

HP Service Manager

For the supported Windows® and UNIX® operating systems

Software Version: 9.3x

Compatibility Matrix for Service Manager Applications Content

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How to Use This Document

This document contains the compatibility matrix information about the HP Service Manager (SM) Applications content across SM 9.3x Applications core versions. In the future, when a new SM 9.3x Applications core version or new SM Applications content is released, this document will be updated.

If you find differences between this document and the Release Notes for SM Applications content or core version (for example, the SM 9.31 Release Notes), use the information in this document as final.

In addition, special installation notes and hints for some specific content are also provided in this document. For example, Process Designer Content Pack (PDCP) 9.30.2 is compatible with SM 9.31 according to the compatibility matrix, but when you install this content on SM 9.31, you need to follow a specific installation order.

Notes:

- The following types of Applications unload releases are not covered in this document:
 - Applications unloads in SM hot fixes
 - Applications unloads in SM Binary Patches
 - Applications unloads in SM SRC hot fixes

Normally, these Applications unloads will be merged into the next core version.

- This compatibility matrix document only covers SM Applications content that is released by HP, not the SM content that is released by HP partners.
- This compatibility matrix document only covers content on SM 9.3x Applications core versions, not on SM 7.x or SM 9.2x versions.
- SM Applications core versions refer to SM 9.30 GA Applications, SM 9.30 Applications patches, SM 9.31 GA Applications, and so on.
- SM Applications content refers to SM content packs that contains SM Applications code. Some SM content packs such as the Operation Orchestration content pack only contains jar file.

Service Manager Applications Content Release Order

The following table lists all the SM Applications content released by HP in the order of the release timeline.

The list also includes SM 9.3x Applications core versions starting from the SM 9.30 GA Applications. This is for your reference to apply the correct installation/upgrade order for some specific combinations of content and core version that require an installation/upgrade order (see "[Compatibility Matrix](#)" on page 9).

SM Applications Content Release Order by Release Date

SM Applications Content	Release Timeline
SM 9.30 GA Applications	June, 2011
Operational Reports for Service Manager	June, 2011
HTML Email Solution for Service Manager	August, 2011
SM 9.30 Applications Patch 1	January, 2012
Collaboration Content for Service Manager	January, 2012
Survey Integration Content for Service Manager	February, 2012
UCMDB Integration Content Pack for Service Manager	March, 2012
Process Designer Content Pack 9.30.1	June, 2012
SM 9.30 Applications Patch 2	July, 2012
SM 9.30 Applications Patch 3	September, 2012
SM 9.31 GA Applications	October, 2012
Process Designer Content Pack 9.30.2	January, 2013
Process Designer Content Pack 9.30.3	June, 2013
SM 9.32 GA Applications	August, 2013

For more details of each content pack, visit HP Live Network: <https://hpln.hp.com/group/service-manager>.

For more details of each core version, visit HP Software Support Online (SSO) portal: <http://support.openview.hp.com/>.

Notes:

- For the Operational Reports content, you cannot find the package specifically for SM 9.3x on HP live network; however, the package for SM 9.21 still works on SM 9.3x. Alternatively, you can obtain this content from the CD package of the SM 9.30 GA release.
- Process Designer Content Pack 9.30.0 is not listed in the table above because it is obsolete.
- To avoid confusion, the following table clarifies the mapping between the formal release names and their aliases for Process Designer content packs:

Formal Release Name	Alias
Process Designer Content Pack 9.30.0 (obsolete now)	PDCP 1
Process Designer Content Pack 9.30.1	PDCP 2
Process Designer Content Pack 9.30.2	PDCP 3
Process Designer Content Pack 9.30.3	PDCP 4

Compatibility Matrix and Installation Hints

This section provides the compatibility information for Service Manager Applications content against SM 9.3x core versions and some installation hints.

Compatibility Matrix

The following table shows the compatibility matrix between SM Applications content and SM 9.3x core versions.

Compatibility Matrix

	SM 9.30 GA	SM 9.30 AP1	SM 9.30 AP2	SM 9.30 AP3	SM 9.31 GA	SM 9.32 GA
Operational Reports for Service Manager	Yes	Yes	Yes	Yes	Yes	Yes
HTML Email Solution for Service Manager	Yes	Yes	Yes	Yes	Yes	Merged in core
Collaboration Content for Service Manager	Yes	Yes	Yes	Yes	Merged in core	Merged in core
Survey Integration Content for Service Manager	Yes	Yes	Yes	Yes	Yes	Merged in core
UCMDB Integration Content Pack for Service Manager	Yes	Yes with order	Yes with order	Yes with order	Merged in core	Merged in core
Process Designer Content Pack 9.30.1	Yes	Yes with order	No	No	Yes with order and unload	No
Process Designer Content Pack 9.30.2	Yes	Yes with order	Yes with order	Yes with order	Yes with order	Yes with unload
Process Designer Content Pack 9.30.3	No	No	No	No	Yes with order	Yes with unload

The following table describes the details of different compatibility options listed in the [Compatibility Matrix](#) table.

Compatibility Option Description

Compatibility Option	Description
Yes	This content is supported on this core version. No need to follow additional installation steps or installation order.
Yes with unload	This content is supported on this core version. <ul style="list-style-type: none"> • Need to install an additional compatibility unload after installing the Applications core version and content. As for how to obtain the compatibility unload, refer to the Release Notes for each specific Applications core version. • No need to follow the release time order to upgrade/install the Applications core version and content.
Yes with order	This content is supported on this core version. <ul style="list-style-type: none"> • Need to follow the release time order to upgrade/install the Applications core version and content. • No need to install additional compatibility unload.
Yes with order and unload	This content is supported on this core version. <ul style="list-style-type: none"> • Need to follow the release time order to upgrade/install the Applications core version and content. • Also need to install an additional compatibility unload after installing the Applications core version and content. As for how to obtain the compatibility unload, refer to the Release Notes for each specific Applications core version.
Merged in core	This content is already in this core version; if the functionality of this content is required on this core version, no need to install this content separately.
No	This content is not supported on this core version.

