HP Release Control

for the Windows® operating systems

Software Version: 5.00

Deployment Guide

(hp) ®

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Acknowledgements

This product includes software developed by the Apache Software Foundation (http://www.apache.org/).

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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.

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http://h20230.www2.hp.com/selfsolve/manuals

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http://h20229.www2.hp.com/passport-registration.html

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

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Table of Contents

Welcome to This Guide

Welcome to the *HP Release Control Deployment Guide*, which explains how to install and deploy HP Release Control software and how to upgrade to the latest version. HP Release Control provides a common platform of decision support for Change Advisory Board members and implementation teams during the release life cycle. HP Release Control analyzes each change request in the system and provides real-time information and alerts during implementation. In addition, HP Release Control enables collaboration, feedback, and review throughout the release life cycle.

This chapter includes:

➤ How This Guide Is Organized on page 8

➤ Who Should Read This Guide on page 8

➤ HP Release Control Documentation on page 8

➤ Additional Online Resources on page 9

How This Guide Is Organized

This guide contains the following parts:

Chapter 1 **Installing and Deploying HP Release Control**

Provides instructions on how to install and deploy HP Release Control.

Chapter 2 **Upgrading HP Release Control**

Provides instructions on how to upgrade to the latest version of HP Release Control.

Who Should Read This Guide

This guide is intended for the HP service engineers who are responsible for installing and deploying or upgrading HP Release Control.

HP Release Control Documentation

HP Release Control comes with the following documentation:

HP Release Control Deployment Guide explains how to install and deploy HP Release Control. This guide is accessible in the following formats, from the following locations:

➤ in PDF format on the HP Release Control DVD

➤ in PDF format by selecting **Help** > **HP Release Control Documentation Library** from the HP Release Control application

HP Release Control User Guide explains how to use and configure the HP Release Control application. This guide is accessible in the following formats, from the following locations:

➤ in PDF format on the HP Release Control DVD

➤ in both PDF format and online HTML help format by selecting **Help** > **HP Release Control Documentation Library** from the HP Release Control application

➤ in HTML help format, from specific HP Release Control application windows, by clicking in the window and pressing F1, or by selecting **Help** from the main menu

HP Release Control API Reference explains how to work with HP Release Control's API. The API Reference is available in CHM format on the HP Release Control DVD, or from the HP Release Control application by selecting **Help** > **HP Release Control Documentation Library**.

HP Release Control Readme provides information on what's new in the current version of the product as well as comprehensive information on known problems and limitations. The Readme is available in HTML format on the HP Release Control DVD, or from the HP Release Control application by selecting **Help** > **HP Release Control Documentation Library**.

Note: Anything published in PDF format can be read and printed using Adobe Reader, which can be downloaded from the Adobe Web site (http:// www.adobe.com).

Additional Online Resources

HP Software Support accesses the HP Software Support Web site. This site enables you to browse the Self-solve knowledge base. You can also post to and search user discussion forums, submit support requests, download patches and updated documentation, and more. Choose **Help** > **HP Software Support**. The URL for this Web site is www.hp.com/go/hpsoftwaresupport.

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract.

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

To register for an HP Passport user ID, go to:

http://h20229.www2.hp.com/passport-registration.html

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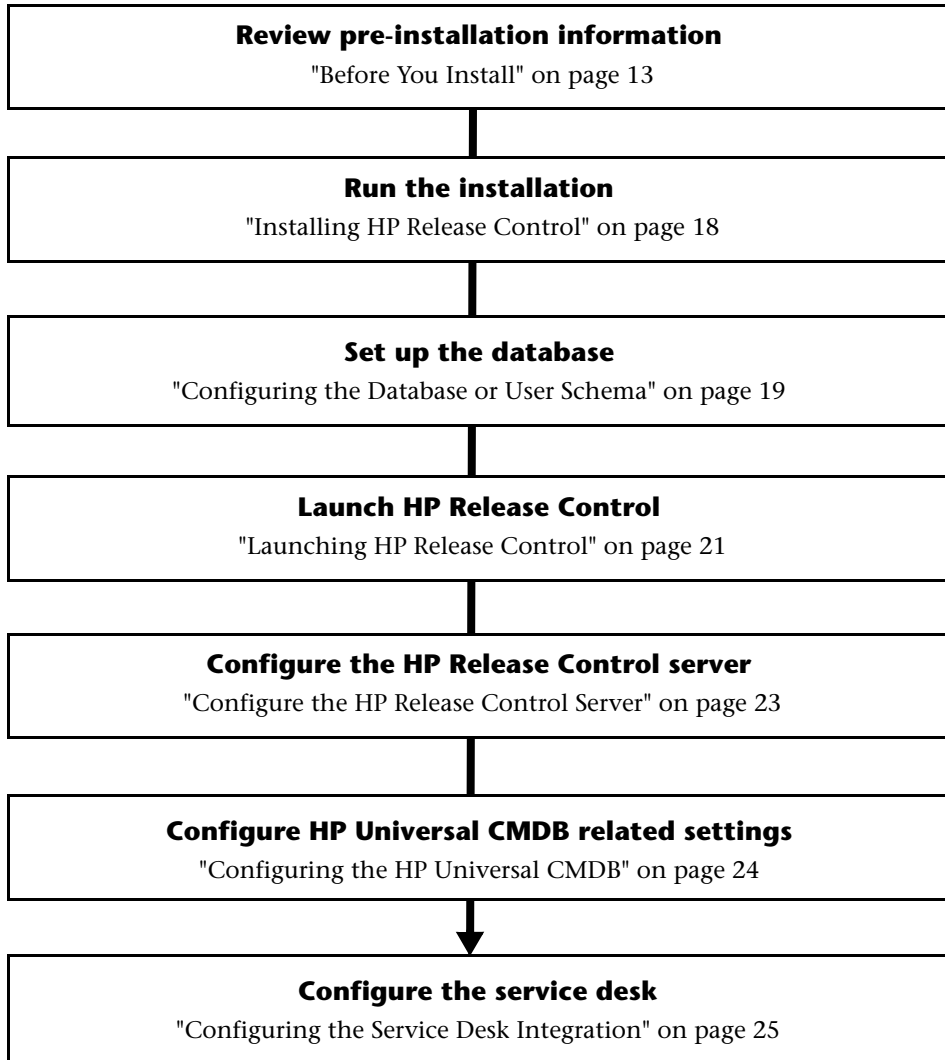
1

Installing and Deploying HP Release Control

This chapter provides instructions on how to install and deploy HP Release Control.

This chapter includes:

➤ The Deployment Process: Basic Steps on page 12

➤ Before You Install on page 13

➤ Installing HP Release Control on page 18

➤ Configuring the Database or User Schema on page 19

➤ Launching HP Release Control on page 21

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➤ Configuring the HP Universal CMDB on page 24

➤ Configuring the Service Desk Integration on page 25

➤ Working with HP Release Control Configuration Settings on page 59

The Deployment Process: Basic Steps

This following diagram describes the basic steps involved in getting your HP Release Control environment up and running:

Review pre-installation information

"Before You Install" on page 13

Run the installation

"Installing HP Release Control" on page 18

Set up the database

"Configuring the Database or User Schema" on page 19

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Before You Install

Before you install HP Release Control, review the information in this section, including the system requirements. This section includes:

➤ "Supported Service Desks" on page 13

➤ "Server System Requirements" on page 15

➤ "Client Requirements" on page 16

➤ "HP Release Control Advanced Deployment Options" on page 16

➤ "HP Release Control Data Flow" on page 17

➤ "System Architecture" on page 18

Supported Service Desks

The Service Desk Integration module supports the following service desk applications:

Application	Version
HP Project and Portfolio Management/ Mercury IT Governance Center	➤ 6.0 SP 14 ➤ 7.1 SP6 ➤ 7.5 SP2 ➤ 8.0
HP Service Manager/Center	➤ 6.2.x ➤ 7.0 ➤ 7.01 with IIA ➤ 7.10 ➤ 7.11
HP Server Automation	7.1 (See readme limitations)
HP Network Automation	7.0 (See readme limitations)
HP Service Desk	4.5
BMC Remedy Action Request System	➤ 5.0 ➤ 7.0

Feature Availability per Service Desk

Certain HP Release Control features are only available when you integrate with certain service desk applications. The following table describes these features and specifies their availability per service desk. Service desks that are not listed in this table do not include these features.

Note: SM = HP Service Manager, **SC** = HP ServiceCenter, and **PPM** = HP Project and Portfolio Management / Mercury IT Governance Center

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Feature	SM	SC	PPM
Update Approval status. Approval of a change request in the Analysis module **Collaborate** > **Resolution** tab, results in an updated status of the request within the service desk.	yes	yes	yes
Retract approval. Retracting approval of a change request in the Analysis module **Collaborate** > **Resolution** tab, results in an updated status of the request within the service desk.	yes	yes	no
Update planned times. After you run a simulation in the Analysis module Change Planner, you can save the updated start and end times to the originating service desk.	yes	yes	no
Update actual times. In the Director and Implementor modules, you can update the actual start and end time of an activity. These times are automatically updated in the originating service desk ticket.	yes	yes	no
Update Post Implementation Review. The data that you update in the Post Implementation Review dialog box in the **Review** > **Conclusions** tab is updated in the origination service desk.	yes	yes	no
C**losing Tickets from HP Release Control.** You can close service desk tickets from the Analysis module **Review** > **Conclusions** tab.	yes	yes	no
Update analysis information. The originating service desk ticket is updated with analysis information from HP Release Control (for example risk level and impact analysis)	yes (requires configuration)	no	no

Server System Requirements

The following table describes the system requirements for the HP Release Control server:

CPU	Intel Pentium 4
Memory (RAM)	Minimum of 2 GB
Free Disk Space	Minimum of 5 GB
Machine	➤ VMware ➤ Physical
Operating System	The following 32/64-bit Windows operating systems are supported: ➤ Windows 2003 Server Enterprise Edition Service Pack 2 ➤ Windows Server 2008
Database	➤ Microsoft SQL Server 2005 SP2; 2005 Compatibility Mode 80; (Enterprise Editions for all) ➤ Oracle 9.2.0.8, 10.2.x, 11.1.x
HP Universal CMDB	➤ HP Universal CMDB version 7.0x, 7.5x, 8.0x (Typical CMDB Installation) For a full list of system requirements for each of these versions, refer to the HP Universal CMDB documentation.

