Process Designer Content Pack

for supported Windows® and UNIX® operating systems

Release Notes

Software version: 9.30.2 / January 2013 (Updated: March 19, 2013)

This document provides an overview of the Process Designer Content Pack 9.30.2 (PD CP3). It contains important information not included in the manuals or in online help.

Documentation Updates

The first page of this release notes document contains the following identifying information:

- Version number, which indicates the software version.
- Publish date, which changes each time the document is updated.

To check for recent updates or to verify that you are using the most recent edition, visit http://www.hp.com/go/livenetwork and navigate to the Service Manager Standard Content area.

Note: To view files in PDF format (`*.pdf`), Adobe Acrobat Reader must be installed on your system. To download Adobe Acrobat Reader, go to the following web site:
http://www.adobe.com/

In This Version

Service Manager (SM) Process Designer Content Pack 9.30.2 includes some enhancements and a number of fixes for problems introduced in previous Process Designer Content Pack releases.

Process Designer Content Pack 9.30.2 provides the following enhancements in addition to those in Process Designer Content Pack 9.30.0 and 9.30.1:

- Support of applying change model to existing change records. In addition, you can configure whether or not this "Apply Change Model" option is available for a specific workflow phase.
- Task planner (was called "task editor" before this release) has been enhanced:
  - Support of adding conditions for task creation by using the Condition Editor embedded in the task planner in change model.
  - Support of planning mandatory tasks in the task planner in change model.
  - Task planner now is also available from change records for you to view or plan change tasks.
- The Service Catalog connector "Open a Change" is enhanced to support the use of change model to open a change record.
- Support of configurable filtering of change models by using script function.
- Support of configuring custom fields to be copied from a change model to a change record by using link file.
- You can now use Mass Cancel to cancel all the opened tasks for a change record.
- Security improvement: some mappings between the old profiles and the new Process Designer security rights are corrected

For more information about these enhancements, see the *Process Designer Content Pack 9.30.2 Administrator's Guide.*

For a list of fixes and known issues included in this release, see Fixes and Known Problems, Limitations, and Workarounds.

For information on the prerequisites and installation instructions of this content pack, see Installation Notes.

Fixes

This content pack release fixes the following defects in Change Management and Documentation.

Change Management

Global ID	Problem	Solution
QCCR1E71874	In a Service Manager deployment that includes Process Designer, a security role that is set to "When assigned to workgroup" does not work as expected. Users with a correct role and sufficient rights cannot update a change in the correct Assignment Groups.	Now, a security role that is set to "When assigned to workgroup" works as expected. Users with a correct role and sufficient rights can update a change in the correct Assignment Groups.
QCCR1E72733	The Template functionality in Change Management does not respect the selected Change Model or change category of the change to which it is applied. This results in invalid changes when the Process Designer Content Pack is installed.	A validation for subcategory has been added so that invalid subcategories are not saved.
QCCR1E72793	In the Change Model form, there is a Change Template array. The functionality of that array is not described in supporting documentation. If multiple templates are populated in the array, when that model is selected when opening a change, the last template in the array is automatically applied to the new change. There is no apparent method to choose one of the templates listed in the changeModel. If, after the new change appears, the user selects "Apply Templates", all change templates are listed, whether or not they are listed in the change model.	This behavior is by design. When you open a new change from a change model with multiple templates specified, Service Manager automatically applies all the templates in the order listed in the change model by merging their field values. Updated the Process Designer Content Pack 3 Administrator Guide (the "How to create a change model" section).

