

1. Overview

Xapity Clone tool clones major Work Items

- Incident, Problem, Change Request, Release Record and Service Request.

It will support most customisations and all activities that are attached to parent work items.

2. Installation

Import Management Pack(s)

Import the following:

- Xapity.Clone.mpb
- Optional: XapityCloneLanguage.mp

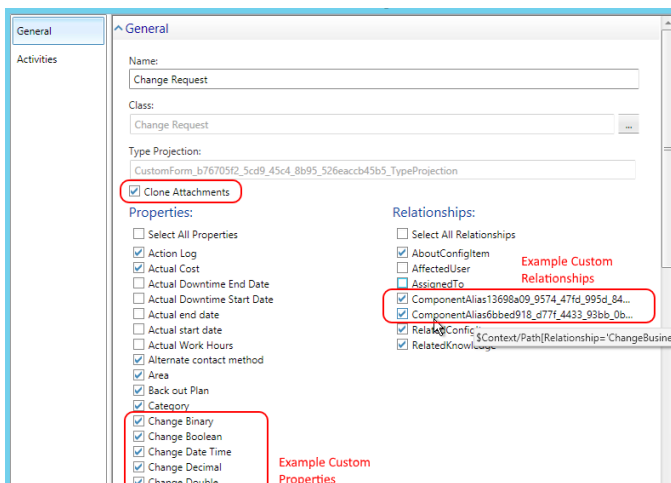
3. Clone Settings Hierarchy

Xapity Clone settings apply in the following priority order:

- 1. Xapity Team Integration** (if installed): Applies when the analyst is a member of a Xapity Team and there has been a clone configuration created for that Team.
- 2. Work Item Settings:** Applies if the Work Item has been configured.
- 3. Default Settings:** Applies if the no settings have been configured for the Team or Work Item. Very basic out of the box settings and cannot be edited.

4. Configuration of Xapity Clone

On the Work Item settings page configure each of the major Work Items



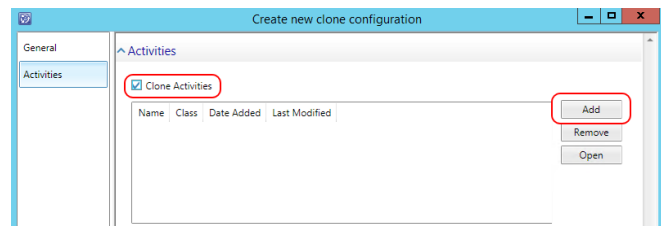
Attachments: will prompt the analyst to choose the attachments to clone to the new record. Unchecked and no attachments will be cloned.

Properties: Choose the appropriate properties to be copied. Custom properties will display with a friendly name.

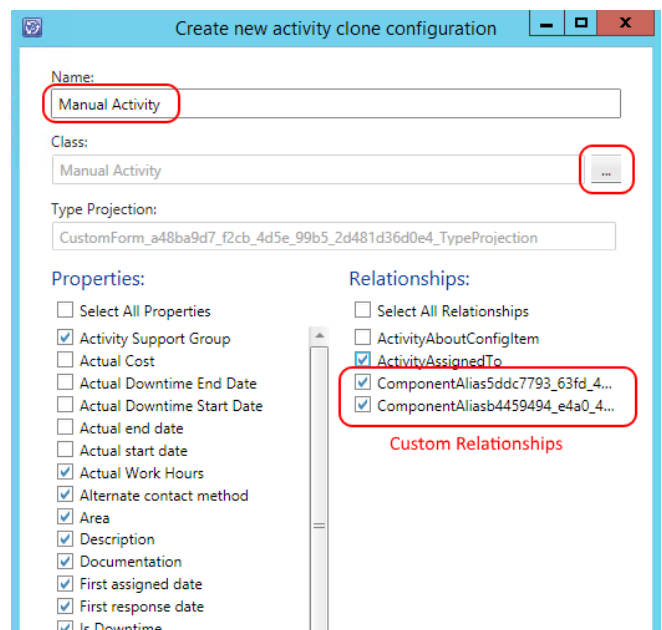
Relationships: Choose the appropriate relationships to be copied. Custom relationships will display using the component alias GUID. Hover over the relationship the context path to display a friendlier name.

Work Item – Activities Settings

For each major Work Item choose which Activities will be cloned.



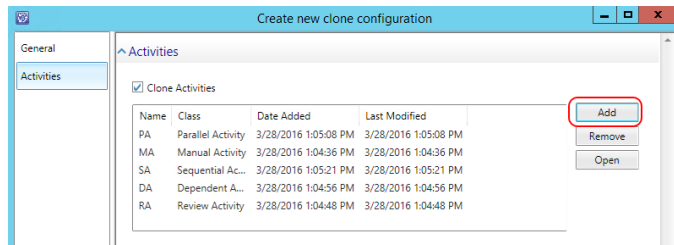
If enabled the default settings will be used if there is no setting explicitly configured for the activity type.





5. Xapity Teams Integration

If you have Xapity Teams, you have the option of creating another level of configuration settings.



Title: Add a Title for the Xapity Team Clone settings – usually a combination of the Team name and the Work Item class.

Class: Choose the Class to clone – Change Request, Release Record, Incident, Problem and Service Request.

Team: Choose the Xapity Team – it will only show Teams that have been configured for the class that was selected.

Clone Attachments: will prompt the analyst to choose the attachments to clone to the new record. Unchecked and no attachments will be cloned.

Properties: Choose the appropriate properties to be copied.

Relationships: Choose the appropriate relationships to be copied.

Activities: Configure each activity type for the Team Clone settings.

Recommendation:

Always configure each Work Item and Team clone configuration with all activities to be sure of what items will be copied.

As there are two levels of clone settings when using Teams, it can be confusing if the settings are not explicitly set at the Team level.

6. Analyst Tasks

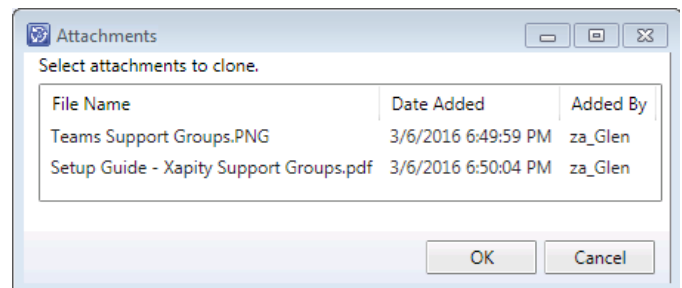
There are five analyst tasks:

- Clone Incident
- Clone Change Record
- Clone Release Record
- Clone Problem
- Clone Service Request

Use Service Manger security roles to assign the tasks to the analysts

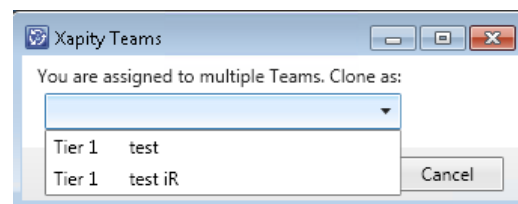
Attachments

The analyst will be required to choose the attachments they want to add to clone job.



Multiple Teams

If the analyst is a member of multiple Teams the analyst will be prompted to choose the clone settings to use.



7. Language Support and Overrides

We have also provided a language override function that can fix any translation errors or add any additional language supported by Service Manager.

Edit the unsealed management pack **Xapity.Clone.ExtendedLanguages.xml** to add the additional language or override and then import into Service Manger.