

HP SM Service Catalog-PPM Center Project Proposal Integration Solution

For the Windows® operating system

Software Version: 1.01

Configuration Guide

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Contents

- Contents 5
- Configuring Service Manager 6
 - Prerequisite 6
 - Configuring Service Manager 6
 - Loading the integration template unload file 6
 - Adding an integration instance 8
 - Configuring the Service Manager Web tier server URL 14
- Configuring PPM Center16
 - Configuring the PPM Workbench16
 - Configuring the PPM Server 34
- Upgrading SM Service Catalog-PPM Center Project Proposal Integration Solution40
- Customizing SM Project Proposal Catalog Item Fields42
- Troubleshooting52
- We appreciate your feedback!56

Chapter 1

Configuring Service Manager

The HP SM Service Catalog-PPM Center Project Proposal Integration Solution aims to submit project proposals from Service Manager to PPM Center, and feed back the proposal's status (rejection/approval) from PPM Center to Service Manager.

Before using the integration solution, you need to perform necessary configuration tasks in both Service Manager and PPM Center.

This chapter provides configuration information on the Service Manager side.

Supported Service Manager versions are listed below:

Product	Supported Versions
HP Service Manager	7.11, 9.2x and 9.3x

Prerequisite

The integration solution is based on the Service Manager Integration Suite (SMIS) framework. Make sure that the SMIS framework is installed in your Service Manager instance properly.

For detailed installation instructions about SMIS, see the *HP Service Manager Integration Suite User Guide* available at <Release_Package>/SMIS/doc/SMIS User Guide.pdf.

Note: For Service Manager 9.20 and above, the SMIS framework is available out-of-box, so you do not need to install it any more.

Configuring Service Manager

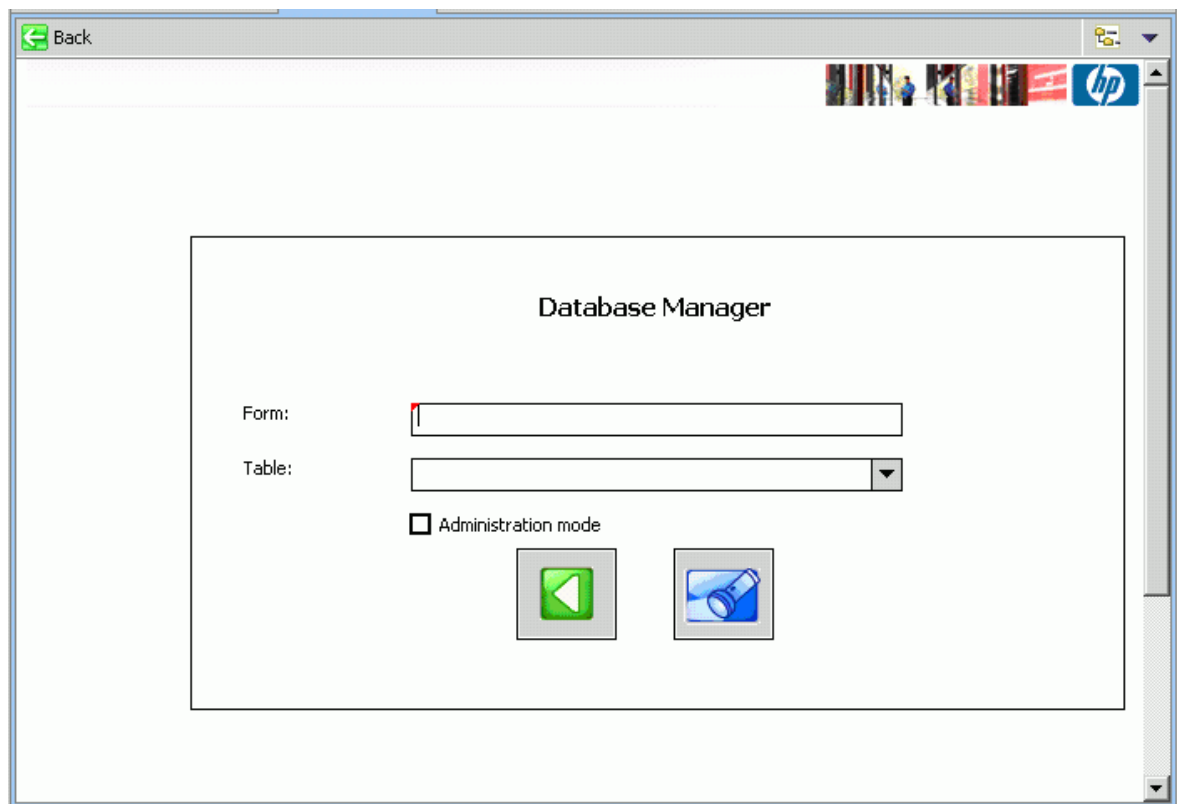
You need to first load the integration template into Service Manager, and then set up an integration instance based on this template; in addition, you need to add the Service Manager Web tier server URL to the system information record.