Notes:

- Operational Report, HTML Email, Collaboration, Survey Integration, and UCMDB Integration content packs do not have installation order with each other, and they also do not have installation order with Process Designer Content Packs.

- Process Designer Content Packs are accumulative, and they can be installed separately. For example, Process Designer Content Pack 9.30.2 includes the features in Process Designer Content Pack 9.30.1, so you can install Process Designer Content Pack 9.30.2 directly without first installing Process Designer Content Pack 9.30.1. Whenever possible, HP recommends that you install the latest version of Process Designer Content Pack.
- If you are on SM 9.32 and you have ever enabled the primary key mode, installing Process Designer Content Pack 9.30.2 or Process Designer Content Pack 9.30.3 is not supported, even if you disable the primary key mode at a later time.

- Process Designer Content Pack 9.30.1:

Although Process Designer Content Pack 9.30.1 is compatible with SM 9.31 features in general, it is not compatible with SM 9.31 Mobility.

- Process Designer Content Pack 9.30.2:

For the combination of Process Designer Content Pack 9.30.2 and SM 9.31 GA, you must use SM 9.31 Patch 3 as your SM binaries, which can be downloaded from SSO.

- Process Designer Content Pack 9.30.3:

- Although Process Designer Content Pack 9.30.3 is compatible with SM 9.31 features in general, it is not compatible with SM 9.31 Mobility.

In addition, for the combination of Process Designer Content Pack 9.30.3 and SM 9.31 GA, you must use SM 9.31 Patch 3 as your SM binaries, which can be downloaded from SSO.

- Process Designer Content Pack 9.30.3 already contains the HTML Email Solution content:

If Process Designer Content Pack 9.30.3 is already installed and you want to use the HTML Email Solution, you do not need to install the HTML Email Solution content additionally.

If the HTML Email Solution content is already installed, Process Designer Content Pack 9.30.3 can still be installed on top of it without affecting its functionality. However, before applying Process Designer Content Pack 9.30.3, you must set the current value for `htmltemplates` in the `counters` table to the maximum value of the `htmltemplates` table's `id` field:

- i. Open Database Manager, search for the `counters` table, and then search for `htmltemplates` by Table Name.
- ii. In the **Current Value** field, set it to the maximum value of the `htmltemplates` table's `id` field.

Language Packs for Content Packs

The language packs for Process Designer Content Pack 9.30.1 and Process Designer Content Pack 9.30.3 have been released on HP Live Network. The following table describes the compatibility and the installation order between the language packs for Process Designer Content Packs and the language packs for Service Manager.

	SM 9.30 Language Pack	SM 9.32 Language Pack
Language Pack for Process Designer Content Pack 9.30.1	<p>Follow this installation order:</p> <ol style="list-style-type: none"> 1. Install SM 9.30 language pack. 2. Install the language pack for Process Designer Content Pack 9.30.1. 	Not supported.
Language Pack for Process Designer Content Pack 9.30.3	<p>Follow this installation order:</p> <ol style="list-style-type: none"> 1. Install SM 9.30 language pack. 2. Install the language pack for Process Designer Content Pack 9.30.3. 	<p>To support this combination, a compatibility unload is needed.</p> <p>For detailed instructions, see the "Applying the compatibility unload for SM 9.32 language pack" section in document <i>Application Manager Guide for Process Designer Content Pack 9.30.3 Language Pack</i>. This document is released together with the language pack for Process Designer Content Pack 9.30.3 on HP Live Network.</p>

Note: For detailed instructions on installing these language packs, refer to Release Notes for each language pack.

Installation Hints

Apart from Operation Reports, all other SM Applications content can only work on SM 9.3x Applications core versions. Therefore, if you are in an SM Applications core version earlier than SM 9.3x, you need to upgrade SM Applications core version first.

Typically, before you install the SM Applications content that you want to use, you need to refer to the [Compatibility Matrix table](#) and [Release Order table](#) to decide your installation/upgrade path.

The following are some typical scenarios to help you install SM Applications content:

- [Scenario 1: For new customers to install both Process Designer Content Pack 9.30.3 and SM 9.32](#)
- [Scenario 2: Install SM 9.32 Applications on top of SM 9.31 and Process Designer Content Pack 9.30.2](#)
- [Scenario 3: Install SM 9.31 Applications on top of SM 9.30 GA and Process Designer Content Pack 9.30.2](#)
- [Scenario 4: Install Process Designer Content Pack 9.30.3 on top of SM 9.30 GA and Process Designer Content Pack 9.30.1](#)

The following are some more scenarios to help you further understand how to use the [Compatibility Matrix table](#) and [Release Order table](#):

- [Scenario 5: Understand “Yes with order”](#)
- [Scenario 6: Understand “Yes with unload”](#)
- [Scenario 7: Understand “Yes with order and unload”](#)
- [Scenario 8: Understand “Yes with order and unload”](#)
- [Scenario 9: Understand some incompatibility cases for “Yes with order”](#)

Scenario 1: For new customers to install both Process Designer Content Pack 9.30.3 and SM 9.32

If you are a new customer and you want to use Process Designer Content Pack 9.30.3 and SM 9.32, follow these steps:

1. Install the SM 9.30 GA server and Applications.
2. Upgrade SM server from SM 9.30 GA to SM 9.32 GA.

Note: Since you plan to use SM 9.32 Applications, you do not need to load the unload files in the `platform_unloads` folder of the SM 9.32 GA Server Patch installation package.