Client Requirements

The following table describes the client requirements for viewing HP Release Control:

|	
Browser	➤ Microsoft Internet Explorer 6.0, 7.0. **Note:** It is recommended to set Internet Explorer to check for newer versions of stored pages every time you visit the page. For example, in version 6.0, select **Tools > Internet Options > General** tab. In the **Temporary Internet files** area, click **Settings** and select the **Every visit to the page** option. ➤ Mozilla Firefox 3.x **Note:** You cannot view the HP Universal CMDB user interface components with Firefox.
Flash Player Browser Plugin	Flash Player 9 or above
Screen Resolution	➤ Minimum 1024x768 ➤ Recommended 1280x1024
Color Quality	Minimum of 16 bit **Note:** If you are logging on to the HP Release Control server through a remote connection, ensure that the Remote Desktop color display setting is set to a minimum of 16 bit.

HP Release Control Advanced Deployment Options

In addition to the regular deployment, HP Release Control can also be deployed with the following options:

➤ **Cluster deployment.** HP Release Control can be deployed on multiple nodes. For details, refer to the section about setting up a cluster deployment in the *HP Release Control User Guide*.

➤ **Web servers.** You can configure HP Release Control to work with a Web server (Microsoft Internet Information Services (IIS) 5.x or 6.x or Apache HTTP Server 2.2.x). For details, refer to the section about configuring a Web server in the *HP Release Control User Guide*.

➤ **Identity management.** You can configure HP Release Control to work with a third party identity management solution such as CA SiteMinder. For details, refer to the section about identity management in the *HP Release Control User Guide*.

HP Release Control Data Flow

The following diagram illustrates the data flow when running HP Release Control:
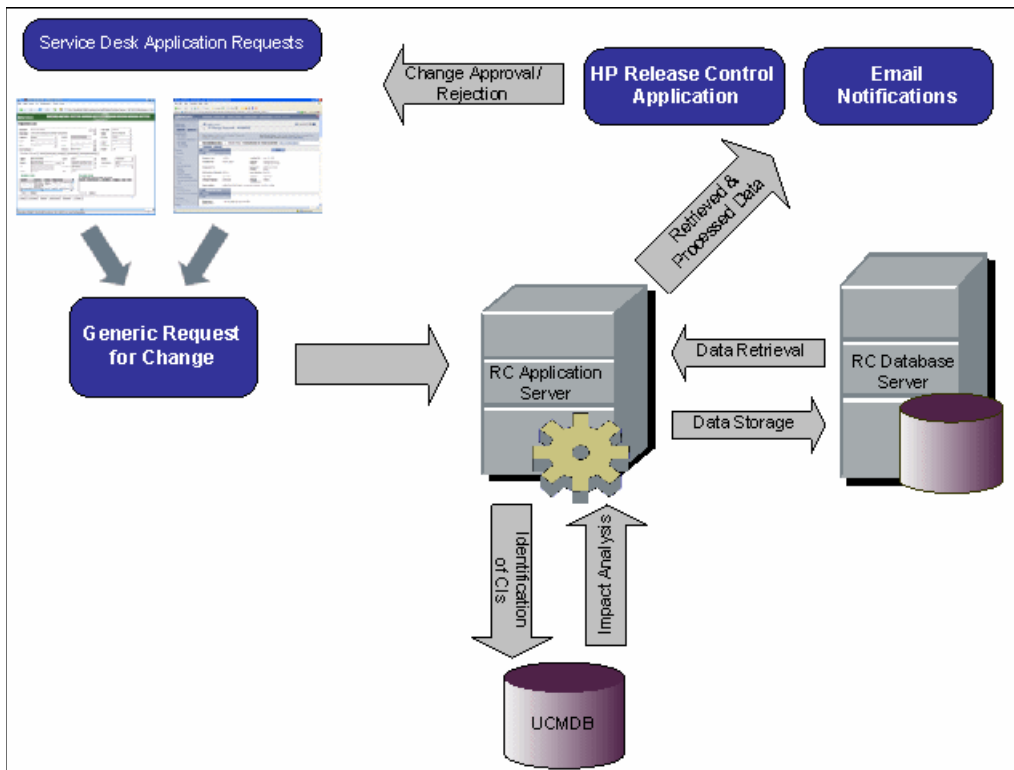
➤ Change requests originate in the Service Desk application and are converted into generic requests.

➤ HP Release Control sends the requests to HP Universal CMDB for analysis and to determine the relationships between configuration items (CIs).

➤ HP Release Control takes the data from HP Universal CMDB and performs impact analysis.

➤ HP Release Control further analyzes change requests, performing calculations such as risk and collision analysis.

➤ The information is stored on the HP Release Control Database Server.

➤ Email notifications are sent according to configuration settings to decision makers, and changes are approved or rejected.

System Architecture

HP Release Control is a 3-tier application which consists of following:

➤ Flash-based (fat) client, accessed using a Web browser

➤ Application servers

➤ Database servers

The database servers and the HP Release Control application servers must sit on the same LAN.

Installing HP Release Control

You install HP Release Control using the InstallShield Wizard for HP Release Control.

To install HP Release Control:

1 Click the **setup.exe** file located in the **Setup** folder of your HP Release Control installation disk. The InstallShield Wizard for HP Release Control opens. Click **Next**.

2 Accept the terms of the software license agreement that is displayed. Click **Next**.

3 Accept the default installation directory or click **Browse** to select a different directory. Note that the directory you select cannot contain spaces. Click **Next**.

4 Ensure that the information in the summary screen is correct.

To review or change any settings, click **Back**. To accept the settings and begin installing HP Release Control, click **Next**.

5 When the installation process has successfully been completed, click **Finish** in the final InstallShield Wizard screen.

Note: If you are in the middle of performing the **upgrade procedure**, continue with step 2 of "Stage 2: Install and Upgrade HP Release Control" (see page 65).

Configuring the Database or User Schema

To work with HP Release Control, you must create either a Microsoft SQL Server database or an Oracle Server user schema. You then configure connection properties for the HP Release Control database or user schema using the Database Configuration Wizard.

Note: For MS SQL Server and Oracle Server system requirements, see "Server System Requirements" on page 15.

For information and guidelines about configuring and maintaining MS SQL and Oracle Server databases, see the section about database configuration and maintenance in the *HP Release Control User Guide*.

To configure your database:

1 Allocate a Microsoft SQL Server database or an Oracle Server user schema.

➤ For **MS SQL Server 2005**: Activate snapshot isolation.

Execute the following command once after creating the database:

```
alter database <ccm_database_name> set read_committed_snapshot on
```

For more information about the SQL Server snapshot isolation feature, see http://msdn.microsoft.com/en-us/library/tcbchxcb(VS.80).aspx.

➤ **For Oracle**: Grant the Oracle user only **Connect** and **Resource** roles. (Populate will fail if the Oracle user has the **Select any table** privilege.)

2 Verify the following information, which you will need during this configuration process:

✔	Required Information
	DB host name and port
	DB user name and password
	For MS SQL: Database name
	For Oracle: SID

3 Before you run the Database Configuration Wizard, consider the following:

➤ **Advanced configuration options**. If you select the advanced configuration option in the wizard, you can specify advanced database properties, such as minimum and maximum pool size. For more information about these options, see http://www.mchange.com/projects/c3p0/index.html#configuration_properties

➤ **MS SQL URL.** If you select the advanced configuration option in the wizard, you need to specify the connection URL of the JTDS MSSQL. Include a valid MS SQL server name and database name.

For example:

```
jdbc:jtds:sqlserver://myServer:1433/
myDataBase;sendStringParametersAsUnicode=false
```

For details about configuring the URL format, see http://jtds.sourceforge.net/faq.html#urlFormat

➤ **Oracle URL.** If you select the advanced configuration option in the wizard, you need to specify the connection URL of the Oracle native driver. Include a valid Oracle server name and SID. Alternatively, if you are using **Oracle RAC**, specify the Oracle RAC configuration details.

➤ **Password Encryption.** In the configuration page of the wizard, it is recommended to select the **Encrypt Password** option to encrypt your password in the database properties file.

4 Run the Database Configuration Wizard by selecting **Start** > **Programs** > **HP Release Control 5.00** > **Database Configuration Wizard**.

Note: If you are in the middle of performing the **upgrade procedure**, continue with step 4 of "Stage 2: Install and Upgrade HP Release Control" (see page 65).

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5 When you complete the database configuration, populate the database as follows:

Change the command line directory to **<HP Release Control installation directory>\bin** and run the following command:

```
Populate.bat i
```

Launching HP Release Control

This section describes how to launch HP Release Control.

To launch HP Release Control:

1 If you are using an Apache Web server, restart your Web server.

2 Start the HP Release Control service.

a From the Windows menu, select **Start** > **Run** and type **services.msc**.

b In Services window, select **HP ReleaseControl 5.00 <server name>** and click **Start Service**.

Note: It may take a few minutes for the server to complete the start-up process.

---

3 Enter the appropriate URL to access HP Release Control (depends on the user authentication mode you are using). For example:

```
http://server:8080/ccm
```

4 Log in to HP Release Control with the user name **admin** and the password **admin**. Ensure that you change this password once you log in. For details on changing your password and creating HP Release Control users, see the section about configuring users in the *HP Release Control User Guide*.