Loading the integration template unload file

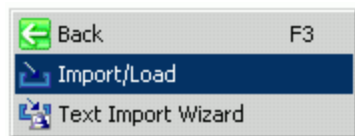
To load the template unload file for the integration solution, follow the steps below:

1. Log on to Service Manager as a System Administrator.
2. Type `db` in the command line and press **Enter**. The Database Manager logon page displays.

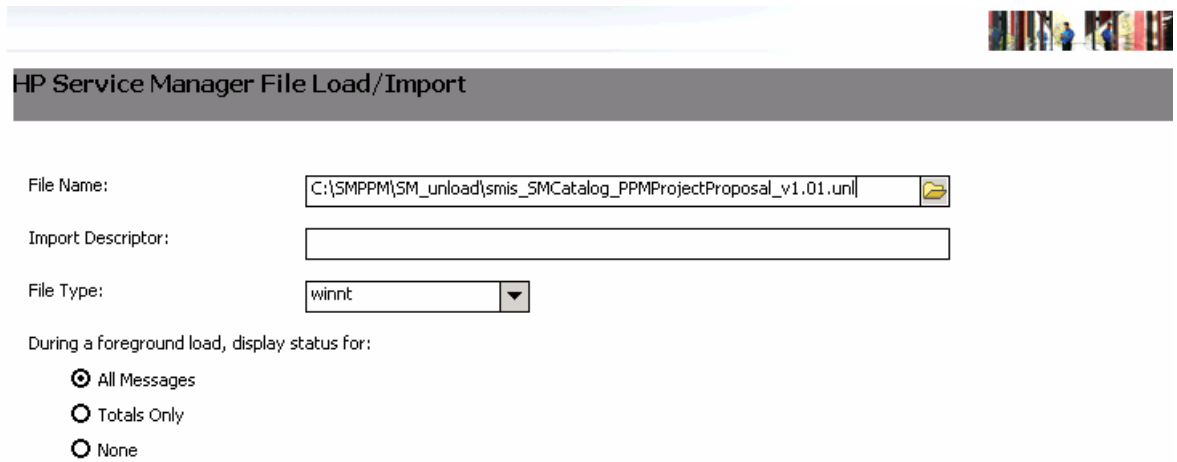
A screenshot of a command line interface. It shows a text input field containing the text 'db'. To the right of the input field is a blue arrow button pointing to the right.



3. Right click in the window and select **Import/Load** from the context menu. HP Service Manager File Load/Import page displays.



4. For the File Name field, browse to the <Release_Package>/SMPPM/SM_unload/smis_SMCatalog_PPMPProjectProposal_v1.01.unl file. For other fields and options, keep the default settings.



The image shows a screenshot of the 'HP Service Manager File Load/Import' dialog box. It has a title bar with the text 'HP Service Manager File Load/Import'. Below the title bar, there are several input fields and a radio button group. The 'File Name' field contains the text 'C:\SMPPM\SM_unload\smis_SMCatalog_PPMProjectProposal_v1.01.unl' and has a folder icon to its right. The 'Import Descriptor' field is empty. The 'File Type' dropdown menu is set to 'winnt'. Below these fields, there is a label 'During a foreground load, display status for:' followed by three radio button options: 'All Messages' (which is selected), 'Totals Only', and 'None'.