Global ID	Problem	Solution
QCCR1E73366	When a ticket with an SLA ID and an SLO objective is opened, an SLA refresh schedule record is created. When an Incident is closed, the SLA state change schedule record deletes and then recreates a sla.refresh.active schedule record. Additionally, the sla.refresh.active schedule record always recreates itself even after it is processed. These behaviors result in thousands of wasteful processes schedule records in a system and create resource and performance issues in the SLA background process.	If the incident is closed, the SLA schedule is not necessary.
QCCR1E73671	In SM9.30p3 with Process Designer, the cm3r Object record refers to an obsolete variable.	The Global Variable $G.cm3r.environment now takes the cm3profile as the data structure to store secRights setting.
QCCR1E74050	After applying the Process Designer Content Pack, using the "**Change Category**" menu option in a Change record can result in error messages and invalid Category combinations.	When you use the "Change Category" menu option in a Change record and the Change enters a new workflow phase, a different validation rule is applied. Previously, the Change was reverted to the previous phase if the validation rule failed. This behavior caused a mismatch between the category and phase. Now, the change is not reverted. Instead, if the validation fails, the Change phase and workflow is modified but not committed to the database. In this case, the following behaviors apply: • If the user leaves the Change, the system reverts to the original Change. • If the user enters the fields that are required by the new phase, the user can save the Change and the Change is switched successfully to the new category.
QCCR1E74162	When creating a Knowledge Document by using the 'external' doctype, the Preview button does not show the contents of the file being used. Instead, the HTML viewer is blank.	Once an external type of Knowledge Document has been submitted or published, clicking the Preview button brings up a dialog, asking if the user wants to save the document in order to continue to preview. Once the user clicks **OK**, the document is saved, and the user can click the **Preview** button to preview it.

Global ID	Problem	Solution
QCCR1E74227	You cannot configure override permissions for operators with the new Process Designer Content Patch installed and security roles. Prior to the Content Patch, override permissions for operators would be configured in the change profiles, which are no longer used.	The "change.view_approve" display option was modified and "admin in $L.env" is used instead of "approve.override in $L.env." These changes grant the admin user the approval.override permission.
QCCR1E74283	Prior to applying Process Designer Content Pack, users could define a rule so that a script is called only the first time the first phase of a Change is entered. Previously, Service Manager displayed the Change form and did not re-display the form as part of the Save process. Nor does the Change form display ever again once the change is saved, or if a change in the first phase was displayed. Administrators used the old Phase-based open script to prompt for required fields when opening a Change, but this no longer works correctly after you apply the Content Pack.	Conditional sub tabs on the Rule Sets tab for a Change Workflow work as expected after you apply the Process Designer Content Pack.
QCCR1E74493	Change Management Alerts that are defined against the Approval Status are not recalculated when an approved Change is retracted.	Change Management Alerts that are defined against the Approval Status are recalculated following approval retraction.
QCCR1E75066	After saving a form by using the im.save process, the cursor does return to its previous location when the user clicks Save. **Note**: This behavior only occurs if the cursor was previously in a table widget. All other fields work as expected.	During the refresh process, the cursor is repositioned back to the original widget before the form was submitted.
QCCR1E76539	There is no "**Mass Update**" menu in Payment Queue. **Note**: The issue also exists in the Change Queue and the Approval Queue.	Added the db.complex and db.template values in cm3.setup.environment to make it read from the secRights expert setting.

Global ID	Problem	Solution
QCCR1E76957	Approval delegation RAD does not match Process Designer Content Pack table usage. When the user selects the Change Management Module for delegating approvals, all they see is their own ID in the screen wizard-approvaldel.show.groups.	The Change Management approval group for the new security model is now defined in the **ChM Membership** section under the **Groups** tab in the operator record, which is related to a myGroup record with the same name as operator. Therefore, using the $G.cm3r.environment as the approval group data source will be the same result as get approval group from myGroup table.
QCCR1E77450	Cannot generate sloresponse record on Change module.	The correct SLO should be generated for this change record in the sloresponse table and also displayed in the Response Time Objectives area of this change.
QCCR1E77433	Suspend states that are defined in an SLO are not suspended in a cm3r ticket after Process Designer Content Pack 9.30.1 is installed.	The suspend states that are defined in an SLO are suspended as expected.
QCCR1E77825	An Error record appears in the schedule table when closing an Incident which is related to an Interaction. The $allow.save equals false statement prevented the Incident from being updated	Changed the background status to set $allow.save=true and therefore to pass the validation.
QCCR1E78741	There is a conflict between AP4 and PD CP2: The CLIP downtime cannot be withdrawn for a CI if they change the phase from one phase after the final approval phase to a phase that is prior to the final approval phase.	The withdrawn CI outage confirmation is displayed as expected.
QCCR1E78924	With the Process Designer Content Pack installed, viewing a Change record produces error messages if the system is not also licensed for Problem or Service Management.	Change records can now display without Problem or Service Management license.
QCCR1E79572	Automatic Approval no longer works after migrating from the classical Change Management to Process Designer.	Previous to Process Designer, the approval group that a user belongs to is passed to generate the approval. However, in Process Designer, the group is not passed and the auto approval does not work. This fix allows the approval group to be passed as a parameter and allows the auto-approval to function as expected.

