar that is displayed in a Change record.



Calendar security area and role

The default Calendar Administration security area and Calendar Administrator security role are defined for HP Service Manager Calendar.

Security area

The default Service Manager Calendar uses the following security area.

Area	Description
Calendar Administration	This area contains the default security rights that will be applied to all of the roles created for the Calendar area.

To access the Calendar Administration security area, follow these steps:

1. Navigate to **System Administration > Security > Areas**.
2. In the **Name** field, select **Calendar Administration**.
3. Click **Search**.

Security rights and settings

The following table describes the security rights and settings used in Service Manager Calendar.

Setting/Right	Description
View	Can view Calendar Filter Mapping, and Calendar Mapping records as well as their related records (such as filter field, filter mapping, embedded configuration records)
New	Can add Calendar Filter Mapping, and Calendar Mapping records as well as their related records (such as filter field, filter mapping, and embedded configuration records)
Delete/Close	Can delete Calendar Filter Mapping, and Calendar Mapping records as well as their related records (such as filter field, filter mapping, and embedded configuration records)
Expert	Unused
Admin	Unused
Modify Template	Unused
Add Public Favorite	Can create public favorites
Delete Public Favorite	Can delete public favorites
Update Public Favorite	Can update public favorites

Security role

Out-of-the-box, the following security role is available for Service Manager Calendar.

Role	Description	Default Rights/Setting in the Calendar Administration Area
Calendar Administrator	Full rights	<ul style="list-style-type: none">• View• New• Update (Always)• Delete/Close (Always)• Expert• Admin• Modify Template• Add Public Favorite• Delete Public Favorite• Update Public Favorite

To access the Calendar Administrator security role, follow these steps:

1. Navigate to **System Administration > Security > Roles**.
2. In the **Name** field, select **Calendar Administrator**.
3. Click **Search**.

Chapter 2: Calendar administration tasks

Before users can use the calendar, administrators must set up the following configurations.

- ["Enable or disable the calendar" on the next page](#)

Enable or disable the HP Service Manager calendar.

- ["Configure calendar settings" on page 13](#)

Configure the settings of the calendar, such as the objects (for example, Change and Incident) that can be mapped with time periods, and the maximum number of records returned in each calendar object query or calendar time period query.

- ["Display records from an application module in the calendar" on page 16](#)

Define a mapping record for the Time Period object, and for each object mapped with it. Each mapping record defines a field mapping between the object and Time Period, and determines how the calendar displays records of the object.

- ["Display an embedded calendar on an incident form, an interaction form, or a problem form" on page 24](#)

Display an embedded calendar on an incident form, an interaction form, or a problem form.

- ["Configure search filters for the full calendar" on page 26](#)

Configure a single filter mapping record for the full calendar and the embedded calendar.

For the full calendar, specify some fields of the specified objects as filter fields so that users can create filtered views of the full calendar. For the embedded calendar, define filters for the specified objects so that the embedded calendar automatically displays different filtered views in different records.

- ["Localize a filter field" on page 31](#)

Create localized versions of the field labels if the environment needs to support multiple languages.

- ["Test your calendar" on page 32](#)

Test the calendar to see if it works properly.

Enable or disable the calendar

The **Enable Calendar and Time Period Management** check box enables or disables HP Service Manager Calendar. By default, this check box is selected, which means Service Manager Calendar is enabled. To disable Service Manager Calendar, follow these steps:

1. Click **System Administration > Base System Configuration > Miscellaneous > System Information Record**.
2. Click the **General** tab.
3. Clear the **Enable Calendar and Time Period Management** check box.
4. Click **Save**.

To use the Release Control Calendar, you need to clear this check box.

Note: If you enable the SM-RC integration when Service Manager Calendar is enabled, the system displays the following message when you click **Miscellaneous > Calendar**:

Both Service Manager Calendar and Release Control Calendar are enabled. Only one calendar can be enabled at a time. Contact your system administrator to disable one of them.

Configure calendar settings

Administrators configure the calendar settings to define the overall look and feel of HP Service Manager Calendar.

To configure the calendar settings, follow these steps:

1. Click **System Administration > Ongoing Maintenance > Calendar Administration > Settings**.
2. Edit the fields as needed.

The following table describes each field.

Field	Description	Default	Notes
Module	The name of the module to which this record belongs	Calendar	This setting is system generated and is not editable.
Area	The security area to which this record belongs	Calendar Administration	This setting is system generated and is not editable.
First Day of Week	The first day of the week	Sunday	This setting takes effect only on the calendar, not on the date-picker or the Release Control calendar.
Max Records Returned in Calendar Object	Determines the maximum number of object records that a calendar query can return.	50	Must be a positive integer.

Field	Description	Default	Notes
Query	This setting limits the number of object records (for example, Change and Incident records) that can be displayed in the calendar.		
Max Records Returned in Time Period Query	<p>Determines the maximum number of time period records that a calendar query can return.</p> <p>This setting limits the number of time period records that can be displayed in the calendar.</p>	25	Must be a positive integer.
Time Range in Day View	<p>Determines how the calendar daily view divides a day. By default, one day is divided into four sessions:</p> <ul style="list-style-type: none"> 00:00-06:00 06:00-12:00 12:00-18:00 18:00-24:00 	Every 6 hours	Select a value from the list.
Available objects for Calendar Mapping	<p>The table names of the objects that can be mapped with the Time Period object.</p> <p>The names are comma-separated.</p>	cm3r,cm3t, incidents,probsummary,rootcause	<p>You can specify any tables (objects).</p> <p>This setting takes effect for both the full calendar and the embedded calendar.</p>

Field	Description	Default	Notes
			Example Values: cm3r, probsummary, rootcause, incidents

3. Save the record.

Now, you have completed the global settings for the calendar. Next, you need to configure calendar mapping. See ["Display records from an application module in the calendar" on the next page](#).

Display records from an application module in the calendar

The purpose of calendar mapping is to ensure that certain objects of HP Service Manager (such as Incident, Changes, and Time Periods) are properly displayed in the calendar. This feature also links the Time Period object with other objects in the system. Before proceeding with this task, you, as a system administrator, should have already specified the objects that you want to map with the Time Period object. See ["Configure calendar settings" on page 13](#).

Now, you need to create a mapping record for each of these objects, including the Time Period object.

Caution: Create only one mapping record for each object; otherwise, a duplicate record error occurs.

The Calendar Mapping form is accessible from **System Administration > Ongoing Maintenance > Calendar Administration > Calendar Mappings**. By default, there are three mapping records for Time Period, Change, and Change Task, respectively.

