

1. Overview

Xapity Transfer can create an incident in another instance of Service Manager. It allows Analysts to easily find the status of a transferred incident and to add comments to the action log of the remote Incident.

2. Prerequisites for Xapity Transfer

- Two or more instances of Service Manager
- TCP Port 5724 between instances
- Connection account in CMDB with Advanced Operator or higher SCSM permission

3. Installation

Import Management Pack(s)

Import the following:

- Xapity.Transfer.Library.mpb
- Optional: Xapity.Transfer.Sample.View.xml, Xapity.Transfer.Sample.Notifications.xml

Copy Work Flow DLL

Copy the Xapity.Transfer.Workflow.dll to the install folder on the Workflow Server.

Restart the “Microsoft Monitoring Agent” Service.

Set the Permissions for the Transfer Class

Write Permissions are required on the new Transfer class. Add permissions to the Transfer class by running Xapity.Transfer.Permissions.Add.exe

4. Xapity Transfer Architecture

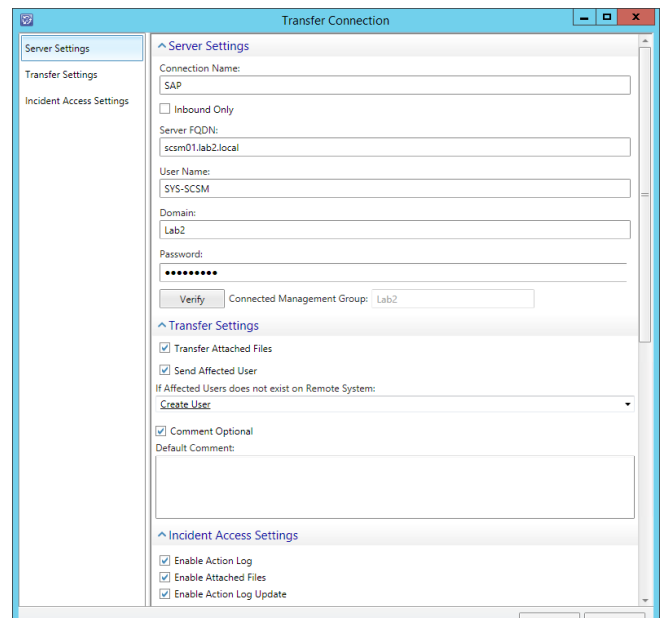
Xapity Transfer uses the concepts of **Local Instance** and **Remote Instance** to describe the Transfer process. The local instance is always the current site and the transfer process is described from this perspective.

Inbound Transfer: The local instance receives an Incident transfer from a remote instance.

Outbound Transfer: The local instance sends\transfers an Incident to a remote instance.

5. Configuration of Xapity Transfer

Create a Transfer connection for each instance of Service Manager in the Administration Settings.



5.1. Connection Settings

Connection Name: This is a display name for the connection.

Inbound Only Checkbox: Inbound transfers only, no Outbound transfers.

Server FQDN: Any management server in the remote instance.

User Name: Advanced Operator permissions in the remote instance.

Domain: The Remote instance AD domain of the User with permissions in the remote site.

Password: The password for the User above.

Verify: The verify button checks that you can connect to the remote instance

5.2. Transfer Settings

Transfer Attached Files: Enables or disables the ability to send attachments as part of the transfer.

Send Affected User: Affected User creation in the remote instance:

- Disable or choose Leave Blank
- Create Affected User
- Set System Account

Default Comment: Will add the default comment text to every transfer task.



5.3. Remote View Settings

Enable Action Log: Allows the remote analyst to view the entire action log on a local Incident.

Enable Attached Files: Allows a remote analyst to list and open all attachments.

Enable Action Log Update: Allows a remote analyst to add to the action log on a local Incident.

6. Transfer Task

Xapity Transfer task allows Analysts transfer an Incident to a remote SCSM instance.

Transfer To: list of the available SCSM instances that the incident can be transferred to.

- Support Group:** list of remote Support Groups.
- Affected User:** can change the affected user.
- Title:** local Incident Title and can be edited.
- Description:** local Incident Description and can be edited.
- Comment:** add a comment that will be added to the action log of the remote Incident.
- File Attachments:** local incident File Attachments that will be transferred to the remote incident.
- Auto Resolve Incident and Resolution Category:** when the remote Incident is resolved, the local Incident will also be resolve automatically using the Resolution Category selected.

7. Transfer Status

The Transfer Status task shows the real time details of any transfer related to an Incident. Transfer Status is bi-directional and can “see back” from either instance.

The following sections are optional:

- Action Log
- Comment (add)
- Attachments

Date	Location	Direction	State	Support Group	Transferred By
8/11/2016 6:39 PM	SAP	Outbound	Transferred	Help Desk	De Silva, Brielle
8/10/2016 10:12 PM	SAP	Outbound	Resolved	Help Desk	De Silva, Brielle

Type	Private	Comment	Created By	Date
Record Resolved		Sent Logon Guide to the User	Quirk, Adan	8/10/2016
E-Mail Sent		FROM: adanquirk@lab2.local TO: Bob.Grey@Xapity.Lab	Quirk, Adan	8/10/2016
Analyst Comment	<input type="checkbox"/>	Add Comment to Remote Job	De Silva, Brielle (brielledesilva) (External Analyst)	8/10/2016
E-Mail Sent		Assigned by Quirk, Adan to	Quirk, Adan	8/10/2016

8. Language Support and Overrides

We have also provided a language override function that can fix any translation errors and allow you to use custom branding or strings.

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