Global ID	Problem	Solution
QCCR1E79820	When Process Designer is configured so that when a user reverts a document from KM and has not provided feedback, the working copy is not deleted. However, Process Designer's handling of failed validation returns from the "Call a Process" action type presents some issues. Specifically, if you set $L.exit to "bad.val" or "cancel" a bad validation situation should occur.and the post action should not run. However, the action is still executed.	The failed validation should halt the revert operation.
QCCR1E80238	When opening a new change, not all change modules are displayed for selection. Instead, only those for the "system administrator" or "<all>" security roles are available.	The change model can be selected only if the user has the corresponding role.
QCCR1E84027	When you try to save an operator record with a NULL secRole value, the system sets secRole to "default". For normal operators, this is expected. However, for template operators, it causes all other operators that use that template to also acquire "default" secRole, even if they already have a security role with more privileges, such as system administrator.	Now, the template operator role will be added into the operator security role list, and these security roles will be merged.
QCCR1E87823	"Change.Manager" can still update a change record after their "Update" secRight was set to "Never".	"Change.Manager" cannot update a change record after their "Update" secRight was set to "Never". **Known issue**: This fix will only take effect for the workflows that have not been defined before the upgrade. If the workflow is already in the system before the upgrade, this issue will still occur. To work around this, you can manually add $L.tableAccess.update=true in the expression defined in Form Edit Condition.
QCCR1E89367	An upgrade to PDCP2 fails because the "Updating user languages" procedure from the sm.patchrel.wizard wizard causes a hang.	Update Application Patch Manager to remove the "Updating user languages" procedure from the sm.patchrel.wizard wizard.
QCCR1E89449	Add a check to the APM tool to verify the value of the **`sessiontimeout`** and **`ir_disable`** parameters in `sm.ini`.	A new notes wizard page is added in the first step when you apply a patch. This page informs the user to check the related settings.

Documentation

Global ID	Problem	Solution
QCCR1E89359	Before applying a content release, you need to make some changes on the SM configuration files. The information for these configuration updates should be added to the PDCP documentation.	The Application Patch Manager guide has been updated to include the information of updating the configuration files (`sm.ini` and `sm.cfg`) before applying the content release.

Known Problems, Limitations, and Workarounds

This software release has the following known issues.

Global ID	Known Issue	Workaround
QCCR1E72897	Group approvals are not working. The approver is unable to approve/deny/retract a change ticket from the SOAP UI, even if the approver is part of the assignment group.	No workaround is available at this time.
QCCR1E72898	Unable to approve task tickets from the SOAP UI for most of the categories.	No workaround is available at this time.
QCCR1E73962	After approving a change with open tasks, it does not transition to the next phase.	This is expected if the tasks are required to close before proceeding. Tasks should not be added to approval phases. Approval steps transition automatically to the next phase when the approvals are complete. If a task is set to close on the approval phase and the tasks are still open, the workflow will not transition. Do not place tasks on approval phases either manually or via change models.
QCCR1E74330	The integration script for PPM does not work in the "cm.update.save" process.	Additional steps are required for integrating PPM Center Tasks with HP Service Manager RFCs when the Process Designer Content Pack is applied. Follow the steps below to configure the integration: 1. Follow the instructions in the Integrating PPM Center Tasks with HP service Manager RFCs section of the HP Solution Integrations Guide provided by PPM to complete all configuration tasks for PPM Center and Service Manager. 2 Modify the Service Manager processes that will call the PPM Center Web services to update the RFC status and task status. a Add the following code to the Final JavaScript tab of the change.update.save process: **`system.library.HPPPMSMIntegration.integratePPM();`** The standard Save, Close, Next Phase and Reopen actions for RFCs will invoke this process. b Add the same line of code to other processes to which you have added any other actions used to update changes (through tailoring your Service Manager instance).