Note: If you are working with HP Release Control's identity management solution or LDAP authentication, see the section about security configuration in the *HP Release Control User Guide* for details on adding an administrator and users to HP Release Control.

Configure the HP Release Control Server

This section describes how to configure the HP Release Control server.

 1 Log on to HP Release Control (See "Launching HP Release Control" on page 21).

 2 Select **Module** > **Administrator** > **Configuration** > **Server** and define the following settings in the Server pane:

UI Elements	Description
Server name	Enter the server's Fully Qualified Domain Name (FQDN). **Note:** ➤ Do not use the default value **localhost** or the IP address. ➤ If you cluster two or more HP Release Control servers behind a load balancer, specify the domain name of the load balancer.
Server address	Specify the HP Release Control server address as follows: ➤ If you install one HP Release Control server, specify the URL of this machine. **Note:** If you are using a web server, use the port of the web server. ➤ If you cluster two or more HP Release Control servers behind a load balancer, specify the URL of the load balancer.
SMTP host	Enter the host name of the SMTP mail server machine.
SMTP port	Specify the port to be used to connect to the SMTP mail server.
SMTP username	Specify the user name required to connect to the SMTP mail server, if one is required.
SMTP password	Enter the password required to connect to the SMTP mail server. If the password must be encrypted, see the section about password encryption in the *HP Release Control User Guide*.

 3 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

4 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

5 Stop the HP Release Control service:

   a From the Windows menu, select **Start > Run** and type **services.msc**.

   b In Services window, select **HP ReleaseControl 5.00 <server name>** and click **Stop Service**.

6 Start the HP Release Control service again.

Configuring the HP Universal CMDB

This section contains mandatory configuration settings for configuring HP Release Control interaction with HP Universal CMDB.

For information on optional HP Universal CMDB configuration settings, see the section about HP Universal CMDB configuration in the *HP Release Control User Guide*.

Note: If you are working without HP Universal CMDB (Standalone mode), see the section about configuring HP Release Control to work in Standalone mode in the *HP Release Control User Guide*.

To configure the HP Universal CMDB:

1 Deploy the **ccm_package.zip** file in the HP Universal CMDB.

The **ccm_package.zip** file is located in the **<HP Release Control installation directory>\uCmdb\ucmdb-<version>\extensions** folder. For more information about deploying packages, see the HP Universal CMDB documentation.

2 Log on to HP Release Control (See "Launching HP Release Control" on page 21).

3 Select the HP Universal CMDB version number.

    a In HP Release Control, select **Module** > **Administrator** > **Configuration** tab > **Integrations** > **HP Universal CMDB**.

    b In the right pane, In the **HP Universal CMDB** version box, select the appropriate version.

4 Enter the HP Universal CMDB server details.

    a Select **Integrations** > **HP Universal CMDB** > **Available Connections** > **Enter a valid CMDB server name**.

    b In the right pane, in the **HP Universal CMDB server name** box, enter the DNS name of the server on which HP Universal CMDB is installed.

    c In the **Port** box, specify the port used by the HP Universal CMDB server.

    d If you are using HP Universal CMDB version 8.0.x, specify the user name and password needed to access HP Universal CMDB, in the relevant boxes.

5 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

6 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

Configuring the Service Desk Integration

The configuration of your service desk differs depending on which service desk you are using:

Service Desk	Instructions:
HP Service Manager	"Configuring HP Service Manager Integration" on page 26
HP ServiceCenter	"Configuring HP ServiceCenter Integration" on page 33
HP Project and Portfolio Management / IT Governance Center	"Configuring HP Project and Portfolio Management / IT Governance Center Integration" on page 39

Service Desk	Instructions:
BMC Remedy Action Request System	"Configuring BMC Remedy Action Request System Integration" on page 43
HP Service Desk	"Configuring HP Service Desk Integration" on page 47
Database	"Configuring a Database as a Service Desk" on page 50
XML file	"Configuring an XML File as a Service Desk" on page 54
HP Server Automation and HP Network automation.	"Configuring HP Server Automation or HP Network Automation as Your Service Desk" on page 57

Configuring HP Service Manager Integration

This task describes how to configure HP Service Manager as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" on page 29

➤ "Stage 3: Apply Configuration Changes" on page 30

Stage 1: Prerequisites

1 Verify the following information, which you will need during this configuration process:

✔	Required Information
	HP Service Manager version
	For versions of HP Service Manager earlier than 7.10: Is IIA (ITSM Implementation Accelerator) content enabled in HP Service Manager?
	Is HP's Lightweight Single Sign On (LW-SSO) used?
	HP Service Manager **user name**, **password**, **time zone**, **host name**, and **port** **Note**: Use the Java naming conventions for time zones.

✔	**Required Information**
	Is HTTPS required in order to access HP Service Manager WSDL file? **Note:** If HP Service Manager is configured using SSL, you need to import the SSL certificate from HP Service Manager to the HP Release Control server.
	URL suffix for the HP Service Manager WSDL file (by default, sc62server/ PWS)

Note: If HP Service Manager is deployed with the default load balancer, instead of establishing a direct connection with the HP Service Manager server, HP Release Control will establish connections with each HP Service Manager user. To optimize the connection between HP Service Manager and HP Release Control, use a different load balancer for HP Service Manager.

 2 **If you are using a version of HP Service Manager earlier than 7.10, and IIA content is not enabled:** In the HP Service Manager Client, go to **System Definition** > **Tables** > **cm3t**. Add the fields **actualEnd** and **actualStart**. Set the Data type to **Date/time**.

 3 Load the HP Release Control unload files as follows:

 a In the HP Service Manager Client, select the Database Manager.

 b Select the **Import/Load** option from the drop-down menu.

 c Load the relevant HP Service Manager files from <**HP Release Control installation directory**>**examples****service-desk-examples**\ **ServiceManager**\<**relevant HP Service Manager version**>**unload-files**.

Caution: If you are using HP Service Manager 7.11 (webtier), the **SMRC1.2_Demo_v6.22.unl** unload file may overwrite previous menu and format customizations. This file enables you to access HP Release Control interfaces, such as the change calendar, directly from HP Service Manager 7.11.

If you prefer to manually perform the steps carried out by this unload file, instead of loading it, see "Appendix: Manual Steps for SMRC1.2_Demo_v6.22.unl" on page 32.

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d For each file, click **Load FG**.

4 **If you are using HP Service Manager 7.11 (webtier):** Copy the contents of **<HP Release Control installation directory>\example\ service-desk-examples\ServiceManager\service-manager-711\webtier\i mages\obj16** to the corresponding HP Service Manager webtier directory.

5 Configure the HP Release Control server URL in HP Service Manager:

 a In HP Service Manager, go to **System Administration** > **Base System Configuration** > **Miscellaneous** > **System Information Record**.

 b In the **Active Integrations tab**, select **HP Release Control**.

 c In the Server URL box, enter the URL of the HP Release Control server. For example:

```
http://server:8080/ccm
```

6 Users who will access HP Service Manager from HP Release Control need to have **SOAP API Execute Capabilities** enabled. In HP Service Manager, ensure that this option is enabled for the relevant operators.

7 (**Optional**) As part of the **SdiConfigurer.bat** utility you will run in the next stage, certain HP Service Manager fields will be automatically mapped to HP Release Control fields. If you want to map any additional fields, expose these fields now in the HP Service Manager **ChangeRC/ ChangeTaskRC** External Access object. You will map these fields in conversion scripts in step 3 of "Stage 3: Apply Configuration Changes" (see page 31).

Note: To expose and map fields, ensure that you are using **ChangeRC** and **ChangeTaskRC** external access objects that are dedicated to HP Release Control instead of using the default **Change** and **ChangeTask** external access objects.

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```
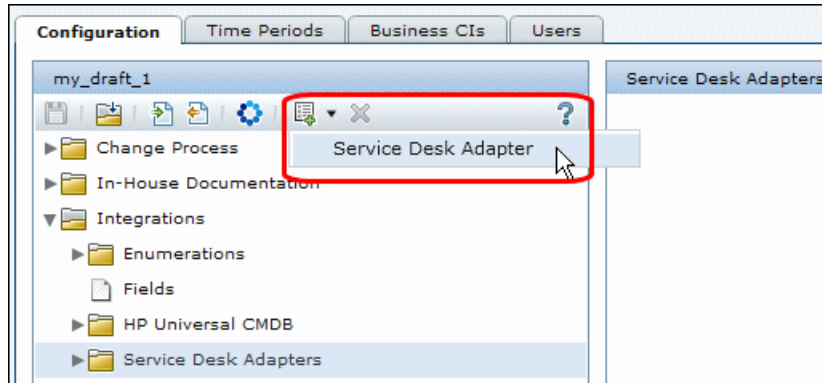
For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.
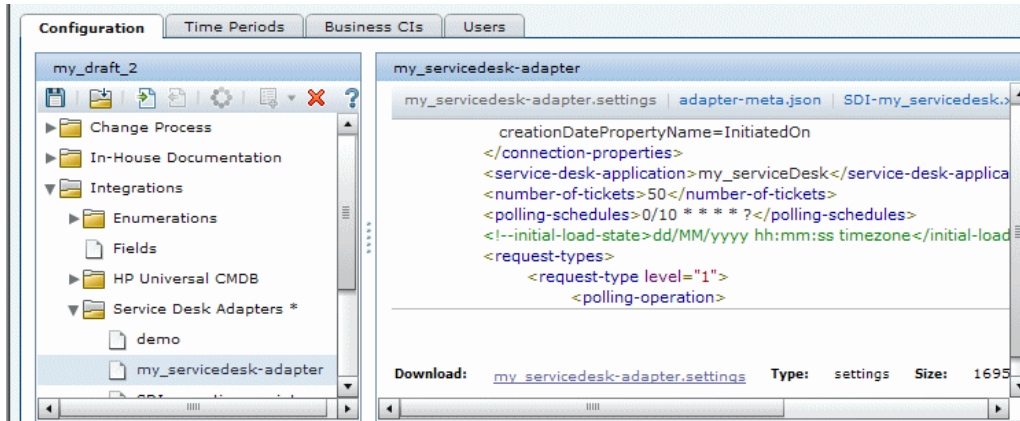
Stage 3: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the **Integrations** > **Service Desk Adapters** node. The node includes the new service desk configuration files. Each configuration file is displayed in the right pane in a separate tab. For example:

3 If you exposed additional fields in step 7 of "Stage 1: Prerequisites" (see page 29), map these fields in the relevant conversion scripts (**convertChange.js/convertTask.js**).