3. Check the compatibility option for Process Designer Content Pack 9.30.3 and SM 9.32 Applications in the [Compatibility Matrix table](#).

The compatibility option is “Yes with unload”.

4. In this case, you can first upgrade SM Applications from SM 9.30 GA to SM 9.32 Applications, then install and *enable* Process Designer Content Pack 9.30.3, and lastly apply the compatibility unload. For more information about installing the compatibility unload, see ["Installation Order 2: from SM 9.32 Applications to Process Designer Content Pack 9.30.3"](#) on page 22.

Note: For this fresh installation scenario, because there is no customization, when applying the compatibility unload, you are recommended to use the database manager instead of the unload manager to simplify the installation.

Scenario 2: Install SM 9.32 Applications on top of SM 9.31 and Process Designer Content Pack 9.30.2

If you are on SM 9.31 with Process Designer Content Pack 9.30.2 and you want to upgrade to SM 9.32 Applications, follow these steps:

1. Check compatibility option for the Process Designer Content Pack 9.30.2 and SM 9.32 Applications in the [Compatibility Matrix table](#).

The compatibility option is “Yes with unload”.

2. In this case, you can upgrade to SM 9.32 Applications by following the instructions as described in ["Installation Order 1: from Process Designer Content Pack 9.30.2 to SM 9.32 Applications"](#) on page 20.

Scenario 3: Install SM 9.31 Applications on top of SM 9.30 GA and Process Designer Content Pack 9.30.2

If you are on SM 9.30 GA with Process Designer Content Pack 9.30.2 and you want to upgrade to SM 9.31 Applications, follow these steps:

1. Check the compatibility option for Process Designer Content Pack 9.30.2 and SM 9.31 Applications in the [Compatibility Matrix table](#).

The compatibility option is “Yes with order”.

2. Check the [Release Order table](#).

Process Designer Content Pack 9.30.2 is released after SM 9.31 Applications.

3. In this case, you cannot upgrade to SM 9.31 Applications while you have already installed Process Designer Content Pack 9.30.2. This is because the compatibility option for this combination is "Yes with order", so you must install SM 9.31 Applications prior to Process Designer Content Pack 9.30.2 according to the release time order.

However, instead of SM 9.31 Applications, you can choose to upgrade to SM 9.32 Applications as the compatibility option is "Yes with unload" for the combination of Process Designer Content Pack 9.30.2 and SM 9.32 Applications. For more information, see "[Process Designer Content Pack 9.30.2 Compatibility Unload with SM 9.32](#)" on page 20.

Scenario 4: Install Process Designer Content Pack 9.30.3 on top of SM 9.30 GA and Process Designer Content Pack 9.30.1

If you are on SM 9.30 GA with Process Designer Content Pack 9.30.1 and you want to use Process Designer Content Pack 9.30.3, follow these steps:

1. Go through the [Compatibility Matrix table](#) to see which SM Applications core versions are supported for Process Designer Content Pack 9.30.3.

It supports only SM 9.31 Applications and SM 9.32 Applications. Therefore, you need to upgrade your SM core version because the supported core version is different than your current version. For example, you decide to upgrade your Service Manager to SM 9.32 Applications.

2. Check the Process Designer Content Pack 9.30.3 compatibility options for SM 9.32 Applications.

It is "Yes with unload".

3. In this case, you can first upgrade from SM 9.30 GA Applications to SM 9.32 Applications, then install and *enable* Process Designer Content Pack 9.30.3, and lastly install the compatibility unload. For more information about installing the compatibility unload, see "[Installation Order 2: from SM 9.32 Applications to Process Designer Content Pack 9.30.3](#)" on page 22.

Scenario 5: Understand "Yes with order"

If you are on SM 7.11 and you want to use Process Designer Content Pack 9.30.2, follow these steps:

1. Go through the [Compatibility Matrix table](#) to see which SM Applications core versions are supported for Process Designer Content Pack 9.30.2.

It supports all the SM 9.3x core versions.

2. The supported core version is different than your current version, so you need to upgrade your core version. For example, upgrade to SM 9.31 GA Applications.

Tip: You are recommended to use SM Upgrade Utilities for the upgrade. For more information, refer to the Upgrade Guide for each core version.

3. Check the compatibility option between Process Designer Content Pack 9.30 and SM 9.31 GA Applications.

It is “Yes with order”, so you need to check the [Release Order table](#).

4. Check the [Release Order table](#).

Process Designer Content Pack 9.30.2 is released after SM 9.31 GA Applications.

5. In this case you can first upgrade from SM 7.11 to SM 9.31 GA Applications, and then install Process Designer Content Pack 9.30.2.

Scenario 6: Understand “Yes with unload”

If you are on SM 7.11 and you want to use Process Designer Content Pack 9.30.3, follow these steps:

1. Go through the [Compatibility Matrix table](#) to see which SM Applications core versions are supported for Process Designer Content Pack 9.30.3.

It supports only SM 9.31 or SM 9.32 GA Applications.

2. The supported core version is different than your current version, so you need to upgrade your core version. For example, upgrade to SM 9.32 GA Applications.

Tip: You are recommended to use SM Upgrade Utilities for the upgrade. For more information, refer to the Upgrade Guide for each core version.

3. Check the compatibility option between Process Designer Content Pack 9.30.3 and SM 9.32 GA Applications.

It is “Yes with unload”.

4. In this case, you can first upgrade from SM 7.11 to SM 9.32 GA Applications, then install Process Designer Content Pack 9.30.3, and lastly install the compatibility unload.