Global ID	Known Issue	Workaround
QCCR1E74459	The Display options in Change workflows will not be present after being converted to Process Designer workflows. For example, Change Categories such as Hardware and Software before applying the Process Designer Content Pack had a Reject option which was implemented as a hard-coded Display option.	The Reject option is very similar to the Abandon functionality in the Standard and Normal workflows. To implement the Reject functionality for upgraded workflows: 1. Create a new phase called Abandoned and add a transition from every phase you wish to abandon. 2. Name the transition "Reject" or "Abandon" as desired. 3. Make sure the "Records in this phase are active" checkbox is unchecked on the Abandoned phase. 4. Add the Rule Set "chm.closure.wizard" to every transition to the Abandoned phase which will ask for the Closure Code and Comments. You may refer to the Normal and Standard workflows for working examples.
QCCR1E75041	The embedded Change Calendar section in the change ticket is not displaying any change tickets after applying Process Designer Content Pack.	This is caused by the Release Control (RC) adapter upgrade issue. In Process Designer Content Pack, several new fields have been introduced in the changemanagement.wsdl, which are part of the RC adapter. If you are still using the adapter generated based on the SM9.30 GA version, this issue will occur. To resolve this issue, update the RC adapter after applying this content pack. **Note**: Make a backup of your script if you have done any customization in the old adapter.
QCCR1E88645	For the change records in the Hardware category, after you change the phase from “Evaluation & Change Closure” to "Change Assessment & Planning", the “Evaluation & Change Closure” phase form is still showing in the record, instead of the "Change Assessment & Planning" phase form.	After you change the phase from “Evaluation & Change Closure” to "Change Assessment & Planning", click **Save & Exit**, and then reopen the record to view the form.

Global ID	Known Issue	Workaround

QCCR1E92099	Errors occur if a conditional task contains a type other than **CurrentRecord**, **RAD Expression**, and **Variable** in the condition expressions, such as **Category**, **Object**, and so on.
	
	The following are some examples of the error messages:
	`Cannot evaluate expression (change.openPlanTasks,refresh.waiting.tasks.status)`
	
	`Bad arg(1) oper ; (change.openPlanTasks,refresh.waiting.tasks.status)`
	
	`Cannot evaluate expression (change.openPlanTasks,refresh.waiting.tasks.status)`
		No workaround is available. To avoid the errors, do not use the following options in the condition editor when you create a conditional task:
		Category, **Object**, **Phase**, **SavedRecord**, and **Security**.

QCCR1E92143	If you define a conditional task using the “StartsWith” operator for an array field such as **Description**, this condition will not work and the task will be created even the “StartsWith” condition is not met.	Use "=" instead of "StartsWith" for array fields, and it works as "Contains".
QCCR1E91657	The status of the change tasks in legacy categories does not match the new PD task status.	To work around this issue, follow these steps to use the Generic Task workflow for the legacy categories: 1. Search and locate the task categories that you need to update by navigating to **Change Management** > **Configuration** >**Task Categories**. 2. If the **Workflow** field is not "Generic Task", set it as “Generic Task”. 3. Click **Save**.
QCCR1E91661	Change tasks in legacy categories still appear in the “View Opened Tasks” list even they have already been cancelled.	To work around this issue, follow these steps to use the Generic Task workflow for the legacy categories: 1. Search and locate the task categories that you need to update by navigating to **Change Management** > **Configuration** >**Task Categories**. 2. If the **Workflow** field is not "Generic Task", set it as “Generic Task”. 3. Click **Save**.