➤ To view the conversion scripts, select the **Integrations** > **Service Desk Adapters** > **<adapter name>** node and select the relevant tab in the right pane that displays the file.

➤ To make changes to the scripts, see "Modifying Configuration Files in the Configuration Tab" on page 60.

4 You can configure HP Release Control to update HP Service Manager with Analysis information. For details, see the relevant section in the *HP Release Control User Guide*

5 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

6 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

Note: To modify your service desk settings after the initial configuration, see the section about advanced service desk configuration in the *HP Release Control User Guide*.

Appendix: Manual Steps for SMRC1.2_Demo_v6.22.unl

The **SMRC1.2_Demo_v6.22.unl** file enables you to access HP Release Control interfaces directly from HP Service Manager. This unload file may overwrite previous menu and format customizations. This section describes how to manually perform the steps carried out by this unload file, instead of loading it.

To manually perform the steps carried out by the SMRC1.2_Demo_v6.22.unl file:

1 Add the following four fields in the **Info** table:

Field Name	Data Type
RC	Logical
RC.server.url	Character
RC.SD.name	Character
RC.task	Logical

2 Using the **Form Designer**, modify the **info.company.g** form, by adding the following controls:

Control	Type	Input
HP Release Control	Checkbox	RC
Server URL	Text	RC.server.url
Specified Service Desk	Text	RC.SD.name
Enable RC link for Change Tasks	Checkbox	RC.task

3 For the **ChM** menu name, add the following option:

Description	Application	Condition
RC Calendar	us.launch.rc .calendar	stem.info=1 and nullsub($G.ess, false)=false and sysinfo.get("environment")#"scguiwweb" and lioption("Change Management") and (index("SysAdmin", $lo.ucapex)>0 or index("ChMAdmin", $lo.ucapex)>0 or index("change request", $lo.ucapex)>0)

4 For the **CM DETAIL** menu name, add the following option:

Description	Application	Condition
RC Calendar	us.launch.rc .calendar	RC in $G.system.info=1 and nullsub($G.ess, false)=false and sysinfo.get("environment")#"scguiwweb"

5 To verify this change, open a non-closed change with Affected-CI from the web client and check that the **RC calendar** option is available in the **Detail Options** context menu.

Configuring HP ServiceCenter Integration

This task describes how to configure HP ServiceCenter as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" on page 37

➤ "Stage 3: Apply Configuration Changes" on page 37

Stage 1: Prerequisites

1 Verify the following information, which you will need during this configuration process:

✔	Required Information
	HP ServiceCenter version
	Is HP's Lightweight Single Sign On (LW-SSO) used?
	HP Service Manager **user name**, **password**, **time zone**, **host name**, and **port** **Note**: Use the Java naming conventions for time zones.
	Is HTTPS required in order to access HP Service Manager WSDL file? **Note:** If HP ServiceCenter is configured using SSL, you need to import the SSL certificate from HP ServiceCenter to the HP Release Control server.
	URL suffix for the HP Service Manager WSDL file

Note: If HP ServiceCenter is deployed with the default load balancer, instead of establishing a direct connection with the HP ServiceCenter server, HP Release Control will establish connections with each HP ServiceCenter user. To optimize the connection between HP ServiceCenter and HP Release Control, use a different load balancer for HP ServiceCenter.

2 Load the HP Release Control unload files as follows:

a In the HP ServiceCenter Client, select the **Database Manager**.

b Select the **Import/Load** option from the drop-down menu.

c Load the relevant HP ServiceCenter file from **<HP Release Control installation directory>\examples\service-desk-examples\ ServiceCenter\<relevant HP ServiceCenter directory>\unload-files**.

d Click **Load FG**.

3 In the HP ServiceCenter Client (Eclipse Client), go to **System Definition >
Tables > cm3r**. Add the fields **implementationEnd** and
implementationStart. Set the Data type to **Date/time** and check the
Include in API box.

4 In the HP ServiceCenter Client, go to **System Definition>Tables>cm3t**.
Add the fields **actualEnd** and **actualStart**. Set the Data type to **Date/time**
and check the **Include in API** box.

5 Expose the relevant HP ServiceCenter change fields.

    a In HP ServiceCenter, select **Menu Navigation > Toolkit > WSDL
Configuration**.

    b In the **name** box, type cm3r and press ENTER.

    c In the Data Policy tab, ensure that the following fields with the
appropriate properties are included in the list of exposed fields:

Field Name	API Caption	Exclude	API Data Type
approval.structure,approvals.required	ApprovalsRequired	false	
approval.structure,approved.groups	ApprovedGroups	false	
approval.structure,current.pending.groups	CurrentPendingGroups	false	
header,orig.date.entered	OrigDateEntered	false	
implementationEnd	ImplementationEnd	false	DateTimeType
implementationStart	ImplementationStart	false	DateTimeType
sysmodtime	sysmodtime	false	

    d Click **Save**.

6 Expose the relevant HP ServiceCenter task fields.

    a In HP ServiceCenter, select **Menu Navigation > Toolkit > WSDL
Configuration**.

    b In the **name** box, type cm3t and press ENTER.

c In the Data Policy tab, ensure that the following fields with the appropriate properties are included in the list of exposed fields:

Field Name	API Caption	Exclude	API Data Type
actualEnd	ActualEnd	false	DateTimeType
actualStart	ActualStart	false	DateTimeType
approval.structure,approvals.required	ApprovalsRequired	false	
approval.structure,approved.groups	ApprovedGroups	false	
approval.structure,current.pending.groups	CurrentPendingGroups	false	
header,approval.status	ApprovalStatus	false	
header,orig.date.entered	OrigDateEntered	false	
header,priority.code	Priority	false	
header,risk.assessment	RiskAssessment	false	
middle,asset	Asset	false	
sysmodtime	sysmodtime	false	

d Click **Save**.

7 Restart HP ServiceCenter

8 (Optional) As part of the **SdiConfigurer.bat** utility you will run in the next stage, certain HP ServiceCenter fields will be automatically mapped to HP Release Control fields. If you want to map any additional fields, expose these fields now in the HP ServiceCenter **Change/ChangeTask** External Access object. In step 3 of "Stage 3: Apply Configuration Changes" (see page 38), you will map these fields in the conversion scripts.

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```
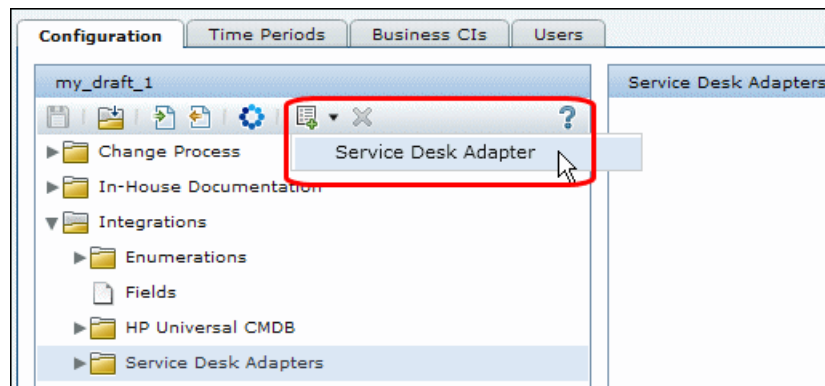
For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.

Stage 3: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the **Integrations** > **Service Desk Adapters** node. The node includes the new service desk configuration files. Each configuration file is displayed in the right pane in a separate tab. For example:

3 If you exposed additional fields in step 8 of "Stage 1: Prerequisites" (see page 36), map these fields in the relevant conversion scripts (**convertChange.js/convertTask.js**).

➤ To view the conversion scripts, select the **Integrations** > **Service Desk Adapters** > **<adapter name>** node and select the relevant tab in the right pane that displays the file.

➤ To make changes to the scripts, see "Modifying Configuration Files in the Configuration Tab" on page 60.

4 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

5 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

6 Users who will access HP ServiceCenter from HP Release Control need to have **SOAP API Execute Capabilities** enabled. In HP ServiceCenter, ensure that this option is enabled for the relevant operators.

Note: To modify your service desk settings after the initial configuration, see the section about advanced service desk configuration in the *HP Release Control User Guide*.

Configuring HP Project and Portfolio Management / IT Governance Center Integration

This task describes how to configure HP Project and Portfolio Management / IT Governance Center as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" on page 40

➤ "Stage 3: Apply Configuration Changes" on page 41

Stage 1: Prerequisites

1 Verify the following information, which you will need during this configuration process:

✔	Required Information
	HP Project and Portfolio Management / IT Governance Center version
	service desk **user name**, **password**, **host name**, and **port**

✔	**Required Information**
	(optional) If you want to enable approval integration with HP Release Control whereby the approval of a change request in HP Release Control, results in an updated status of a workflow step within the service desk, you need to provide the following information: ➤ Source Workflow Step. Decide which step in HP Project and Portfolio Management requires approval. This step will be updated with the HP Release Control approval status. ➤ Oracle DB SID (System ID) ➤ Oracle DB host name ➤ Oracle DB port ➤ Oracle DB user name ➤ Oracle DB password
	Write down the **workflow steps** from HP Project and Portfolio Management. This information is found within the HP Project and Portfolio Management workbench. For more information, refer to the HP Project and Portfolio Management documentation.