The following table describes the sections of the calendar mapping form.

Section	Description
Header	Displays general information of the mapping record, such as the ID, associated object, active or inactive state, and description.
Restricting Query Configuration	<p>This is a default query that allows only relevant records of the selected object to be displayed in the calendar.</p> <p>The query must use this format: <code>field="value"</code>, where <code>field</code> is the name of a field in the object table, and <code>value</code> can be a static value, a RAD expression (for example, <code>affected.item in \$L.file</code>), or a JavaScript call (for example, <code>jscall("JS method");</code>); or you can enter <code>true</code> for no restrictions.</p> <p>Example value:</p> <pre>status="closed" and category="Application"</pre>
Title Configuration	<p>Specifies which fields of the object to display in the Title area (record list area) of the calendar.</p> <p>All available fields of the selected object are displayed in the Available Fields box, and the fields that are used in the Title area are displayed in the Selected Fields box.</p> <p>Note: This is a mandatory setting.</p>

Section	Description
Tooltip Configuration	<p>Specifies which fields are displayed in the tooltip when you hover your mouse over a record (or a record bar) of the selected object in the calendar.</p> <p>All available fields of the selected object are displayed in the Available Fields box, and the fields that are used in the tooltip are displayed in the Selected Fields box.</p>
Color Preferences	<p>Specifies color settings for the selected object.</p> <p>To cover different requirements, you can enter a condition for each color. The conditions are evaluated in top-to-bottom order. As soon as one condition evaluates to true, the evaluation of the color preferences is stopped.</p> <p>If you specify no color preferences, a default color is used. In the Default Color field, you can configure a default color by using HTML color codes (for example, #000000).</p>
Default Sort Preferences	<p>Specifies the default sort preferences for the Title area and calendar entry area in the calendar.</p> <p>If you specify no default sort preferences, records will be sorted by record ID in ascending order.</p>
Time Period Field Mapping	<p>This section is available only for objects other than Time Period. It creates a link between Time Period and the object. The mapping is used for conflict detection and overlapping functionality in the calendar.</p> <ul style="list-style-type: none"> Field for Start Date and Field for End Date (Mandatory): Specify which fields of the object are mapped with the Start Date and End Date of the Time Period object. The calendar displays records of the object as a record bar whose length is calculated based on the Start Date and End Date values. Time Period Mapping Query: This query defines which time period objects are used for detecting the conflict for the object. When a conflict is detected, the calendar displays a conflict icon for a record. It also displays a gray background bar ("overlap shadow bar") behind the record bar when the record either overlaps with, exceeds, or misses a freeze window or maintenance window (see "Conflict Icon Custom Messages" on the next page for more information). You can use <code>\$L.file</code> as a reference to the current record. <p>The following is a query example:</p> <pre>current.phase="published" and (affected.services=affected.item in \$L.file or affected.services="all") and (location=location.full.name in \$L.file or location="all")</pre> <ul style="list-style-type: none"> Query for Time Period Conflict Calculation: You can enter a query against the selected object to restrict the records for conflict calculation with Time Period. <p>The following is a query example :</p> <pre>category in \$L.file ~={"CI Group","Default","KM</pre>

Section	Description
	Document", "Unplanned Change", "Subscription"} and open in \$L.file=true
Conflict Icon Custom Messages	<p>A conflict icon refers to a small red or yellow triangle icon that is displayed at the top left corner of an object record cell (see "Full calendar and embedded calendar" on page 5). The red triangle indicates the current record overlaps with one or more time periods of the Freeze Period type, while the yellow triangle indicates the record either exceeds or misses one or more time periods of the Maintenance Window type. When both types of conflicts occur, only the red triangle is displayed. The icon tooltip displays specific conflict information of the record.</p> <p>You can configure additional custom messages to be displayed as part of the tooltip of a conflict icon. For example, you can specify the following configuration so that the "This is an emergency change" message is displayed in the conflict icon tooltip for each Emergency Change record.</p> <ul style="list-style-type: none"> • Condition: emergency in \$L.file=true • Message: scmsg(1, "timeperiodCalendarMapping") <p>Note: If a record has no conflicts with any time periods but has one or more custom messages configured, a blue triangle is displayed instead of the red or yellow one.</p>

Example: Display Time Period, Change, and Incident in the calendar

This example configuration assumes that you have specified the `cm3r` (Change) and `probsummary` (Incident) objects for calendar mapping in the calendar global settings. Now you need to configure a mapping record for each of the objects: Time Period, Change, and Incident.

By default, there are two mapping records for Time Period and Change, respectively. You may want to edit the existing mapping records to better suit your needs, and add one new mapping record for Incident.

To display Time Period, Change, and Incident in the calendar, follow these steps:

1. Click **System Administration > Ongoing Maintenance > Calendar Administration > Calendar Mappings**.
2. Click **Search**.

A list of existing mapping records is displayed. Out-of-the-box, only the mapping records for Time Period, Change and Change task are displayed.

3. Edit the CALMAP01 (for Time Period), the CALMAP02 (for Change), and the CALMAP03 (for Change Task) records as needed.

- a. In the **Header** section, edit the optional Description field and make sure the **Active** option is selected.

Only active objects can be displayed in the calendar. Canceling this option will disallow records of the object to appear in the calendar.

- b. In the **Restricting Query Configuration** section, enter a query. See the following table for examples.

Object	Restricting Query Configuration	Note
Time Period	true	This query filters the records to be retrieved from the timeperiodDefinition table.
Change	true	This query filters the records to be retrieved from the cm3r table.
Change Task	true	This query filters the records to be retrieved from the cm3t table.

- c. In the **Title Configuration** section, enter a field separator or leave the field empty to use the default (a hyphen), and move the fields that you want to display in the Title area to the Selected Fields box. See the following table for examples.

Object	Selected Fields
Time Period	ID Name
Change	Change ID Title
Change Task	Incident ID Title

- d. In the **Tooltip Configuration** section, move the fields that you want to display in the object's tooltip (hover-over text) to the Selected Fields box, and use the up/down arrow button to change the sort order of the fields. See the following table for examples.

Object	Selected Fields
Time Period	ID Type Category Scope Name Owner Group Services
Change	Change ID Title Description Service
Change Task	Status Priority Affected Services

- e. In the **Color Preferences** section, click **Add** to add color preferences. See the following table for examples, where you specify three colors for three types of time periods, and one color for all change records.