Global ID	Known Issue	Workaround
QCCR1E92056	Change tasks in legacy categories will not automatically move to the closed phase when you perform a Mass Cancel.	To work around this issue, follow these steps to use the Generic Task workflow for the legacy categories: 1. Search and locate the task categories that you need to update by navigating to **Change Management** > **Configuration** >**Task Categories**. 2. If the **Workflow** field is not "Generic Task", set it as “Generic Task”. 3. Click **Save**.
QCCR1E92271	For change tasks using legacy workflows, the succeeding task is not activated even the task it depends on is already closed.	To work around this issue, follow these steps to use the Generic Task workflow for the legacy categories: 1. Search and locate the task categories that you need to update by navigating to **Change Management** > **Configuration** >**Task Categories**. 2. If the **Workflow** field is not "Generic Task", set it as “Generic Task”. 3. Click **Save**.

Installation Notes

Prerequisites

This content pack must be applied on a Service Manager system with:

- ✓ 9.31p1_HF-PDCP3 Server hotfix (RTE)
- ✓ 9.31p1_HF-PDCP3 Web tier / Windows client hotfix

  Note:

  — To obtain the hotfix package, contact your HP Support. To install sever update, Web tier, and Windows client, refer to the *Installation Notes* section in the 9.31p1 release notes.

  — The 9.31p1_HF-PDCP3 hotfix does not contain the fixes introduced in 9.31p1_HF1.

Process Designer Content Pack 9.30.2 is compatible with following application, application patch and content pack:

- ✓ 9.31 applications

  Note:

  — Although this content pack is also compatible with some other applications (that is, 9.30, 9.30 ap1, 9.30 ap2, and 9.30 ap3), the recommendation is to upgrade to 9.31 applications before applying this content pack. If you apply this content pack on top of any applications prior to 9.31and later you want to upgrade to 9.31 applications, you will encounter conflicts and you will need to reconcile them manually.

  — 9.31 applications can be downloaded from http://support.openview.hp.com/selfsolve/patches.

Recommended Installation Sequences

The following are recommended installation sequences for different combinations of the SM 9.30 content packs, the SM 9.31 applications, and the Process Designer Content Pack 9.30.2.

Installation Sequences
1. SM 9.31 applications 2. Process Designer Content Pack 9.30.2
1. HTML Email 2. SM 9.31 applications 3. Process Designer Content Pack 9.30.2
1. Survey Integration 2. HTML Email 3. SM 9.31 applications 4. Process Designer Content Pack 9.30.2

Note: If you have already installed UCMDB Content Pack, the installation of 9.31 applications and Process Designer Content Pack 9.30.2 does not impact the functionality of UCMDB Integration; if you have not installed UCMDB Content Pack and you plan to use UCMDB Integration, no need to install UCMDB Content Pack separately as it is included in 9.31 applications.

Installation Steps

1. Download the installation files.
    a) Go to HP Live Network at http://www.hp.com/go/livenetwork.
    b) Navigate to **Home** > **Service Manager > Content**.
    c) Follow the link to **Process Designer Content Packs for Service Manager** and then go to the **Content** tab.
    d) Locate the **9.30.2** folder where you will find several documents and the installation file for Process Designer Content Pack 9.30.2.
    e) Download the installation file **PD3-9.30.049-contentpatchrel.zip** which contains the necessary files for step 4 below.
2. Download the **Applications Patch Manager Guide for Content Releases** located in the same location as Step 1.
3. On the target Service Manager system, make the following changes:
    — Increase the size of field **id** in table **RuleSet** from 40 to 80.