File Name: C:\SMPPM\SM_unload\smis_SMCatalog_PPMProjectProposal_v1.01.unl

Import Descriptor:

File Type: winnt

During a foreground load, display status for:

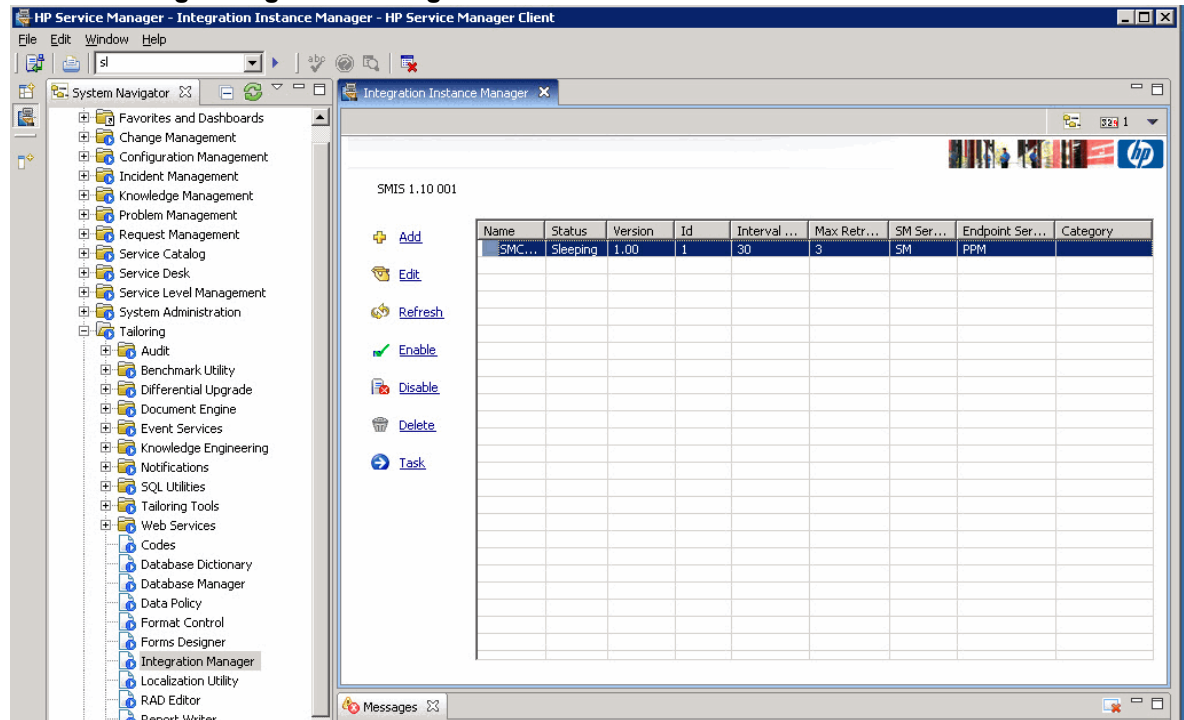
- ☒ All Messages
- ☐ Totals Only
- ☐ None

5. Click **Load FG**.
When the loading process completes successfully, the integration instance template is ready for you to create new integration instances.

Adding an integration instance

To add a new integration instance for the SM Service Catalog-PPM Project Proposal Integration Solution:

1. Log on to Service Manager as a System Administrator.
2. Go to **Tailoring > Integration Manager**.



3. Click **Add**. The Integration Template Selection page displays.
4. Select **SMCatalog_PPMPProposal** from the **Integration Template** list, and then select the **Import Mapping** check box.

Integration Template Selection

Select an integration template from dropdown list. If "Import Mapping" is checked, the out-of-box mapping will be imported from the integration template.

Integration Template:

☒ Import Mapping

5. Click **Next**. The Integration Instance Information page displays.
6. In the Integration Instance Information page, some fields are already populated with default settings provided with the template. Review the values and make changes as necessary. Provide values for other empty fields as required, for example, as shown in the screenshot

below.

The **Log File Directory** should exist on the Service Manager server, otherwise the log files will get lost.

Integration Instance Information

Name, Interval Time, Max Retry Times and Log File Directory are required. If "Run at system startup" is checked, the integration instance will start automatically when SM starts.