Object	Color	Name	Condition
Time Period	#FF0000	Freeze Period (Red)	(type in CurrentRecord = "nogo")
Time Period	#018424	Maintenance Window (Green)	(type in CurrentRecord = "go")
Time Period	#0197D6	Neutral Period (Blue)	(type in CurrentRecord = "neutral")
Change	#FFD800	Hardware (Yellow)	(assign.dept in CurrentRecord = "Hardware")
Change Task	#FFB11B	Hardware (Yellow)	(assign.dept in CurrentRecord = "Hardware")

- f. In the **Default Sort Preferences** section, select the fields by which you want to sort records of

the object, and select **Ascending** or **Descending** order. See the following table for example.

Object	Sort Field	Sort Type
Time Period	ID	Ascending
Change	Change ID	Ascending
Change Task	Task ID	Ascending

- g. In the **Time Period Field Mapping** section, select the fields to map with the Start Date and End Date in the calendar, and specify a mapping query as necessary.

Note: The Time Period Field Mapping section is not available for Time Period objects.

See the following table for an example.

Object	Field for Start Date	Field for End Date	Time Period Mapping Query	Query for Time Period Conflict Calculation
Change	Planned Start	Planned End	current.phase="published" and (affected.services=affected.item in \$L.file or affected.services="all") and (location=location.full.name in \$L.file or location="all")	category in \$L.file ~="{CI Group", "Default", "KM Document", "Unplanned Change", "Subscription"} and open in \$L.file=true

- h. Configure conflict icon custom messages for the Change mapping record. See the following table for examples.

Condition	Message
emergency in \$L.file=true	scmsg(1,"timeperiodCalendarMapping")
foreign.id in \$L.file~=NULL	scmsg(2,"timeperiodCalendarMapping") + foreign.id in \$L.file

- i. Save the mapping records.

4. follow these steps to add a mapping record for Incident.

- a. Click **System Administration > Ongoing Maintenance > Calendar Administration > Calendar Mappings**.
- b. In the **Object** field, select **Incident**.
- c. In the **Description** field, enter a description of the mapping (optional).
- d. Click **New**, and then click **Save**.

The record is added and automatically assigned with an ID.

- e. Select the **Active** check box.

Note: By default, each mapping record is created as Inactive. Only active mappings take effect. Once a mapping is created, you can update it but can no longer delete it. If a mapping is no longer needed, disable it by clearing the **Active** check box.

- f. In the **Restricting Query Configuration** section, enter a query. For example, use the default value: `true`.
- g. In the **Title Configuration** section, enter a field separator or leave the field empty to use the default (a hyphen) , and move the fields that you want to display in the Title area to the Selected Fields box. See the following table for an example.

Object	Selected Fields
Incident	Incident ID Title

- h. In the **Tooltip Configuration** section, move the fields that you want to display in the object's tooltip (hover-over text) to the Selected Fields box, and use the up/down arrow to change the sort order of the fields. See the following table for an example.

Object	Selected Fields
Incident	Status Priority Affected Services

- i. In the **Color Preferences** section, configure a default color for the Incident object, and if needed add more color preferences.

To configure a default color, in the Default Color field, enter an HTML color code (for example, FF8000).

To add more color preferences, click **Add**, select a color from the color palette, enter a name for the selected color, if needed click **Edit** to enter a condition (RAD Expression) using the Condition Editor, and then click **OK**.

See the following table for an example, where you specify one color for incident records that are in Closed status, which implies that incident records in any other status will display in the default color.

Object	Color	Name	Condition
Incident	#01DF01	Closed Incidents (Green)	(Expression: problem.status in \$L.file = "Closed")

- j. In the **Default Sort Preferences** section, select the fields by which you want to sort records of the object, and select the **Ascending** or **Descending** order. See the following table for an example.

Object	Sort field	Sort type
Incident	Incident ID	Ascending

- k. In the **Time Period Field Mapping** section, select the fields to map with the Start Date and End Date of the Time Period object, and if needed specify a mapping query for conflict detection. See the following table for an example.

Object	Field for Start Date	Field for End Date	Time Period Mapping Query
Incident	Outage Start	Outage End	true

- l. In the **Conflict Icon Custom Messages** section, configure messages and their conditions for conflict icon tooltip display.
 - m. Save the mapping record.
5. Similarly, add a mapping record for other objects (Problem, Interaction, and so on) as necessary.

Display an embedded calendar on an incident form, an interaction form, or a problem form

Caution: Calendar consumes a certain amount of system resources (memory and CPU). Therefore, if you plan to embed the calendar in forms that are heavily used in your organization's daily operation (such as incident or interaction forms), and if your server already runs at high capacity, we recommend that you analyze and understand the impact before deployment.

The default embedded calendar is accessible from the calendar section in a Change or a Change Task record only. To display an embedded calendar on an incident form, an interaction form, or a problem form, follow these steps:

1. Click **System Administration > Ongoing Maintenance > Calendar Administration > Calendar Filter Mappings** to open the **Calendar Filter Mapping** form.
2. Go to the **Embedded Calendar Configuration** section, and add predefined filters for the embedded calendar. You may want to add one or more filters for each object. The default embedded calendar is available only for the Change object and the Change task object.
 - a. Click **Add Configuration**.
 - b. Complete the fields and select the options as described in the following table.

Field/Option	Description
Active	Indicates if the configuration is active. Only active configurations take effect. By default, this option is selected when a new configuration is added. Caution: If one or more configuration records of the same module is active, the embedded calendar is visible in the current record. Otherwise, it will be invisible in the current record.
Object	Select an object to filter against. Example: Change
Default View	Select one value from the list: Day , Week , or Month . This field determines the default display view of the embedded calendar. If

Field/Option	Description
	you leave it empty, the embedded calendar is displayed in the Week view.
Field for Initial Date	<p>Select a date/time field from the list.</p> <p>Initially, the embedded calendar displays data based on the day or week of this field's value in the current record. For example, if you select Planned Start for the Change module, when users view the embedded calendar from a Change record whose Planned Start date is 22 May 2013, the embedded calendar will initially display data for the day or week of 22 May 2013 (the Default View value determines whether a daily or weekly view is initially displayed).</p> <p>This issue also occurs when users view the embedded calendar from another record, such as an Incident record.</p> <p>Note: If you leave the Field for Initial Date field empty or if the specified field of the current record has an empty value, the embedded calendar uses the user's current date.</p>
Filter Query	<p>Type a query that filters Time Period records and records of the selected objects in the Calendar Entries field. Pay attention to the following:</p> <ul style="list-style-type: none"> • The query field should be one of the filter fields defined in the Filter Fields Configuration. • Use "=" as the operator between the field and the value, and do not miss the space before and after the "=" operator. • You can use <code>\$L.file</code> in the value as a reference to the current record. • The query supports "or" inside a field group and "and" between groups and single fields. Use lower case for the "and" and "or" operators. • If you are using an RAD expression, you must insert a space or a semicolon (;) at the end of the expression. <p>Tip: Click the Analyze button to see the logical structure of the query. This helps you make sure the query is exactly what you want. The analysis result is displayed in the Analysis Result box.</p> <p>Example:</p> <pre>assign.group = assignment in \$L.file and (service =</pre>