2 For versions earlier than HP Project and Portfolio Management version 7.5: If your HP Project and Portfolio Management / IT Governance Center Web Services service desk application is synchronized with the CMDB server, add a new change request field in HP Release Control named **mam-ticket-id** of type **text**. Apply the analysis rule **mam-ticket** to this field, with the analysis rule level set to both **Change** and **Task**.

For information about creating new change request fields and applying analysis rules, see the section about creating or modifying change request fields in the *HP Release Control User Guide*.

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```
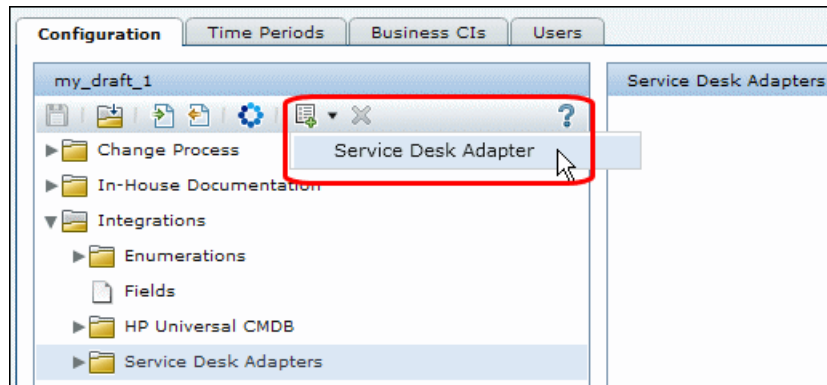
For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.

Stage 3: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the **Integrations** > **Service Desk Adapters** node. The node includes the new service desk configuration files. Each configuration file is displayed in the right pane in a separate tab. For example:

3 Map the workflow steps (that you wrote down earlier as part of the configuration prerequisites) from HP Project and Portfolio Management to status names in HP Release Control in the relevant conversion scripts (**convertRelease.js/convertChange.js**).

➤ To view the conversion scripts, select the **Integrations** > **Service Desk Adapters** > **<adapter name>** node and select the relevant tab in the right pane that displays the file.

➤ To make changes to the scripts, see "Modifying Configuration Files in the Configuration Tab" on page 60.

4 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

5 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

> **Note:** To modify your service desk settings after the initial configuration, see the section about advanced service desk configuration in the *HP Release Control User Guide*.

Configuring BMC Remedy Action Request System Integration

This task describes how to configure BMC Remedy Action Request System as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" on page 43

➤ "Stage 3: Copy BMC Remedy Files to HP Release Control" on page 44

➤ "Stage 4: Apply Configuration Changes" on page 45

Stage 1: Prerequisites

Verify the following information, which you will need during this configuration process:

✔	Required Information
	BMC Remedy version
	BMC Remedy **user name**, **password**, and **server name**

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```

For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.

Stage 3: Copy BMC Remedy Files to HP Release Control

To connect to the BMC Remedy Action Request System service desk application, you must first ensure that certain BMC Remedy Action Request System files are accessible to the HP Release Control server.

1 Stop the HP Release Control service:

 a From the Windows menu, select **Start > Run** and type **services.msc**.

 b In Services window, select **HP ReleaseControl 5.00 <server name>** and click **Stop Service**.

2 Copy BMC Remedy files to HP Release Control

 ➤ **If you are working with BMC Remedy ARS 5.0:**

 a Copy **arapi50.jar** and **arutil50.jar** from the BMC Remedy Action Request System installation directory to the **<HP Release Control installation directory>\tomcat\lib** directory.

 b Copy **arapi50.dll**, **arjni50.dll**, **arrpc50.dll**, and **arutl50.dll** from the BMC Remedy Action Request System installation directory to the **<HP Release Control installation directory>\apps\ccm\ WEB-INF\os_lib\win32** directory on the HP Release Control server machine.
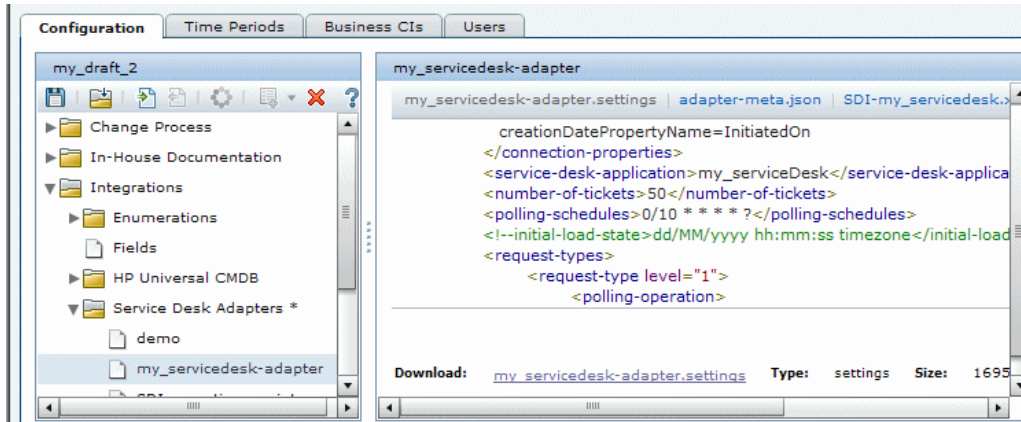
 ➤ **If you are working with BMC Remedy ARS 7.0:**

    c Copy **arapi70.jar** and **arutil70.jar** from the BMC Remedy Action Request System installation directory to the **<HP Release Control installation directory>\tomcat\lib** directory.

    d Copy all the Windows library files (***.dll**) from the BMC Remedy Action Request System installation directory to the **<HP Release Control installation directory>\apps\ccm\WEB-INF\os_lib\win32** directory on the HP Release Control server machine.

3 Start the HP Release Control service.

Stage 4: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the **Integrations > Service Desk Adapters** node. The node includes the new service desk configuration files. Each configuration file is displayed in the right pane in a separate tab. For example:

3 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

4 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

Note: To modify your service desk settings after the initial configuration, see the section about advanced service desk configuration in the *HP Release Control User Guide*.

Configuring HP Service Desk Integration

This task describes how to configure HP Service Desk as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" below

➤ "Stage 3: Copy HP Service Desk Files to HP Release Control" on page 48

➤ "Stage 4: Apply Configuration Changes" on page 49

Stage 1: Prerequisites

Verify the following information, which you will need during this configuration process:

✔	Required Information
	HP Service Desk server name and port
	HP Service Desk user name and password

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```

For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.
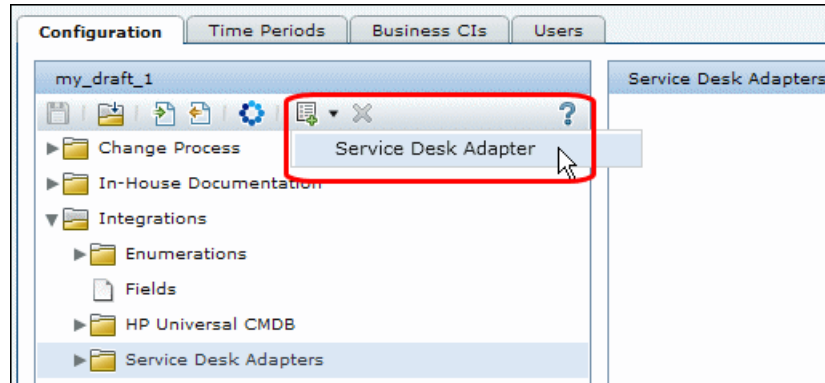
Stage 3: Copy HP Service Desk Files to HP Release Control

To connect to the BMC Remedy Action Request System service desk application, you must first ensure that certain BMC Remedy Action Request System files are accessible to the HP Release Control server.

1 Stop the HP Release Control service:

    a From the Windows menu, select **Start > Run** and type **services.msc**.

    b In Services window, select **HP ReleaseControl 5.00 <server name>** and click **Stop Service**.

2 Copy the **web-api.jar** file from the HP Service Desk **servicepages\webapps\ sd-sp45\WEB-INF\lib** directory and paste it into the **<HP Release Control installation directory>\tomcat\lib** directory. Start the HP Release Control service.
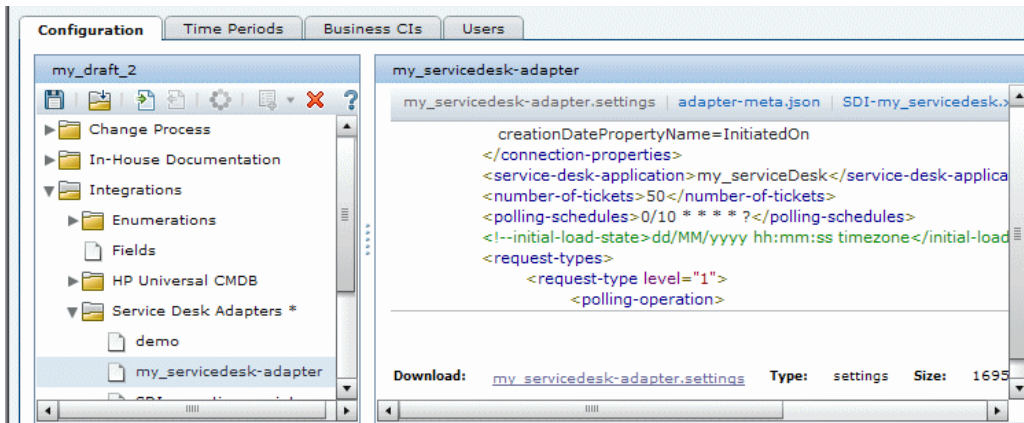
3 Start the HP Release Control service.