Scenario 7: Understand “Yes with order and unload”

If you are on SM 7.11 and you want to use Process Designer Content Pack 9.30.1, follow these steps:

1. Go through the [Compatibility Matrix table](#) to see which SM Applications core versions are supported for Process Designer Content Pack 9.30.1.

It supports SM 9.30 GA Applications, SM 9.30 AP1, and SM 9.31 GA Applications.

2. Decide the core version to which you want to upgrade. For example, upgrade to SM 9.31 GA Applications.

Tip: You are recommended to use SM Upgrade Utilities for the upgrade. For more information, refer to the Upgrade Guide for each core version.

3. Check the compatibility option between Process Designer Content Pack 9.30.1 and SM 9.31 GA Applications.

It is “Yes with order and unload”.

4. Check the [Release Order table](#).

Process Designer Content Pack 9.30.1 is released before SM 9.31 GA Applications but after SM 9.30 GA Applications.

5. In this case, you can first upgrade to SM 9.30 GA Applications, then install Process Designer Content Pack 9.30.1, then upgrade to SM 9.31 GA Applications, and lastly apply the compatibility unload.

You cannot first upgrade to SM 9.31 GA Applications and then install Process Designer Content Pack 9.30.1, because Process Designer Content Pack 9.30.1 is required to be installed before SM 9.31 GA Applications according to the [Release Order table](#).

Scenario 8: Understand “Yes with order and unload”

If you are a new customer and you want to use Process Designer Content Pack 9.30.1 on SM 9.31 GA Applications, follow these steps:

1. Go through the [Compatibility Matrix table](#) to see which SM Applications core versions are supported for Process Designer Content Pack 9.30.1.

It supports SM 9.30 GA Applications, SM 9.30 AP1, and SM 9.31 GA Applications. Therefore, you can use Process Designer Content Pack 9.30.1 on SM 9.31 GA Applications.

2. Check the compatibility option between Process Designer Content Pack 9.30.1 and SM 9.31

GA Applications.

It is “Yes with order and unload”.

3. Check the [Release Order table](#).

Process Designer Content Pack 9.30.1 is released before SM 9.31 GA Applications but after SM 9.30 GA Applications.

4. In this case, you first need to install SM 9.30 GA Applications, then install Process Designer Content Pack 9.30.1, then upgrade to SM 9.31 GA Applications, and lastly apply the compatibility unload.

Scenario 9: Understand some incompatibility cases for “Yes with order”

If you are on SM 9.31 GA and you want to use Process Designer Content Pack 9.30.1, follow these steps:

1. Go through the [Compatibility Matrix table](#) to see which SM Applications core versions are supported for Process Designer Content Pack 9.30.1.

It supports SM 9.30 GA Applications, SM 9.30 AP1, and SM 9.31 GA Applications. The supported core versions includes your current version, so no need to upgrade.

2. Check the compatibility option between Process Designer Content Pack 9.30.1 and SM 9.31 GA Applications.

It is “Yes with order and unload”.

3. Check the [Release Order table](#).

Process Designer Content Pack 9.30.1 is released before SM 9.31 GA Applications.

4. In this case, you cannot install Process Designer Content Pack 9.30.1 on top of SM 9.31 GA Applications because Process Designer Content Pack 9.30.1 needs to be installed before installing SM 9.31 GA Applications according to the release time order.

Compatibility Unload Installation

This section describes the details on installing the compatibility unload when it is indicated in the [Compatibility Matrix table](#).

Process Designer Content Pack 9.30.1 Compatibility Unload with SM 9.31

The compatibility option is "Yes with order and unload" for the combination of Process Designer Content Pack 9.30.1 and SM 9.31. Therefore, apart from installing Process Designer Content Pack 9.30.1 and SM 9.31 based on the release order in the [Release Order table](#), you also need to apply a compatibility unload (QCCR1E78589_SM931_PD2.un1) by following the instructions below:

1. According to the release order in the [Release Order table](#), first install Process Designer Content Pack 9.30.1.
2. Apply SM 9.31 Applications.

When applying SM 9.31 Applications, a certain amount of renamed records will be generated, as listed in the [Unload Change List for Process Designer Content Pack 9.30.1 and SM 9.31 table](#).

- If you have not customized the records listed in renamed record list above in Process Designer Content Pack 9.30.1, keep the Process Designer 9.30.1 version (do not merge it with the SM 9.31 Applications) during the installation of SM 9.31.
 - For those customized records that are not in renamed record list, you need to resolve the conflicts before applying the compatibility unloads.
3. Apply the compatibility unload (QCCR1E78589_SM931_PD2.un1) to resolve the renamed records by using the SM Unload Manager or the SM Database Manager. For details, refer to "[Installing Compatibility Unload](#)" on page 22.
 4. After you resolve all the renamed records, follow the *Applications Patch Manager Guide* (released with SM 9.31) to create and apply production patch to your production system.

Process Designer Content Pack 9.30.2 Compatibility Unload with SM 9.32

According to the [Compatibility Matrix table](#), the compatibility option is "Yes with unload" for the combination of Process Designer Content Pack 9.30.2 and SM 9.32 Applications. That means, you can either install your system from Process Designer Content Pack 9.30.2 to SM 9.32 Applications, or from SM 9.32 Applications to Process Designer Content Pack 9.30.2.