Field/Option	Description
	affected.item in \$L.file or service = "all") and (location = location.full.name in \$L.file or location = "all")
Condition	<p>The condition under which the filter query is executed.</p> <p>Example:</p> <p>Always (default)</p>
Calendar Entries	<p>Select the objects that you want to display in the embedded calendar.</p> <p>Only objects that have an active Calendar Mapping record defined (in System Administration > Ongoing Maintenance > Calendar Administration > Calendar Filter Mappings) are displayed and available for your selection.</p>

- c. Click **Save**.

Tip: Immediately after you add a filter field and click **Save**, an **Add** button appears in the field form, allowing you to quickly add another new field.

- d. Add more filters as needed.

The records you added appear in the list.

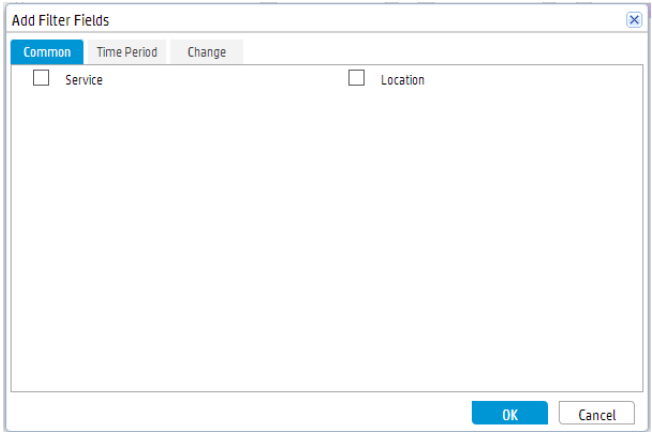
Tip: To delete an existing filter record from the list, click the record to open it, and then click **Delete**.

3. Save the calendar filter mapping.

Configure search filters for the full calendar

The Calendar Filter Mapping feature enables users to manage filtered views of HP Service Manager Calendar, so that Service Manager Calendar displays only information of their interest.

Before users can do so, you, as an administrator, should configure filter mapping through the Calendar Filter Mapping form. This form is accessible from **System Administration > Ongoing Maintenance > Calendar Administration > Calendar Filter Mappings**. The following table describes the sections of this form.

Section	Description
Header	This section includes a description and data modification information of the filter mapping record.
Filter Fields Configuration	<p>This section specifies the fields for the filter form in the calendar, and maps the fields in the filter form to a real field in the database.</p> <p>The specified fields appear on different tabs of the Add Filter Fields window, which is accessible from the filter area of the calendar. The following figure is an example of the Add Filter Fields window.</p>  <p>Each tab is called a "panel," which represents an object. Fields that appear on the Common panel are those configured for all available objects.</p>
Embedded Calendar Configuration	<p>This section specifies the filters for displaying the correct records in the embedded calendar when the calendar is displayed initially.</p> <p>The predefined filters are executed as soon as you launch the embedded calendar. With this filter setting, you can configure a query to display other related records in the calendar.</p>

Example: Configure search filters for the full calendar

Before proceeding with this configuration task, make sure that you have already completed the following tasks:

- ["Configure calendar settings" on page 13](#)
- ["Display records from an application module in the calendar" on page 16](#)

This example assumes that you have already configured a calendar mapping record for Time Period and Change. In this example, you will define filter fields and field mappings for each object so as to filter which related records are displayed on the full calendar.

1. Click **System Administration > Ongoing Maintenance > Calendar Administration > Calendar Filter Mappings** to open the **Calendar Filter Mapping** form.
2. In the **Header** section, type a description in the **Description** field (optional).
3. In the **Filter Fields Configuration** section, add filter fields and field mappings.
 - a. Click **Add Filter Fields** to open the **Calendar Filter Field** form. By default, the **Active** option is selected.

Note: Only active filter fields are used for filtering.

- b. Complete the fields on this form.

Field	Description
Field ID	Type a unique identification name for the field. This internal ID is used for filter mapping in the next step. Example: Change ID.
Label	Type a display name for the field ID. This field is mandatory. Example: Change ID.
Panel	Select a panel from the list. This is the name of a tab of the Add Filter Fields window, which is displayed when you click the Add Filter Fields button. The list includes the following panels: <ul style="list-style-type: none"> • Time Period • Common • Objects specified in the Available Objects for Calendar Mapping field (Calendar Administration > Calendar Settings). Example: Change.
Sequence	This is the order in which the field is displayed in the Add Filter Fields window. Example: 1.

Field	Description
Field Type	<p>Select a field type to define the layout of the values of the field on the filter form. The following types are supported:</p> <ul style="list-style-type: none"> • Text: Allows you to enter a text string as a value for the field. • Box Selector: Allows you to select a value for the field using a list of check boxes. <div style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p>Note: We recommend that you use this type for a field that has no more than 10 values. Displaying a large number of values in a Box Selector may cause usability issues.</p> </div> <ul style="list-style-type: none"> • Advanced Selector: Allows you to select one or more values for the field from a list of available values. • Date Time: Allows you to specify a date/time or date/time range value for the field. <p>Example: Advanced Selector.</p>
Data Source Type	<p>This field is available only when the Field Type is Box Selector or Advanced Selector. The following types are supported:</p> <ul style="list-style-type: none"> • Global List • RAD Expression • Query
Data Source Value	<p>This field is available only when the Data Source Type is Global List or RAD Expression.</p> <ul style="list-style-type: none"> • Global List: Specifies the global list to store the value list and display list. • RAD Expression: Specifies a RAD expression that returns a JSON object that contains the value list and display list. The format of the returned JSON object is as follows: <pre>{ "values": ["value1", "value2"], "labels": ["display1", "display2"] }</pre> <p>Below is an example RAD expression:</p> <pre>jscall ("CalendarFieldValueJSCall.getMyAssignmentGroupOperators")</pre>