Stage 4: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the **Integrations** > **Service Desk Adapters** node. The node includes the new service desk configuration files. Each configuration file is displayed in the right pane in a separate tab. For example:

3 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

4 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

Note: To modify your service desk settings after the initial configuration, see the section about advanced service desk configuration in the *HP Release Control User Guide*.

Configuring a Database as a Service Desk

This task describes how to configure a database as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" on page 52

➤ "Stage 3: Apply Configuration Changes" on page 53

Stage 1: Prerequisites

1 Depending on which database you are using, verify the following connection information and database properties that you will need during this configuration process:

➤ **For Oracle databases**

✔	Required Information	Description
	Oracle SID, DB host name, port, user name, and password	Database connection properties
	change id column name	The name of the column in the result set that contains the ID field value.

✔	Required Information	Description
	created date query	The SQL query that returns the change request set according to the requests' **creation-date** field values.
	created date field result column name	The name of the column in the result set that contains the **creation-date** field value.
	created date column type	One of the following values: **time**, **timestamp**, **date**, **milliseconds**, or **seconds**
	Is the created date query a stored procedure?	If yes, what are the input and output parameter names and the catalog name?
	last updated query	The SQL query that returns the change request set according to the requests' **last-update** field values.
	last updated field result column name	The name of the column in the result set that contains the **last-update** field value.
	last updated column type	One of the following values: **time**, **timestamp**, **date**, **milliseconds**, or **seconds**
	Is the last updated query a stored procedure?	If yes, what are the input and output parameter names?

➤ **For MS-SQL databases**

✔	Required Information	Description
	DB name, DB host name, port, user name, and password	Database connection properties
	change id column name	The name of the column in the result set that contains the ID field value.
	created date query	The SQL query that returns the change request set according to the requests' **creation-date** field values.
	created date field result column name	The name of the column in the result set that contains the **creation-date** field value.

✔	Required Information	Description
	created date column type	One of the following values: **time**, **timestamp**, **date**, **milliseconds**, or **seconds**
	Is the created date query a stored procedure?	If yes, what is the input parameter name?
	last updated query	The SQL query that returns the change request set according to the requests' **last-update** field values.
	last updated field result column name	The name of the column in the result set that contains the **last-update** field value.
	last updated column type	One of the following values: **time**, **timestamp**, **date**, **milliseconds**, or **seconds**
	Is the last updated query a stored procedure?	If yes, what is the input parameter name?

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```
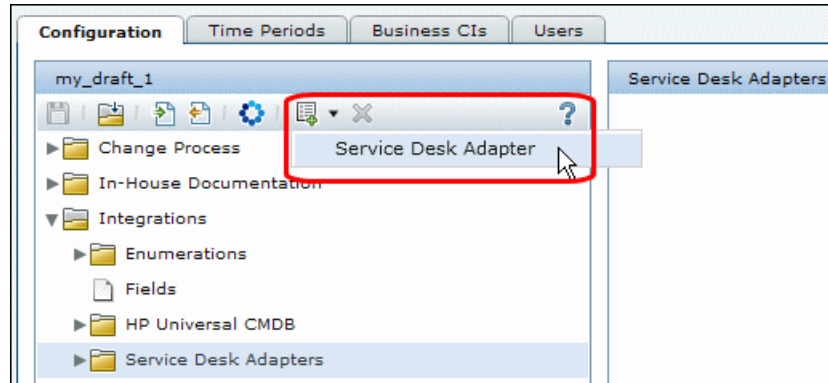
For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.
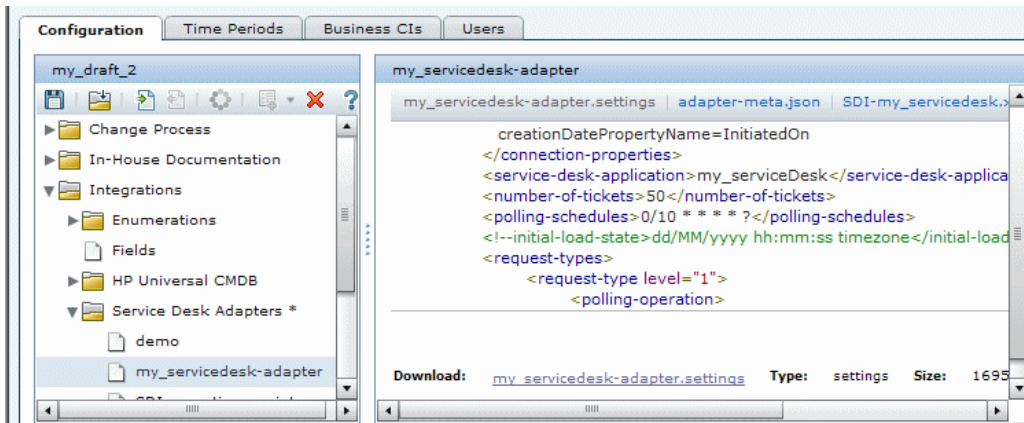
Stage 3: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the **Integrations** > **Service Desk Adapters** node. The node includes the new service desk configuration files. Each configuration file is displayed in the right pane in a separate tab. For example:

3 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

4 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

Note: To modify your service desk settings after the initial configuration, see the section about advanced service desk configuration in the *HP Release Control User Guide*.

Configuring an XML File as a Service Desk

This task describes how to configure and XML file as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" below

➤ "Stage 3: Apply Configuration Changes" on page 55

Stage 1: Prerequisites

1 Verify the folder in which XML files will be placed and retrieved by HP Release Control. You need this information for the configuration utility that you will run in the next stage.

2 Ensure that the HP Release Control user has read permissions to the directory in which the service desk application requests are placed in XML file format.

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```
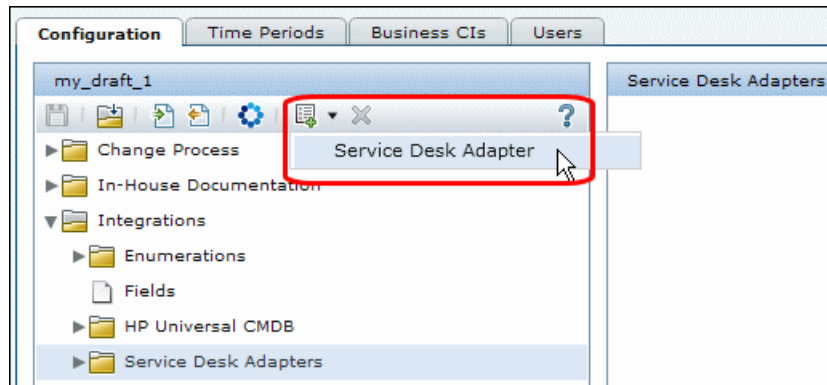
For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.
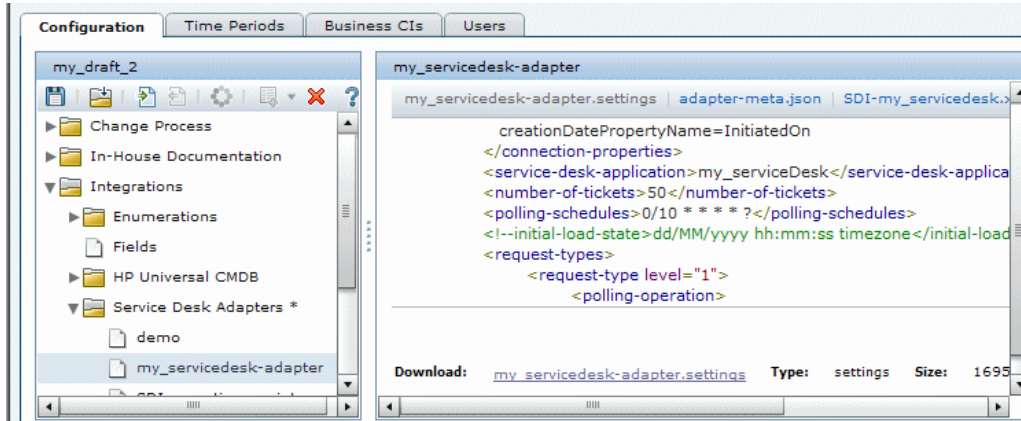
Stage 3: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the
Integrations > **Service Desk Adapters** node. The node includes the new
service desk configuration files. Each configuration file is displayed in the
right pane in a separate tab. For example:

3 Save a draft of your configuration set. (See "Saving a Draft Configuration
Set" on page 60.)

4 When you are satisfied with your configuration changes, activate the
draft. (See "Activating Configuration Changes" on page 61.)

Note: To modify your service desk settings after the initial configuration,
see the section about advanced service desk configuration in the
HP Release Control User Guide.

Configuring HP Server Automation or HP Network Automation as Your Service Desk

This task describes how to configure <service desk> as your service desk and includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Run the Configuration Utility" below

➤ "Stage 3: Apply Configuration Changes" on page 58

Stage 1: Prerequisites

1 Verify the following information, which you will need during this configuration process:

✔	Required Information
	For HP Server Automation: server name, user name, and password
	For HP Network Automation: sever URL, user name, and password

Stage 2: Run the Configuration Utility

From the command line, run the following command:

```
<HP Release Control installation directory>\bin\SdiConfigurer.bat
```
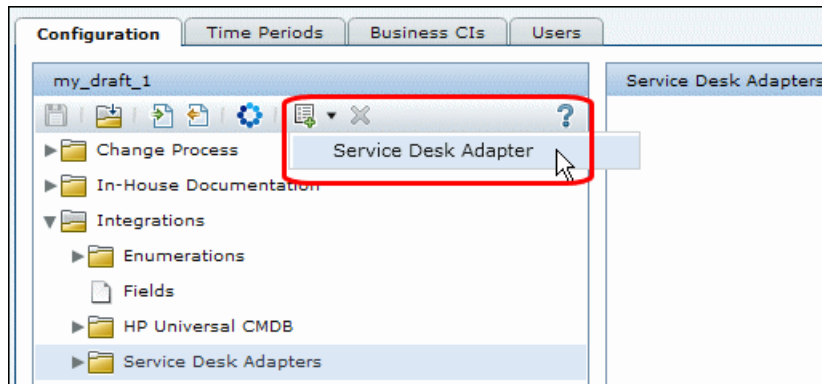
For each question, type your selection and press ENTER. (Refer to the information you verified at the beginning of the Prerequisites section.) Where relevant, the default selection appears in square brackets at the end of the question.