Installation Order 1: from Process Designer Content Pack 9.30.2 to SM 9.32 Applications

If you have already installed Process Designer Content Pack 9.30.2, follow these steps to install SM 9.32 Applications:

1. Download the compatibility data files.
 - a. Go to HP Live Network at <http://hpln.hp.com>.
 - b. Navigate to **Home > Service Manager > Content Catalog**.
 - c. Click the **Process Designer Content Packs for Service Manager** link, and then click **Downloads**.
 - d. Locate the 9.30.2 folder, and then download PD3_SM932.dta and PD3_SM932_sigs.dta.
2. Move PD3_SM932.dta and PD3_SM932_sigs.dta to the data folder in SM 9.32 Applications Patch installation package.
3. Follow the *Applications Patch Manager Guide* (released with SM 9.32) to install SM 9.32 Applications Patch.

Installation Order 2: from SM 9.32 Applications to Process Designer Content Pack 9.30.2

If you have already upgraded to SM 9.32 or newly installed SM 9.32, and later you want to install Process Designer Content Pack 9.30.2, follow these steps:

1. Install Process Designer Content Pack 9.30.2.

When applying Process Designer Content Pack 9.30.2, a certain amount of renamed records will be generated, as listed in the [Unload Change List for Process Designer Content Pack 9.30.2 and SM 9.32](#) table.

- If you have not customized the records listed in the unload change list in SM 9.32, keep the SM 9.32 version (do not merge it with the Process Designer Content Pack 9.30.2) during the installation of Process Designer Content Pack 9.30.2.

- For those customized records that are not in the unload change list, you need to resolve the conflicts before applying the compatibility unloads.

Note: In addition, if you see the following error record generated and you have not customized it, you do not need to resolve the conflict as it will be handled by the compatibility unload.

Object Type	Object Name
WorkflowPhase	externalKnowledgekmdocument

2. Apply the compatibility unload (SM932_PD3_compatibility.unl) to resolve the renamed records by using the SM Unload Manager or the SM Database Manager. For details, refer to ["Installing Compatibility Unload" on the next page](#).

Note: This compatibility unload is released in the 9.30.2 folder under the **Downloads** section for Process Designer Content Packs on HP Live Network (<http://hpln.hp.com>).

3. After you resolve all the renamed or error records, follow the *Applications Patch Manager Guide for Content Packs* (released with Process Designer Content Pack 9.30.2) to create and apply production patch to your production system.

Process Designer Content Pack 9.30.3 Compatibility Unload with SM 9.32

According to the [Compatibility Matrix table](#), the compatibility option is "Yes with unload" for the combination of Process Designer Content Pack 9.30.3 and SM 9.32 Applications. That means, you can either install your system from Process Designer Content Pack 9.30.3 to SM 9.32 Applications, or from SM 9.32 Applications to Process Designer Content Pack 9.30.3.

Installation Order 1: from Process Designer Content Pack 9.30.3 to SM 9.32 Applications

If you have already installed SM 9.31 and Process Designer Content Pack 9.30.3, and then you want to upgrade to SM 9.32, follow these steps:

1. Make sure that you have enabled Process Designer Help Desk before upgrading to SM 9.32.
2. Upgrade your Service Manager to SM 9.32.

The additional compatibility unload will be installed automatically during the installation of SM 9.32, so you do not need to manually install it.

Installation Order 2: from SM 9.32 Applications to Process Designer Content Pack 9.30.3

If you have already upgraded to SM 9.32 or newly installed SM 9.32, and later you want to install Process Designer Content Pack 9.30.3, follow these steps to apply a compatibility unload (SM932_PD4_compatibility.unl):

1. Install Process Designer Content Pack 9.30.3, and make sure that Process Designer Help Desk is enabled.

When applying Process Designer Content Pack 9.30.3, a certain amount of renamed records will be generated, as listed in the [Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32](#) table.

- If you have not customized the records listed in the unload change list in SM 9.32, keep the SM 9.32 version (do not merge it with the Process Designer Content Pack 9.30.3) during the installation of Process Designer Content Pack 9.30.3.
 - For those customized records that are not in the unload change list, you need to resolve the conflicts before applying the compatibility unloads.
2. Apply the compatibility unload (SM932_PD4_compatibility.unl) to resolve the renamed records by using the SM Unload Manager or the SM Database Manager. For details, refer to ["Installing Compatibility Unload"](#) below.

Note: This compatibility unload is released in the 9.30.3 folder under the **Downloads** section for Process Designer Content Packs on HP Live Network (<http://hpln.hp.com>).

3. After you resolve all the renamed records, follow the *Applications Patch Manager Guide for Content Packs* (released with Process Designer Content Pack 9.30.3) to create and apply production patch to your production system.

Installing Compatibility Unload

To load an unload file using Unload Manager:

1. Go to **System Administration > Ongoing Maintenance > Unload Manager**.
2. Double-click **Apply Unload**. A wizard opens.
3. Select the unload file you want to apply, also specify a backup file, and then click **Next**. Details of the unload file appear.
4. Double-click a conflicting object in the table to open the merge tool:
 - a. If you have not customized it (for example, you are a new customer installing SM 9.32 and Process Designer Content Pack 9.30.3, and you do not have any tailored record.), you can directly use the unload object and mark it as reconciled. Otherwise, you need to merge the

record and then mark it as reconciled.

- b. Click **Save** to go back to the wizard.
5. Click **Next** after all the conflicting objects are reconciled.
6. Click **Yes** on the confirmation window to apply the unload.
7. Click **Finish**.

Now, the unload has been applied and at the same time your old data backed up.

To load an unload file using Database Manager:

1. Make sure the Windows client is configured for server-side load/unload.
 - a. From the Windows client, go to **Window > Preferences > HP Service Manager**.
 - b. Unselect **Client Side Load/Unload** if is flagged.
 - c. Restart the Windows client.
2. Open **Tailoring > Database Manager**.
3. Right-click the form or open the More Actions menu and select **Import/Load**.
4. Browse to the unload file, and view the contents of an unload file before importing it by clicking **List Contents**.
5. Make a backup copy of all files to be modified by this unload.