Field	Description
Query Configuration	<p>These settings are available only when the Data Source Type is Query. It specifies a query against the data in a field of a table, which retrieves a value list and display list for the field.</p> <ul style="list-style-type: none"> File: the name of the table to be queried. For example, <code>device</code>. List Field: the name of the field that stores the value list. For example, <code>logical.name</code>. Display Field: the name of the field that stores the display list. If it is specified, the calendar displays the values of this field for users to select from. For example, <code>id</code>. <p>If it is not specified, the calendar uses the List Field instead.</p> <ul style="list-style-type: none"> Limiting SQL: a condition of the query. For example, <code>type="bizservice"</code>. Sort By: the name of the sort-by field of the query results. If it is not specified, the List Field is used.
Multiple Select	<p>This option is available only when the Data Source Type is Box Selector.</p> <p>Select this option if the filter field supports the selection of multiple values.</p>
Extended Values	<p>An additional user-defined list of values and their display labels. The labels are displayed at the top of the list of values to select for the filter field.</p>
Extended Labels	<p>For example, you can define the following extended value and label for the Time Period module so that each user can choose to display only time period records valid for the user's own department.</p> <ul style="list-style-type: none"> Extended Value: <code>\$lo.dept</code> Extended Label: My department

- c. Click **Save**. An ID is automatically assigned to the filter field.
- d. Click **Add Field Mapping** to open the **Calendar Field Mapping** form.
- e. Select a module and a mapping field, and click **Save** to add the calendar filter field mapping. By default, the **Active** option is selected.
- f. If needed, continue to follow *step d* and *step e* to map this field to multiple modules.
- g. Click **Save & Exit**.

4. If needed, continue to follow *step 1* to *step 3* to add multiple fields to the filter form.

Tip: If you want to specify a filter field for multiple modules (for example, a filter field for `affected.item` in Change and `affected.services` in Time Period), you can specify the field for the Common panel, and then add mappings for each relevant module.

5. Save the calendar filter mapping.

Now, you have completed your calendar configurations. Next, you can test your calendar. See ["Test your calendar" on the next page](#).

Localize a filter field

Once you have added a filter field in the Calendar Filter Field form, you may need to create localized versions of the field labels if your environment needs to support multiple languages.

To create a localized version of a filter field, follow these steps:

1. Identify the message ID of the filter field.
 - a. Click **System Administration > Ongoing Maintenance > Calendar Administration > Calendar Filter Mappings**.
 - b. Click the field ID in the **Filter Fields Configuration** section to open the field detail form.
 - c. Click **Localize**.
 - d. Make a note of the message ID, and then click **Cancel**.
2. Make sure the target language you need is activated.
 - a. In Database Manager, type `language` in the **Table** field, and then double-click **language** to open the **Language Identification** form.
 - b. In the **Language** field, type the language name. For example, `Japanese`.
 - c. Select **Active for login** option.
 - d. Click **Save** and **OK**.
3. In Database Manager, type `scmessage` in the **Table** field, and click **Search**.

4. Click **message.edit**.
5. Add a record for the language.
 - a. Type the required field values. See the following table.

Field	Value
Language Code	The language code of the target language. For example, jp.
ID	The original En message ID you recorded in step 1.
Class	Always type <code>local:calendarFilterEditForm</code>
Text	Type the field label in the target language.

- b. Click **Add**.
6. Go back to the filter field detail form, and click **Localize**.

The localized version is now displayed in the list.

7. Restart the HP Service Manager web application server or the Windows client for the changes to take effect.

Test your calendar

Once you have completed your HP Service Manager Calendar setup, test your calendar to see if it works properly.

Prepare data

Prepare data so that you can see records of your configured objects in the calendar and test them.

1. Create time period records for testing.

Tip: You may want to create time periods with a daily recurrence type so that you can easily verify your test results.

2. Create new records or update existing records for objects that you have configured for calendar mapping.

Test the full calendar

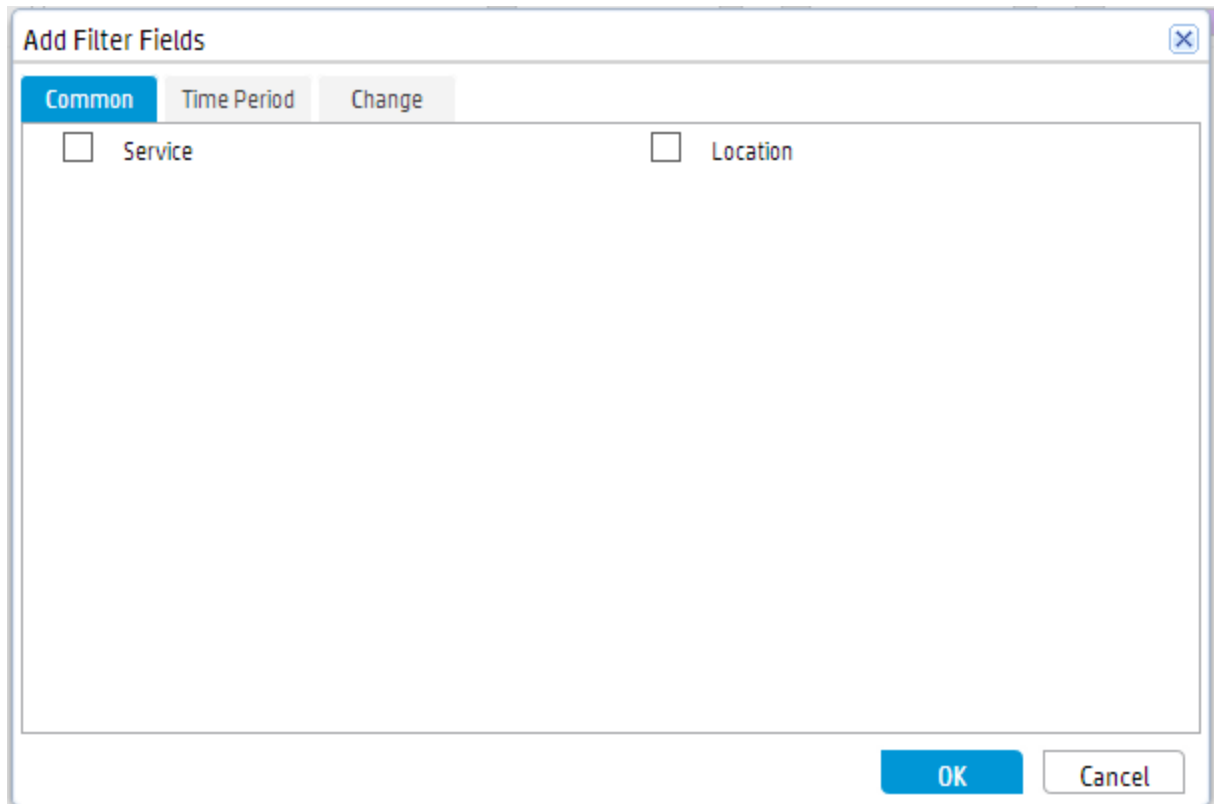
To test the full calendar, follow these steps:

1. Click **Miscellaneous > Calendar**.
2. Switch the calendar to a desired day, week, or month view, where you expect to see some Time Period, Incident, and Change records you previously created.
3. Go to the left-side filter area, click the **Choose Objects** button, and check that all objects you configured are displayed and selected in the list.