Note: If you press ENTER without typing anything, the default answer is automatically selected.

Based on your selections, the configuration utility creates new configuration files, including a .zip file. To apply the configuration settings to HP Release Control, you upload the .zip file as outlined in the following step.
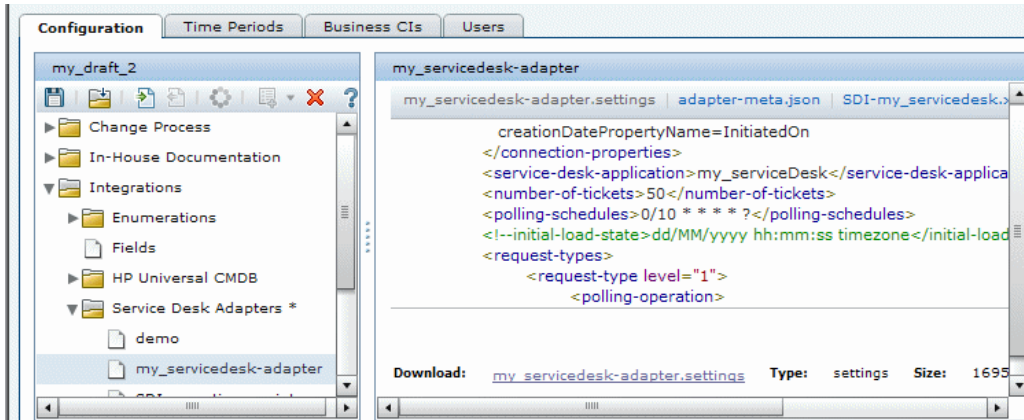
Stage 3: Apply Configuration Changes

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Service Desk Adapters,** click the arrow next to the **Add configuration to configuration set** button, and choose **Service Desk Adapter.**

2 In the Select file to upload dialog box, go to **<HP Release Control installation directory>\bin\result** and open **<adapter_name>.zip.**

A new node (with the name of the adapter) is added under the **Integrations** > **Service Desk Adapters** node. The node includes the new service desk configuration files. Each configuration file is displayed in the right pane in a separate tab. For example:

3 Save a draft of your configuration set. (See "Saving a Draft Configuration Set" on page 60.)

4 When you are satisfied with your configuration changes, activate the draft. (See "Activating Configuration Changes" on page 61.)

Note: To modify your service desk settings after the initial configuration, see the section about advanced service desk configuration in the *HP Release Control User Guide*.

Working with HP Release Control Configuration Settings

The Configuration tab in the Administrator module enables you to define the configuration settings needed to set up your environment. This section describes the following common tasks in the Configuration tab. These tasks are referred to during the configuration process.

➤ "Modifying Configuration Files in the Configuration Tab" on page 60

Modifying Configuration Files in the Configuration Tab

Certain configuration settings are defined in configuration files (for example, scripts and XML files) that are available in the Configuration tab. This task describes how to modify these files.

To modify configuration files:

1 In HP Release Control, go to **Module** > **Administrator** > **Configuration** tab and select the relevant node that includes the configuration file you want to modify.

2 In the right pane, click **Download: <file>** and export the file to your local directory using the browse dialog box that opens.

3 After making the required modifications to the file in your local directory, click **Upload file** to import the modified file from your local directory to the HP Release Control system.

Saving a Draft Configuration Set

A new configuration set is initially saved as a draft. A draft is a configuration set that has not yet been activated. Only after a draft is activated, are the new configuration properties applied to HP Release Control. (See "Activating Configuration Changes" on page 61.)

To save a draft configuration set:

1 Select **Module** > **Administrator** > **Configuration** tab and make the required configuration changes.

2 In the left pane, click the **Save current editable configuration set** button to open the Save as Draft dialog box and save the modified configuration set as a draft.

3 In the **Draft name** box, enter the name of the draft and click **Save**.

Activating Configuration Changes

This section explains how to activate a draft configuration set and apply the configuration properties to HP Release Control.

To apply configuration changes

1 Select **Module** > **Administrator** > **Configuration** tab. In the left pane, click **Open Configuration Set** button to open the Open Configuration Set dialog box.

2 Select the **Drafts** button to display only the existing drafts.

3 Select the required draft and click **Open**. The name of the currently selected configuration set appears at the top of the left pane.

4 In the left pane, click the **Activate current configuration set** button to activate the selected draft and apply the new configuration properties to HP Release Control.

2

Upgrading HP Release Control

This chapter provides information on how to upgrade from HP Release Control **4.12 and later** to version **5.00**.

To upgrade to version 5.00 from versions earlier than 4.12:

➤ Upgrade to version 4.12 according to the instructions in the *HP Release Control 4.12 Deployment Guide*.

➤ Upgrade from version 4.12 to version 5.00 by following the instructions in this chapter.

The upgrade process includes the following stages:

➤ "Stage 1: Prerequisites" below

➤ "Stage 2: Install and Upgrade HP Release Control" on page 65

➤ "Stage 3: Upgrade Service Desk Adapter" on page 66

➤ "Stage 4: Post Upgrade Recommendations" on page 76

Stage 1: Prerequisites

1 Make sure that the change request queue is empty as follows:

a In the **<old HP Release Control installation directory>\conf** directory, open the relevant service desk adapter configuration files (**<service desk>-adapter.settings**). For example, if you are working with HP Service Manager, the relevant file is **servicemanager-ws-adapter.settings**.

b In the adapter configuration file, switch the adapter into init-mode as follows:

➤ Locate the following line:

```
<!--initial-load-state>1/20/2000 00:00:00 PST</initial-load-state-->
```

➤ Uncomment the line and modify the date/time as follows:

```
<initial-load-state>[last polling time]</initial-load-state>
```

Where [**last polling time**] is any time before the last time HP Release Control polled the service desk. Polling occurs every thirty seconds by default.

It is recommended to set the last polling time to a few hours earlier than the current time. For example, if today's date is 20 January 2010, set the last polling time as follows:

```
<initial-load-state>1/20/2010 00:00:00 PST</initial-load-state>
```

c Restart HP Release Control and allow it to process all the change requests still in the queue.

d Make sure the queue is empty using the Queue Manager utility located in **<old HP Release Control installation directory>\bin**.

To view a list of change requests in the queue, run the following command:

```
QueueManager.bat -l
```

If there are no changes in the queue, you can proceed. If there are still changes in the queue, wait until they are processed or use the Queue Manager utility to delete them.

For more information about using the Queue Manager utility, see the *HP Release Control User Guide*.

2 Stop the HP Release Control service.

3 If you were using a Web server (Apache or IIS) with HP Release Control, remove the Web server configuration using the Web server configurer utility. To remove it, run the following command:

```
<old HP Release Control installation directory>\bin\WebServerConfigurer.bat
remove-config
```

Note: After you install the new version of HP Release Control, if you still want to work with a Web server, configure it using the Web server configurer utility in the new installation. For more information, refer to the utilities section in the *HP Release Control User Guide*.

---

4 Back up the database to protect your data in case of an error during the upgrade procedure.

Stage 2: Install and Upgrade HP Release Control

1 Install HP Release Control version 5.00 (see "Installing HP Release Control" on page 18).

Before you run the installation, review the pre-installation information (see "Before You Install" on page 13).

2 If you were using encrypted passwords in your HP Release Control configuration (for example, the database password), copy (and overwrite) the contents of **<old HP Release Control installation directory>\security** to **<HP Release Control 5.00 installation directory>\security.**

3 Configure the database that you want to use with the upgraded version of HP Release Control. Use the Database Configuration Wizard as described in "Configuring the Database or User Schema" on page 19.

4 From the **<HP Release Control 5.00 installation directory>\bin** directory, run **Upgrade.bat** to perform the upgrade. When prompted, enter the full path of the old HP Release Control installation (for example, **C:\HP\RC412**).

5 If you made any changes to the log levels in the **ccmlog4j.properties** file of your old installation, manually make the same changes again in the new **ccmlog4j.properties** file and the **cmdblog4j.properties** file.

Stage 3: Upgrade Service Desk Adapter

Note: You need to perform the steps in this stage for each service desk adapter that you were using with your old version of HP Release Control.

---

1 Return the adapter to polling mode as follows:

a In the **<old HP Release Control installation directory>\conf** directory, open the relevant service desk adapter configuration files (**<service desk>-adapter.settings**).

For example, if you are working with HP Service Manager, the relevant file is **servicemanager-ws-adapter.settings**.

b In the adapter configuration file, comment out the following line:

```
<initial-load-state>[last polling time]</initial-load-state>
```

2 From the **<HP Release Control 5.00 installation directory>\bin** directory, run **UpgradeSdi.bat**.

➤ When prompted, enter the full path of the old HP Release Control installation (for example, **C:\HP\RC412**) and select the service desk adapter that you want to upgrade.

➤ If you are using HP Service Manager/Center, you will be prompted for the version number.

3 If you are using Remedy as your service desk and you manually added .jar files to the **<old HP Release Control Installation directory>\tomcat\webapps\ccm\WEB-INF\lib** directory, copy the added files to **<HP Release Control 5.00 Installation directory>\apps\ccm\WEB-INF\os_lib**.

4 Start the HP Release Control service and log on to HP Release Control (see "Launching HP Release Control" on page 21).

 5 Select **Module** > **Administrator** > **Configuration** tab. In the left pane, click the **Open Configuration Set** button to open the Open Configuration Set dialog box.