6. Fill in the following fields.

Field	Description
File Name	Type the name and path of the file to load.
Import Descriptor	Since unload files do not require an Import Descriptor record, leave this field blank.
File Type	Select the source operating system of the unload file.
Messages Option — All Messages	Select this option to see all messages that Service Manager generates loading the file.
Messages Option — Totals Only	Select this option to see only the total number of files Service Manager loads.
Messages Option — None	Select this option to hide all messages that Service Manager generates when loading the file.

7. Click **Load FG**.

Note: If you have customized the records that are in the unload change list, you still need to manually merge your customization after you load the compatibility unload.

Change List in Compatibility Unload

For the compatibility option “Yes with unload” or “Yes with unload and order”, it requires additional installation of a compatibility unload that usually comes with each core version release.

You are recommended to use the Unload Manager to import the unload files. For how to use the Unload Manager, see ["Installing Compatibility Unload" on page 22](#).

This unload installation can override your customization if your customization is within the same change list of the compatibility unload. Therefore, you are recommended to back up your customization code based on the change list provided in this document.

Note: For SM 9.31, the unload change list is also included in the SM 9.31 Release Notes. After SM 9.31, the change list will only be included in this document.

Unload Change List for Process Designer Content Pack 9.30.1 and SM 9.31

Object Type	Object Name
Application Cluster	cm.change.catphase
Application Cluster	cm3.last.task.process
Application Cluster	db.mass.functions
Application Cluster	display
Application Cluster	sla.refresh.active
Application Cluster	trigger.cm3t.post.edit
Object	cm3r
Process	cm.chg.cat
Process	cm.chg.phase
Process	template.init
ScriptLibrary	ApprovalUtil
ScriptLibrary	ChangeOperatorInfo
ScriptLibrary	changeManagement
ScriptLibrary	tableAccess
activityactions	Update Activitiescm3r
format	CM.change.approvalen
format	CM.change.approvalprepen
format	CM.change.closureen
format	CM.change.implementationen
format	CM.change.loggingen
format	CM.change.planningen
format	CM.change.reviewen
formatctrl	cm3r
formatctrl	cm3rcatphase.main
link	cm3r

Unload Change List for Process Designer Content Pack 9.30.2 and SM 9.32

Object Type	Object Name
screlconfig	cm3r
wizard	Set Change State - Start
svcCatInterface	Open a Change
ScriptLibrary	ApplyChangeModel
ScriptLibrary	ApprovalUtil
ScriptLibrary	ChangeOperatorInfo
ScriptLibrary	RuleEngine
ScriptLibrary	ScAPI_ApprovalDelegation
ScriptLibrary	changeManagement
ScriptLibrary	changePlan
ScriptLibrary	processDesignerChangeUpgrade
ScriptLibrary	recordUpdateConflicts
ScriptLibrary	security
ScriptLibrary	svcCatInterface
Process	change.update.save
Process	cm.approve
Process	cm.chg.cat
Process	cm.chg.phase
Process	cm.update
States	change.close
States	change.view
States	patchrelresults.view
displayoption	change.view_merge
displayoption	cm.close.display_merge
displayoption	scm.advanced_massupdate
WorkflowPhase	AbandonedGeneric Taskcm3t
WorkflowPhase	ActiveGeneric Taskcm3t

Unload Change List for Process Designer Content Pack 9.30.2 and SM 9.32, continued

Object Type	Object Name
WorkflowPhase	CancelledGeneric Taskcm3t
WorkflowPhase	ClosedGeneric Taskcm3t
WorkflowPhase	ReviewGeneric Taskcm3t
WorkflowPhase	WaitingGeneric Taskcm3t
WorkflowPhase	closedCreate Groupcm3t
WorkflowPhase	closedCreate Releasecm3t
WorkflowPhase	closedDelete Groupcm3t
WorkflowPhase	closedHardwarecm3t
WorkflowPhase	closedIdentify Affected Systemscm3t
WorkflowPhase	closedMaintenancecm3t
WorkflowPhase	closedNetworkcm3t
WorkflowPhase	closedSoftwarecm3t
WorkflowPhase	closedUpdate Affected Systemscm3t
WorkflowPhase	closedUpdate Groupcm3t
WorkflowPhase	concludeKnowledgekmdocument
WorkflowPhase	draftKnowledgekmdocument
WorkflowPhase	externalKnowledgekmdocument
WorkflowPhase	internalKnowledgekmdocument
WorkflowPhase	retiredKnowledgekmdocument
WorkflowPhase	reviewKnowledgekmdocument
WorkflowPhase	reviseKnowledgekmdocument
WorkflowPhase	triageKnowledgekmdocument
Object	cm3r
datadict	WorkflowPhase
datadict	cm3r
menu	ChM
menu	SYSTEM ADMINISTRATION

Unload Change List for Process Designer Content Pack 9.30.2 and SM 9.32, continued

Object Type	Object Name
link	cm3r
formatctrl	AlertDef
formatctrl	cm3r
format	enWorkflowPhase
format	encm3r.cigroup.g
format	enkmdocument.errormsg
format	enkmdocument.external
format	enkmdocument.howto
format	enkmdocument.probsol
format	enkmdocument.reference
format	enoperator.g
format	ensc.manage.approval.g
extaccess	ChangeChangeManagement
extaccess	ChangeTaskChangeManagement
cm3rcatphase	Change Implementation
code	ag.editor
code	approval.build
code	approval.inbox
code	approval.init
code	cm.change.catphase
code	cm3.last.task.process
code	dbdict.utility
code	display
code	se.external.action
code	sla.refresh.active
activityactions	Update Activitiescm3r
globallists	localizedTables