Tip: If an object is missing from the list, clear your browser cache and try again.

4. Select all or some objects, and check that the calendar automatically refreshes to display the records as expected, based on their Restricting Query Configuration, Title Configuration, Tooltip Configuration, and Color Preferences settings.
5. Click the **Add Filter Fields** button, and in the pop-up window, check that the filter fields and panels

are displayed as expected.



Test the embedded calendar

Note: Out-of-the-box, the embedded calendar is available only for Change and Change Task.

To test the embedded calendar, follow these steps:


1. Open a record.
2. Expand the **Calendar** section.
3. Check that the embedded calendar displays the correct information (based on your Embedded Calendar Configuration for the corresponding module).

Chapter 3: Working with the calendar

Once your system administrator has set up the calendar, you can perform the following tasks. For an overview of the calendar and its components, see ["Calendar Administration" on page 5](#).

- ["Launch the calendar" on the next page](#)
- ["Understand the calendar data" on the next page](#)
- ["Switch to a desired time slot" on page 38](#)
- ["Select a year, month, or date from the date picker \(full calendar only\)" on page 39](#)
- ["Collapse and expand panels \(full calendar only\)" on page 39](#)
- ["View tooltip information" on page 40](#)
- ["View time conflicts and custom messages" on page 40](#)
- ["Access a record from the calendar" on page 41](#)
- ["Drill down to the Day view" on page 41](#)
- ["Select the objects \(full calendar only\)" on page 41](#)
- ["Create a filter \(full calendar only\)" on page 42](#)
- ["Clear the current filter" on page 45](#)
- ["Manage favorites \(full calendar only\)" on page 45](#)

Note: Some tasks are allowed only in the full calendar or the embedded calendar, while some are allowed in both. Unless otherwise noted in the task heading, a task is allowed in both.

Tip: Before you work with the calendar, click the **Refresh** button () at the upper right corner of the calendar, to get the up-to-date data.

Launch the calendar


Full calendar

To launch the full calendar, click **Miscellaneous > Calendar**.

Embedded calendar

To launch the embedded calendar, follow these steps:

1. Open a change record or a change task record.
2. Expand the **Calendar** section.

Tip: To view the same calendar data in the full calendar, click the **Launch full calendar** button () on the upper right corner of the embedded calendar. The full calendar displays the same data from the embedded calendar (because it inherits the data filter from the embedded calendar).

Understand the calendar data

Full calendar

When initially opened, the full calendar displays information about published time periods and object records (such as Change records) for the current week.

Embedded calendar

Initially, the embedded calendar displays data according to the **Field for Initial Date** value in the current record. For example, if your administrator has configured the **Planned Start** field as the **Field for Initial Date** for the Change object (see ["Configure search filters for the full calendar" on page 26](#)), when you view the embedded calendar from a Change record whose Planned Start date is 22 May 2013, the embedded calendar will initially display data for the Day, Week, or Month of 22 May 2013 (the Default View value determines whether a Day, Week or Month view is initially displayed).

What record data to display in the embedded calendar is determined by the Embedded Calendar Configuration (**Calendar Administration > Calendar Filter Mappings**). See the following figure for an example. The example filter query indicates that the embedded calendar will display only records whose mapping fields for service and location either have the same value as the current Change record's affected.item field and location.full.name field respectively or have the "all" value.

Embedded Calendar Configuration

ID	<input type="text" value="002"/>	Last Modified By	<input type="text" value="falcon"/>
Active	<input checked="" type="checkbox"/>	Last Modification Time	<input type="text" value="05/08/14 21:17:05"/>
Object	<input type="text" value="Change"/>	Calendar Entries	<input checked="" type="checkbox"/> Change
Default View	<input type="text" value="Week"/>		<input checked="" type="checkbox"/> Change Task
Field for Initial Date	<input type="text" value="Planned Start"/>		



Filter Query	<input \$l.file="" (location="location.full.name")"="" all")="" and="" in="" location="all" or="" type="text" value="(service = affected.item in \$L.file or service = "/>	<input type="button" value="Analyze"/>
Condition	<input type="text" value="Always"/>	

The embedded calendar displays data only for Time Period and for objects that are selected as **Calendar Entries** (see the figure above). The way an object's records display depends on the whether an active field mapping of each Filter Query field has been defined for the object.

- If there is an active mapping for each Filter Query field defined for the object, records of this object are displayed in the current record only when they match the Filter Query;
- If there is not an active mapping record, the current record will not display the embedded calendar widget.

To see if the query fields are mapped to an object, navigate to **Calendar Administration > Calendar Filter Mapping**, and then open the filter query field in the Filter Fields Configuration section. The following figure shows an active field mapping of query field service for the Time Period object.

Calendar Filter Field Mapping

ID	<input type="text" value="0003"/>
Active	<input checked="" type="checkbox"/>
Field ID	<input type="text" value="service"/>
Module	<input type="text" value="Time Period"/> 
Mapping Field	<input type="text" value="Affected Services"/> 

Switch to a desired time slot

You can display the calendar in one of these time range views: **Day**, **Week**, and **Month**.

Tip: In the full calendar, in addition to the steps below, you can directly select a year, month, and date in the Date Picker panel. See ["Select a year, month, or date from the date picker \(full calendar only\)" on the next page](#).

To switch the calendar to a desired time slot, follow these steps:

1. Click **Day**, **Week**, or **Month** to select a time range view as needed.


The full calendar is displayed in the Week view by default, while the embedded calendar is initially displayed in the Default View defined in the Embedded Calendar Configuration. The full calendar displays a view based on today's date, while the embedded calendar displays data based on the Field for Initial Date value of the current record. See [Embedded Calendar Configuration](#).

2. Click the left or right arrow button next to the **Day** and **Month** buttons respectively to switch to the desired time slot.

Select a year, month, or date from the date picker (full calendar only)

The calendar provides a Date Picker panel at the upper left corner, which allows you to quickly select a year, month, and date.