 6 Select the **Drafts** button to display only the existing drafts.

 7 Select the newly created draft and click **Open**. The name of the currently selected configuration set appears at the top of the left pane.

 Next Step:

 ➤ If you are working with HP Service Manager/Center, continue below.

 ➤ For all other service desks, continue with step 10 on page 76.

---

 8 Remove the Action Items filter heading from the Reports template.

   a Select **Module** > **Administrator** > **Configuration** tab > **Modules** > **Analysis** > **Reports** > **Changes Report - HTML and PDF template**

   b Click **Download: grid.changes-report.jrxml** and export the file to your local directory using the browse dialog box that opens. Open the file on your local directory.

   c Locate both occurences of the following string:

```
<textFieldExpression class="java.lang.String"><![CDATA["Change Requests:
<style isBold=\"true\">" + $P{CHANGE_FILTER} + "</style>  Action items: <style
isBold=\"true\">" + $P{COLLABORATION_FILTER} + "</style>"]]></
textFieldExpression>
```

   d In both places, replace the above string with the following string:

```
<textFieldExpression class="java.lang.String"><![CDATA["Filter: <style
isBold=\"true\">" + $P{CHANGE_FILTER} + "</style>"]]></textFieldExpression>
```

   e Save the file.

  f Select **Module** > **Administrator** > **Configuration** tab > **Modules** > **Analysis** > **Reports** > **Changes Report - HTML and PDF template**. In the right pane, click **Upload file** to import the modified file from your local directory to the HP Release Control system.

9 For HP Service Manager/Center only: Change the operations settings in the service desk adapter file.

Caution: During this step, you need to copy and paste large amounts of text. When pasting the text, ensure that strings in quotation marks (") start and end on the same line.

---

  a Select the **Integrations** > **Service Desk Adapters** > <**adapter name**> node and select the <**adapter name**>**-adapter.settings** file in the right pane.

  b Click **Download:** <**adapter name**>**-adapter.settings** and export the file to your local directory using the browse dialog box that opens. Open the file on your local directory.

  c In the <**request-type level**="**1**"> element, replace the <**operations**> element with the following text:

```
<operations>

   <operation name="approve">

      <operation-type>approveOperation</operation-type>

      <connector>

          <connector-type>ServiceManagerChangeApprove</
connector-type>

      </connector>

      <sender-properties>

          updateOperation=true

      </sender-properties>

   </operation>
```

```xml
<operation name="canApprove">
  <operation-type>alwaysCanApproveOperation</operation-type>
</operation>
<operation name="retract">
  <operation-type>retractOperation</operation-type>
  <connector>
    <connector-type>ServiceManagerChangeRetract</connector-type>
  </connector>
  <sender-properties>
    updateOperation=true
  </sender-properties>
</operation>
<operation name="canRetract">
  <operation-type>alwaysCanRetractOperation</operation-type>
</operation>
<operation name="reviewUpdate">
  <operation-type>reviewUpdateOperation</operation-type>
  <connector>
    <connector-type>ServiceManagerChangeUpdate</connector-type>
    <properties>
      scriptName=updateOperations.js
      methodName=updateChangeReview
    </properties>
  </connector>
</operation>
```

```
<operation name="canUpdateReview">

    <operation-type>alwaysCanUpdateReviewOperation</
operation-type>

</operation>

<operation name="updatePlannedTimes">

    <operation-type>updatePlannedTimesOperation</operation-type>

    <connector>

        <connector-type>ServiceManagerChangeUpdate</
connector-type>

        <properties>

            scriptName=updateOperations.js

            methodName=updatePlannedTimes

        </properties>

    </connector>

</operation>

<operation name="canUpdatePlannedTimes">

    <operation-type>alwaysCanUpdatePlannedTimesOperation</
operation-type>

</operation>

<operation name="updateStatus">

    <operation-type>updateStatusOperation</operation-type>

    <properties>

        timeout=30

    </properties>

    <connector>

        <connector-type>ServiceManagerChangeUpdate</
connector-type>

        <properties>
```

```
            scriptName=updateOperations.js

            methodName=updateChangeStatus

        </properties>

    </connector>

</operation>

<operation name="canUpdateStatus">

    <operation-type>alwaysCanUpdateStatusOperation</
operation-type>

</operation>

<operation name="close">

    <operation-type>closeOperation</operation-type>

    <connector>

        <connector-type>ServiceManagerChangeClose</
connector-type>

        <properties>guarded=true</properties>

    </connector>

</operation>

<operation name="canClose">

     <operation-type>alwaysCanCloseOperation</operation-type>

</operation>


<!--operation name="updateAnalysisData">

    <operation-type>updateAnalysisDataOperation</operation-type>

    <properties>

        timeout=30

    </properties>

    <connector>
```

```
            <connector-type>ServiceManagerAnalysisChangeUpdate</
connector-type>
                <properties>

                    userName=falcon

                    password=

                    scriptName=updateOperations.js

                    methodName=updateChangeAnalysisData

                </properties>

            </connector>

        </operation-->

</operations>
```

d In the <**request-type level**="**2**"> element, replace the <**operations**> element with the following text:

```
<operations>

    <operation name="approve">

        <operation-type>approveOperation</operation-type>

        <connector>

            <connector-type>ServiceManagerTaskApprove</
connector-type>

        </connector>

        <sender-properties>

            updateOperation=true

        </sender-properties>

    </operation>

                <operation name="canApprove">

    <operation-type>alwaysCanApproveOperation</operation-type>

        </operation>
```

```xml
<operation name="retract">
    <operation-type>retractOperation</operation-type>
    <connector>
        <connector-type>ServiceManagerTaskRetract</connector-type>
    </connector>
    <sender-properties>
        updateOperation=true
    </sender-properties>
</operation>
<operation name="canRetract">
    <operation-type>alwaysCanRetractOperation</operation-type>
</operation>
<operation name="reviewUpdate">
    <operation-type>reviewUpdateOperation</operation-type>
    <connector>
        <connector-type>ServiceManagerTaskUpdate</connector-type>
        <properties>
            scriptName=updateOperations.js
            methodName=updateTaskReview
        </properties>
    </connector>
</operation>
<operation name="canUpdateReview">
    <operation-type>alwaysCanUpdateReviewOperation</operation-type>
</operation>
<operation name="updatePlannedTimes">
```

```
            <operation-type>updatePlannedTimesOperation</operation-type>
            <connector>
                <connector-type>ServiceManagerTaskUpdate</connector-type>
                <properties>
                    scriptName=updateOperations.js
                    methodName=updatePlannedTimes
                </properties>
            </connector>
        </operation>
        <operation name="canUpdatePlannedTimes">
            <operation-type>alwaysCanUpdatePlannedTimesOperation</
operation-type>
        </operation>
        <operation name="updateStatus">
            <operation-type>updateStatusOperation</operation-type>
            <properties>
                timeout=30
            </properties>
            <connector>
                <connector-type>ServiceManagerTaskUpdate</connector-type>
                <properties>
                    scriptName=updateOperations.js
                    methodName=updateTaskStatus
                </properties>
            </connector>
        </operation>
        <operation name="canUpdateStatus">
```

```
        <operation-type>alwaysCanUpdateStatusOperation</
operation-type>

    </operation>

    <operation name="close">

        <operation-type>closeOperation</operation-type>

        <connector>

            <connector-type>ServiceManagerTaskClose</connector-type>

            <properties>guarded=true</properties>

        </connector>

    </operation>

    <operation name="canClose">

         <operation-type>alwaysCanCloseOperation</operation-type>

    </operation>


    <!--operation name="updateAnalysisData">

        <operation-type>updateAnalysisDataOperation</operation-type>

        <properties>

            timeout=30

        </properties>

        <connector>

            <connector-type>ServiceManagerAnalysisTaskUpdate</
connector-type>

            <properties>

                userName=falcon

                password=

                scriptName=updateOperations.js

                methodName=updateTaskAnalysisData
```

```
                    </properties>

                  </connector>

                </operation-->

              </operations>
```

  e Save the file.

  f You can configure HP Release Control to update HP Service Manager with Analysis information. For details, see the relevant section in the HP Release Control User Guide.

  g In HP Release Control, select the <**adapter name**>-**adapter.settings** file in the right pane and click **Upload file** to import the modified file from your local directory to the HP Release Control system.

  h Save your changes to the draft.

10 In the left pane, click the **Activate current configuration set** ⚙ button to activate the selected draft and apply the new configuration properties to HP Release Control.

Stage 4: Post Upgrade Recommendations

1 Uninstall the old version of the product.

2 If you did not make any changes to the **change-flow.js** script of your old installation, it is recommended to upload the new **change-flow.js** script as follows:

  a In HP Release Control, select the **Module** > **Administrator** > **Configuration** tab > **Change Process** > **change flow script** node.

  b In the right pane, click **Upload file** and upload the **change-flow.js** script from <**HP Release Control 5.00 installation directory**>**examples****scripts** directory.

  c Save and activate the configuration changes (see "Working with HP Release Control Configuration Settings" on page 59).

3 If you have filters that include definitions for the **Calculated risk** criteria, the filters will still work but you are not able to edit the **Calculated risk** criteria using the default filter settings. To edit these filters:

a In HP Release Control, select **Module** > **Administrator** > **Configuration** tab > **Integrations** > **Fields**.

b In the **Available Fields** pane, select the **Analysis Data** > **calculated-risk** field.

c In the **Field Attributes** pane, in the **Filter Layout** tab, select the **show in filter** options.

d Save and activate the configuration changes (see "Working with HP Release Control Configuration Settings" on page 59).

e Log on to HP Release Control and edit your filters.

Note:

➤ It is recommend to change the filter definition and to use the new **Risk severity** criteria in place of the **Calculated risk** criteria.

➤ After you edit the filter, it is recommended to return to the Fields pane and clear the show filter options for the **calculated-risk** field.

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