    This is required to prevent errors while cloning workflows. Some of the ones provided in the Content Pack have long Rule Set names and the storage can be exceeded if a long prefix is chosen upon cloning.

    — Increase the size of field **roleArea** in table **secRights** from 60 to 90.

    This is required to prevent failures installing the Content Pack.

    To increase the size of a field (database column):

    a Go to **Tailoring** > **Database Dictionary**.

    b Enter the name of the table (for example, **RuleSet**) in the **File Name** field and then click **Search**.

    c Find the field to be modified and click on the Name column to load it.

    d Modify the data type appropriately and click **OK** to exit the field screen, and then **OK** again to exit the dbdict screen.
4. Follow the **Applications Patch Manager Guide for Content Releases** to install the content in **PD3-9.30.049-contentpatchrel.zip** which will need to be copied and unzipped on the machine hosting the Service Manager Server.

    Note: APM will update the following ScriptLibrary records:

    — WorkflowTriggers
    — Security
    — securityTriggers
    — localizeTable

    In case these scripts have been customized, make sure to keep a backup and restore them after the APM install is complete.
5. After the installation, on the Service Manager system, make the following changes:
    — Increase the size of field **changeTemplate** in table **changeModel** from 80 to 400.

This is to lower the possibility that not all the templates can be saved in the changeModel m1 table if you have selected many templates in a change model. You can enlarge 400 to a lager value if needed.

— Modify the **operator** table in dbdict to avoid the performance issue when clicking the **Request TCAB Approval** button from a Normal Change (For example, the system might take 100 seconds to respond when the DB has 6000 users.):

a Click **Tailoring** > **Database Dictionary**.

b Type `operator` into the File Name field and then click **Search**.

c In the **SQL Tables** tab, add a new table **a6**.

Note: If the **a6** value has already been used, use the first available value between **a7** and **a99**, depending on your specific implementation.

d In the **Keys** tab, place your cursor on the blank header at the bottom of the key list, and then click the **New Field/Key** button to add a new key:

- Type: **Nulls and Duplicates**
- Field: **secRole**

e In the **Fields** tab, change the SQL table for the **secRole** fields:

- **secRole** (array type): change the SQL table from null to **a6** (or whatever value you assigned in Step c above).
- **secRole** (character type): change the SQL table from **m1** to **a6** (or whatever value you assigned in Step c above) and change the SQL Type from **TEXT** to **VARCHAR(200)**

  Important: With this change, field value will be automatically truncated if its length is greater than 200. To prevent data loss, you can adjust the VARCHAR length accordingly.

f Click **OK** to save the changes.

Verified Environments

The Compatibility Matrix lists supported versions of operating systems, browsers, HP Software products, and other compatibility and support information.

To access the Compatibility Matrix:

1. Use a browser to navigate to the Software Support Online (SSO) web page: http://support.openview.hp.com/sc/support_matrices.jsp
2. Log on with your Customer ID and password or your HP Passport sign-in.
3. Navigate to the applicable information.

Support

You can visit the HP Software support web site at:
www.hp.com/go/hpsoftwaresupport

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

HP Software online software support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support site to:

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

Most of the support areas require that you register as an HP Passport user and sign in. Many also require an active support contract. To find more information about support access levels, go to the following URL:
http://h20230.www2.hp.com/new_access_levels.jsp

To register for an HP Passport ID, go to the following URL:
http://h20229.www2.hp.com/passport-registration.html

Legal Notices

Warranty

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

The information contained herein is subject to change without notice.

Restricted Rights Legend

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

Copyright Notice

Trademark Notices

- Adobe™ is a trademark of Adobe Systems Incorporated.
- Java™ is a registered trademark of Oracle and/or its affiliates.
- Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.
- Oracle® is a registered US trademark of Oracle Corporation, Redwood City, California.
- UNIX® is a registered trademark of The Open Group.

For a complete list of open source and third party acknowledgements, visit the HP Software Support Online web site and search for the product manual called HP Service Manager Open Source and Third Party License Agreements.