To select a year, month, or date from the date picker, follow these steps:

1. On the Date Picker panel, click the down arrow to the right of the currently displayed month and year (for example, ).

The Date Picker panel switches to a month and year selection window, where the current month and year are selected by default.


2. Select a month and year, and then click **OK**.
3. Select a date.

The calendar automatically switches to the selected year, month, or date.


Collapse and expand panels (full calendar only)

By default, the calendar is displayed with all panels expanded. You can collapse the following panels to provide more space to display other parts of the calendar:

- The time period panel, which consists of the time period list area and graphic view area

To collapse it, click the  button.

- The left-side panel, which consists of the date picker panel and the filter panel

To collapse it, click the  button.

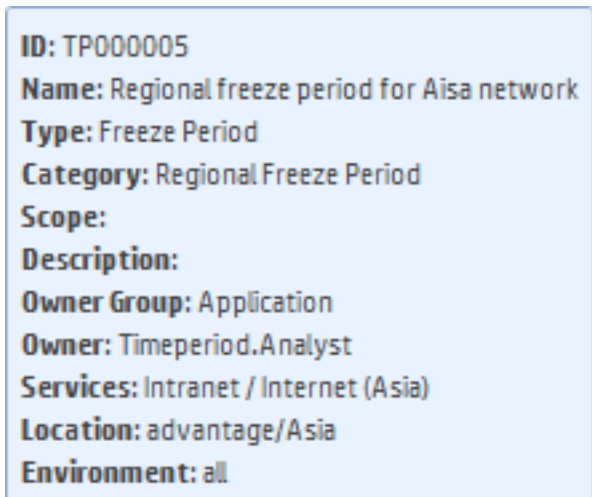
Once a panel is collapsed, an expand button displays instead to allow you to expand it again.

For the locations of the two collapse buttons, see ["Full calendar and embedded calendar" on page 5](#).

View tooltip information

To view the tooltip information of a record (time period, change, and so on), hover your mouse over the record in the record list area or over the record bar in the graphic view area.

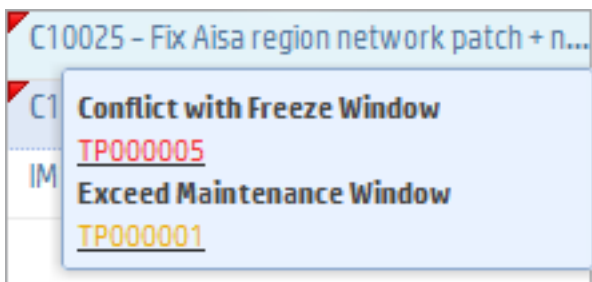
The following screen shot illustrates the tooltip information of a time period record.



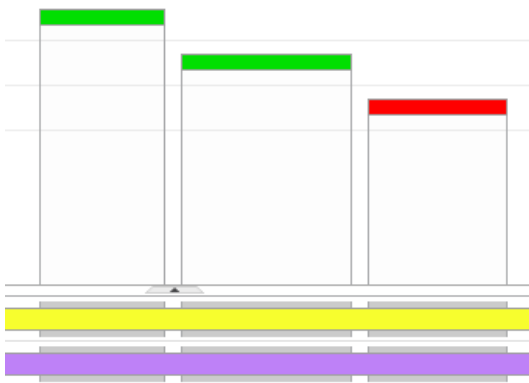
View time conflicts and custom messages

When the calendar detects that an object record has time conflicts with a time period record of the Freeze Period or Maintenance Window type, a red or yellow conflict icon is displayed for the record; if an object record has no conflicts but has one or more custom messages configured, a blue icon is displayed instead.

To view time conflict information for a record, hover your mouse over the conflict icon of the record. Custom messages, if any, are also displayed at the bottom of the tooltip.



You can also view the conflicts indicated by gray shadow bars, directly from the record bar area.



For more information, see ["Full calendar and embedded calendar" on page 5](#) and ["Display records from an application module in the calendar" on page 16](#).

Access a record from the calendar

You can access a record (for example, a time period or change record) from the calendar, to view its details or update it.

1. In the calendar, click the record from the record list area or from the graphic view area.
2. View or update the record as needed.


Drill down to the Day view

You can drill down to the Day view of a specific day from a Week or Month view.

- In the Week view, click the name of the day on the header.
- In the Month view, click the number of the day.

Select the objects (full calendar only)

By default, the calendar displays data for all available objects. You can select to display only objects of your interest.

1. On the upper right corner of the filter panel, click the **Select Objects** button ().
2. Select the objects you want.

The calendar is refreshed and displays only the data of the selected objects.

Create a filter (full calendar only)

To view specific data only, you can create a filter by adding individual filter fields, or filter field groups, or both.

Note: When filtering data, the calendar performs a logical AND operation on all individual filter fields and field groups, while performs a logical OR operation on all fields within each group.

To create a filter, follow these steps:

1. Add individual filter fields as needed.
 - a. Click **Miscellaneous > Calendar** to launch the calendar.
 - b. Click the **Add Filter Fields** button.
 - c. Click each tab, and select the fields you want.
 - d. Click **OK**. The selected fields are displayed in the filter panel.
2. Add field groups as needed.
 - a. Click the **Add Field Group** button, select the fields that you want to add to a group, and then click **OK**. The fields are added to the filter panel as a group.

Alternatively, if you want to add an existing individual filter field to a group, click the down arrow button of the field, and select **In Group**. The field is added to the filter panel as a group.

Note: Each group is identified by - **[Group]**, under which the group fields are nested. Clicking the minus icon will collapse the group.

- b. If you still want to add more fields to the group, click the down arrow button of the group, select **Add Fields**, and then select more fields.

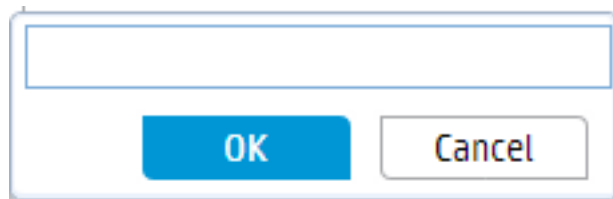
Note: To delete a field from the group, click the down arrow button of the field, and then click **Delete**.

Note: To delete a group, click the down arrow button of the group, and select **Delete Group**.