Unload Change List for Process Designer Content Pack 9.30.2 and SM 9.32, continued

Object Type	Object Name
unload	PD3_932_Support

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32

Object Type	Object Name
Object	cm3r
Object	imTask
Object	incidents
Object	probsummary
Object	rootcause
Process	cc.search
Process	change.open.save
Process	change.update.save
Process	cm.approve
Process	cm.chg.cat
Process	cm.chg.phase
Process	cm.update
Process	document.chgCat
Process	im.dmeUpdate
Process	im.incident.clone
Process	im.task.create
Process	inbox.init.view
Process	pbm.task.create
Process	template.init
code	Ruleset.run
code	alert.process
code	apm.compute.linked.close

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
code	apm.server.initer
code	apm.setup.globals
code	approval.approve
code	approval.build
code	approval.delegation.get.groups
code	approval.inbox
code	approval.init
code	cc.gotoprob
code	cc.required.actions
code	cc.search
code	cc.set.linked
code	cm.change.catphase
code	cm3.last.task.process
code	cm3.query.build
code	display
code	document.chgCat
code	ocm.query.build
code	rca.setup.search
code	record.update.conflicts
code	scheduler
code	scm.advanced
code	se.base.method
code	se.call.process
code	se.external.action
code	se.search.engine
code	se.view.engine
code	sla.refresh.active

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
code	sm.update.affected.services
code	svcCat.create.request
code	trigger.probsummary.edit
code	trigger.screlate.post
code	trigger.subscription.cm3r
code	us.check.depend.canclose
code	us.link
RuleSet	im.clear.vars
RuleSet	im.dmeUpdate
RuleSet	im.fields.validation
RuleSet	im.incident.closure.after.merge
RuleSet	im.set.activity.vars
RuleSet	im.set.open.inform
RuleSet	im.standard.mandatory
RuleSet	im.task.clear.vars
RuleSet	im.task.set.activity.vars
RuleSet	kmdocument_preview
RuleSet	pbm.standard.mandatory
RuleSet	sd.first.call.close
RuleSet	sd.standard.mandatory
ScriptLibrary	ApplyChangeModel
ScriptLibrary	ApprovalDelegationGroups
ScriptLibrary	ApprovalUtil
ScriptLibrary	ArrayUtil
ScriptLibrary	BasicDAO
ScriptLibrary	ChangeOperatorInfo
ScriptLibrary	IncidentDAO

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
ScriptLibrary	KMCollection_Update_Triggers
ScriptLibrary	ProcessDesignHelpDeskEnableManager
ScriptLibrary	QueryHelper
ScriptLibrary	RuleEngine
ScriptLibrary	RuleWizardHelpers
ScriptLibrary	ScAPI_ApprovalDelegation
ScriptLibrary	ScAPI_Dispatcher
ScriptLibrary	ScAPI_RAD
ScriptLibrary	ScAPI_svcCatRequest
ScriptLibrary	SeExternalHelper
ScriptLibrary	Template
ScriptLibrary	TemplateFilter
ScriptLibrary	Workflow
ScriptLibrary	WorkflowTriggers
ScriptLibrary	activityUpdatesTailoring
ScriptLibrary	changeManagement
ScriptLibrary	changePlan
ScriptLibrary	conditionXmlParser
ScriptLibrary	htmlmailtemplates
ScriptLibrary	recordUpdateConflicts
ScriptLibrary	security
ScriptLibrary	settings
ScriptLibrary	svcCatInterface
ScriptLibrary	tableAccess
ScriptLibarray	processDesignerChangeUpgrade
WorkflowPhase	AbandonedGeneric Taskcm3t
WorkflowPhase	ActiveGeneric Taskcm3t

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
WorkflowPhase	CancelledGeneric Taskcm3t
WorkflowPhase	ClosedGeneric Taskcm3t
WorkflowPhase	ClosureIncidentprobsummary
WorkflowPhase	KM 1 TriageKM Documentcm3r
WorkflowPhase	KM 2 ReviseKM Documentcm3r
WorkflowPhase	KM 3 Review Read-onlyKM Documentcm3r
WorkflowPhase	KM 4 ConcludeKM Documentcm3r
WorkflowPhase	Phase 1WorkflowDemoWorkflowDemo
WorkflowPhase	Phase 2WorkflowDemoWorkflowDemo
WorkflowPhase	ReviewGeneric Taskcm3t
WorkflowPhase	WaitingGeneric Taskcm3t
WorkflowPhase	closedCreate Groupcm3t
WorkflowPhase	closedCreate Releasecm3t
WorkflowPhase	closedDelete Groupcm3t
WorkflowPhase	closedHardwarecm3t
WorkflowPhase	closedIdentify Affected Systemscm3t
WorkflowPhase	closedMaintenancecm3t
WorkflowPhase	closedNetworkcm3t
WorkflowPhase	closedSoftwarecm3t
WorkflowPhase	closedUpdate Affected Systemscm3t
WorkflowPhase	closedUpdate Groupcm3t
WorkflowPhase	concludeKnowledgekmdocument
WorkflowPhase	draftKnowledgekmdocument
WorkflowPhase	externalKnowledgekmdocument
WorkflowPhase	internalKnowledgekmdocument
WorkflowPhase	newtestWorkflowDemo
WorkflowPhase	retiredKnowledgekmdocument

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
WorkflowPhase	reviewKnowledgekmdocument
WorkflowPhase	reviseKnowledgekmdocument
WorkflowPhase	triageKnowledgekmdocument
Workflow	Incident TaskimTask
Workflow	Problemrootcause
Workflow	Problem Taskrootcausetask
activityactions	Save Activitiesincidents
activityactions	Update Activitiescm3r
activityactions	Update Activitiesincidents
activityactions	Update Activitiesprobsummary
activityactions	Update Activitiesrootcause
activityactions	Update Activitiesrootcausetask
bdmmapping	incident1.1
bdmmapping	incident1.2
displayoption	cm.list.display_masscancel
displayoption	kmdocFlow.open_deletedoc
displayoption	kmdocFlow.open_save
displayoption	kmdocFlow.open_save draft
displayoption	kmquery.default_newsearch_1
displayoption	scm.advanced_massupdate
displayoption	wizard.display.eaf.editSetting_do nothing_1
extaccess	ChangeChangeManagement
extaccess	ChangeTaskChangeManagement
extaccess	IncidentIncidentManagement
extaccess	InteractionServiceDesk
extaccess	ProblemProblemManagement
extaccess	ProblemTaskProblemManagement

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
format	enAlertDef.g
format	enApprovalLog.vj.g.horz
format	enCM.change.approval
format	enCM.change.approvalprep
format	enCM.change.closure
format	enCM.change.dme.vj
format	enCM.change.implementation
format	enCM.change.logging
format	enCM.change.planning
format	enCM.change.review
format	enWorkflowPhase
format	enchm.discover.assess
format	enchm.discover.backout
format	enchm.discover.closure
format	enchm.discover.implement
format	enchm.discover.verification
format	enchm.emergency.approval
format	enchm.emergency.backout
format	enchm.emergency.build.test
format	enchm.emergency.implmt
format	enchm.emergency.pir
format	enchm.emergency.registration
format	enchm.emergency.rsk.imp
format	enchm.normal.backout
format	enchm.normal.build.test
format	enchm.normal.dcab.approval
format	enchm.normal.deployment

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
format	enchm.normal.pir
format	enchm.normal.registration
format	enchm.normal.rsk.imp
format	enchm.normal.tcab.approval
format	enchm.standard.backout
format	enchm.standard.execution
format	enchm.standard.pir
format	enchm.standard.pln.sch
format	enchm.standard.registration
format	enchm.subform.activity
format	encm3r.cigroup.g
format	encm3r.release
format	encm3r.release.close
format	encm3r.subscription
format	enhtmltemplates
format	enim.task.subform.activities
format	eninfo.company.g
format	enkmdocument.errormsg
format	enkmdocument.external
format	enkmdocument.howto
format	enkmdocument.probsol
format	enkmdocument.reference
format	enoperator.g
format	enpbm.problem.subform.categorization
format	enpbm.task.subform.detail
format	ensc.manage.approval.g
format	ensd.interaction.subform.categorization

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
format	entemp.edit.ooflow
format	entemp.readonly.ooflow
format	enwiz.slo.resp.3b
formatctrl	AlertDef
formatctrl	ApprovalDef
formatctrl	cm3r
formatctrl	extaccess
formatctrl	operator
formatctrl	probsummary
formatctrl	svcCat.request.info
formatctrl	wiz.slo.resp.2
kmknowledgebase	KnownError_Library
kmknowledgebase	Problem_Library
link	cm3r
link	incidents
link	probsummary
link	rootcause
menu	CC PD
menu	ChM
menu	ESSSM
menu	ESSSM-Approval
menu	HELPDESK GEN
menu	HOME
menu	NOTIFICATIONS
menu	SYSTEM ADMINISTRATION
menu	TAILORING
svcCatInterface	Open a Change

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
unload	PD4_932_Support
wizard	Approval Delegation - Prep Select Group
wizard	Approval Delegation - Select Module
wizard	Set Change State - Start
wizard	editSetting.selectConfig
htmltemplates	Survey Templateen
htmltemplates	Survey Template Simpleen
format	enhtmltemplates
globallists	Interaction Local Completion Codes
globallists	Interactions Activity Types
globallists	Problem Activity Types
globallists	Problemtask Activity Types
States	change.close
States	change.view
States	cm.list
States	imIncident.view
States	imTask.view
States	pbm.task.view
States	pbm.view
States	sd.view
displayoption	change.view_merge
displayoption	cm.close.display_merge
displayoption	imIncident.view_merge
displayoption	imIncident.view_save_1
displayoption	imTask.view_merge
displayoption	pbm.task.view_merge
displayoption	pbm.view_merge

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
displayoption	sd.view_merge
displayscreen	change.viewENG
displayscreen	cm.close.displayENG
displayscreen	cm.list.displayENG
displayscreen	imIncident.viewENG
displayscreen	imTask.viewENG
displayscreen	pbm.task.viewENG
displayscreen	pbm.viewENG
displayscreen	sd.viewENG
inbox	nullMy Group's To Do ListTodo%NONE%
language	heE
probcause	probAutomatically ClosedAutomatically Closed
probcause	probCancelledCancelled
probcause	probFulfilledFulfilled
probcause	probInvalidInvalid
probcause	probNot ReproducibleNot Reproducible
probcause	probOut of ScopeOut of Scope
probcause	probRequest RejectedRequest Rejected
probcause	probSolved by Change/Service RequestSolved by Change/Service Request
probcause	probSolved by User InstructionSolved by User Instruction
probcause	probSolved by WorkaroundSolved by Workaround
probcause	probUnable to solveUnable to solve
probcause	probWithdrawn by UserWithdrawn by User
secRights	DEFAULTIncident Tasks
secRights	SD agent/managerIncident Tasks

Unload Change List for Process Designer Content Pack 9.30.3 and SM 9.32, continued

Object Type	Object Name
secRights	incident managerIncident Management Configuration
cm3rcatphase	Change Implementation

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Feedback on Service Manager, 9.3x Compatibility Matrix for Service Manager Applications Content

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