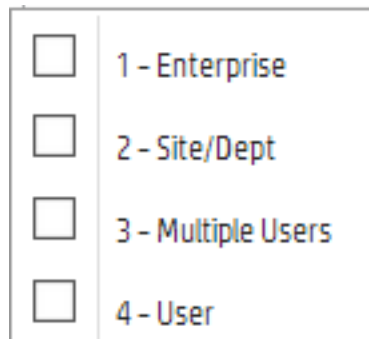
3. Repeat the steps above to add more fields or groups as needed.
4. Specify one or more values as needed for each individual filter field and group field.
 - a. Click a field.

A value selection window opens, which can be a text input box, a Box Selector, an Advanced Selector, or a Date Picker, depending on the Field Type your administrator configured when adding the filter field.

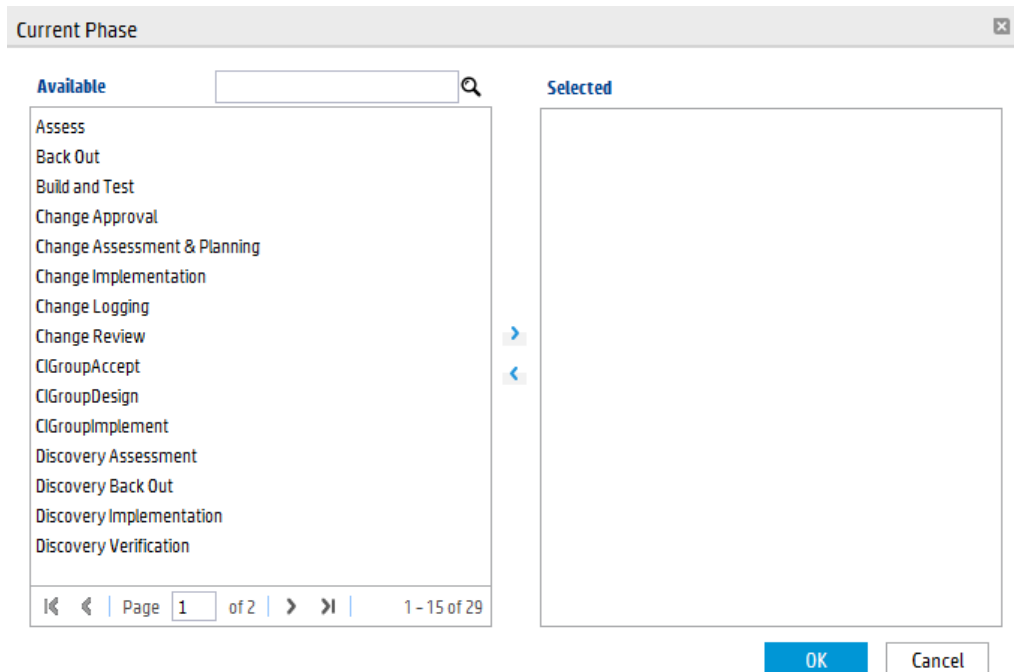
Text input box:

A dialog box with a text input field at the top and two buttons at the bottom: a blue 'OK' button and a 'Cancel' button.

Box Selector:

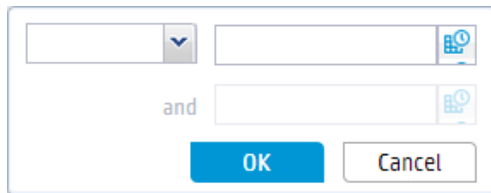
A dialog box containing a list of four items, each with an unchecked checkbox and a label: '1 - Enterprise', '2 - Site/Dept', '3 - Multiple Users', and '4 - User'.

Advanced Selector:



The Advanced Selector dialog box is titled "Current Phase" and features a search bar at the top. It is divided into two main sections: "Available" on the left and "Selected" on the right. The "Available" section contains a list of 15 items: Assess, Back Out, Build and Test, Change Approval, Change Assessment & Planning, Change Implementation, Change Logging, Change Review, CIGroupAccept, CIGroupDesign, CIGroupImplement, Discovery Assessment, Discovery Back Out, Discovery Implementation, and Discovery Verification. Below this list is a pagination control showing "Page 1 of 2" and "1 - 15 of 29". The "Selected" section is currently empty. Between the two sections are two arrow buttons for moving items. At the bottom right, there are "OK" and "Cancel" buttons.

Date Picker (where you can specify a date range):



The Date Picker dialog box allows users to select a date range. It features two date input fields, each with a calendar icon to its right. The word "and" is positioned between the two fields. Below the fields are "OK" and "Cancel" buttons.

- b. Enter a text value (for text type only), or select one or multiple values for the field.
- c. Repeat the steps above for the rest of the fields.

The filter is created, and the calendar automatically refreshes based on the filter.

You can further save the current filtered view as a private or public favorite for later reuse. For details, see ["Manage favorites \(full calendar only\)" on the next page](#).

Clear the current filter

To clear the current filter, click the **Clear Filter** button and then click **Yes** to confirm the deletion. All filter fields and groups are removed from the filter panel.

Manage favorites (full calendar only)

Once you have created a filter, you can save the filtered data view as a favorite for reuse. The Manage Favorites feature enables you to add, update, delete, and open favorites.

Note: To add, delete, or update a public favorite, you need the following security rights respectively, which are defined in the Calendar Administration security area (see "[Calendar security area and role](#)" on page 8):

- Add Public Favorite
- Delete Public Favorite
- Update Public Favorite

To add a favorite, follow these steps:

1. Open the calendar, and create a filter. For details, see "[Create a filter \(full calendar only\)](#)" on page 42.
2. Click **Manage Favorites > Add**.
3. Enter a name and description for the favorite, and select **Public** to make it public or leave **Public** unselected to make it private.

Note: A public favorite is accessible to all calendar users, while a private one is accessible only to the user who created it.

4. Click **Save**.

To update a favorite, follow these steps:

1. Click **Select Favorite**, and then select a favorite from the list.

Alternatively, click **Manage Favorites > Organize**, click the **Refresh** button, select a favorite, and then click the **Open** button.

The calendar switches to the data view of the favorite.

2. On the filter panel, update the filter as needed. For example, add or delete filter fields/groups or update filter field values. For details, see "[Create a filter \(full calendar only\)](#)" on page 42.
3. Click **Manager Favorites > Update**.
4. Optionally, update the name, description, and privacy setting.
5. Click **Save**. The favorite is updated.

To delete a favorite, follow these steps:

1. Click **Manage Favorites > Organize**.
2. Click **Refresh** to refresh the favorite list.

A refresh is needed in case other users create or update public filters while you are working with the calendar.

3. Select a favorite, and click the **Delete** button.
4. Click **Yes** to confirm the deletion. The favorite is deleted.

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 Calendar Administration help topics for printing (Service Manager 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!