Name: SMCatalog_PPMPProposal Version: 1.0

Interval Time (s): 10 Max Retry Times: 10

SM Server: SM Endpoint Server: PPM

Log Level: DEBUG ☐ Support Real Time

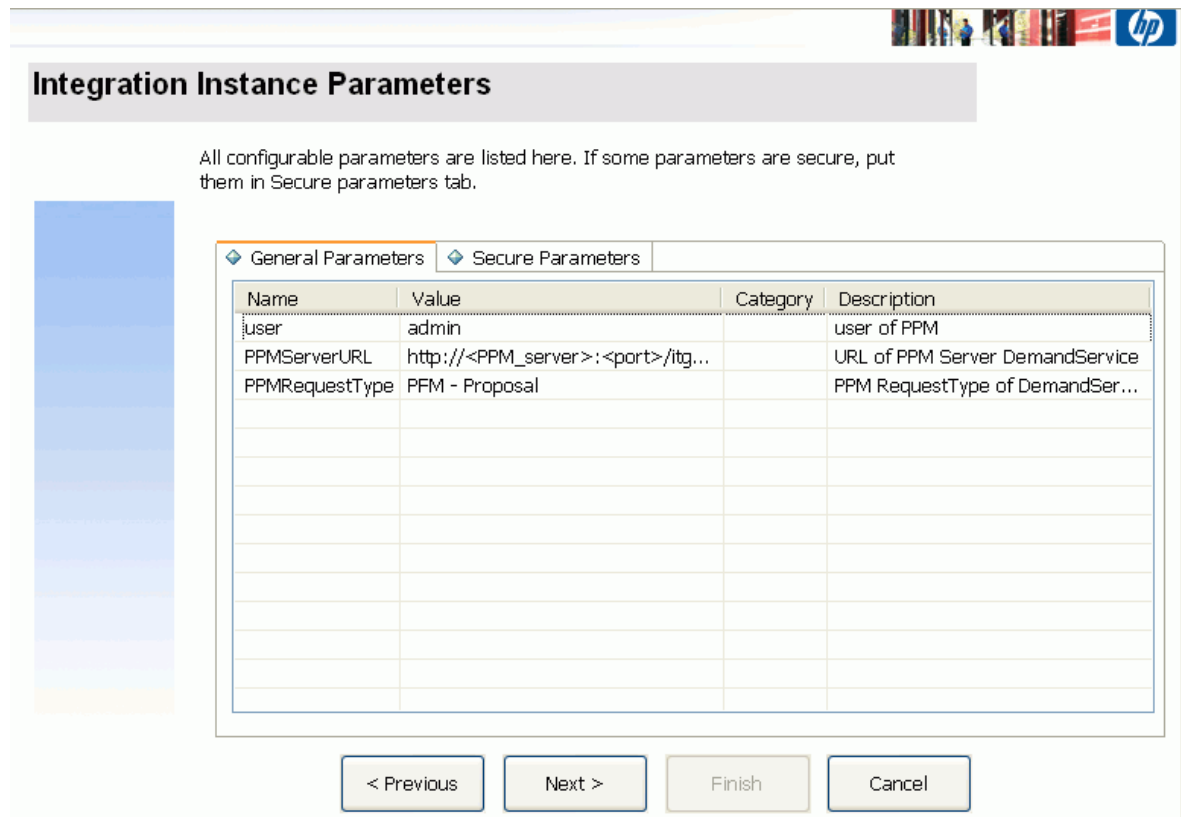
Log File Directory: c:\SMPPM ☒ Run at system startup

Description: SM Catalog - PPM Proposal Integration

< Previous Next > Finish Cancel

7. Click **Next**. The Integration Instance Parameters page displays.
8. In the **General Parameters** and **Secure Parameters** tabs, modify parameter values as described in the table below:

Parameter	Value
user	A PPM Center user account for Service Manager to connect to PPM Center, for example, admin .
PPMServerURL	http://<PPM_server>:<port>/itg/ppmservices/DemandService For example, http://example.domain.com:8080/itg/ppmservices/DemandService.
PPMRequestType	PPM Request Type, for example, PFM-Proposal.
password	Password of the PPM Center user account for Service Manager to connect to PPM Center.



Integration Instance Parameters

All configurable parameters are listed here. If some parameters are secure, put them in Secure parameters tab.

Name	Value	Category	Description
user	admin		user of PPM
PPMServerURL	http://<PPM_server>:<port>/itg...		URL of PPM Server DemandService
PPMRequestType	PFM - Proposal		PPM RequestType of DemandSer...

< Previous Next > Finish Cancel

9. Click **Next**. The Integration Instance Fields page displays.
10. In the Integration Instance Fields page, you can see pre-defined SM Fields and PPM Center (Endpoint) Fields provided with the integration instance template. You can modify or delete these fields or add new fields as necessary.

Integration Instance Fields

All fields for both SM and Endpoint of the integration are listed here. Please put SM fields in SM Fields tab, endpoint fields in Endpoint Fields

SM Fields

Endpoint Fields

Field Name	Field Type	Description
CallID	string	
PlannedStart	string	
PlannedEnd	string	
ProjectName	string	
ProjectManager	string	
Region	string	
ProjectType	string	
ProjectDescription	string	
BusinessUnit	string	

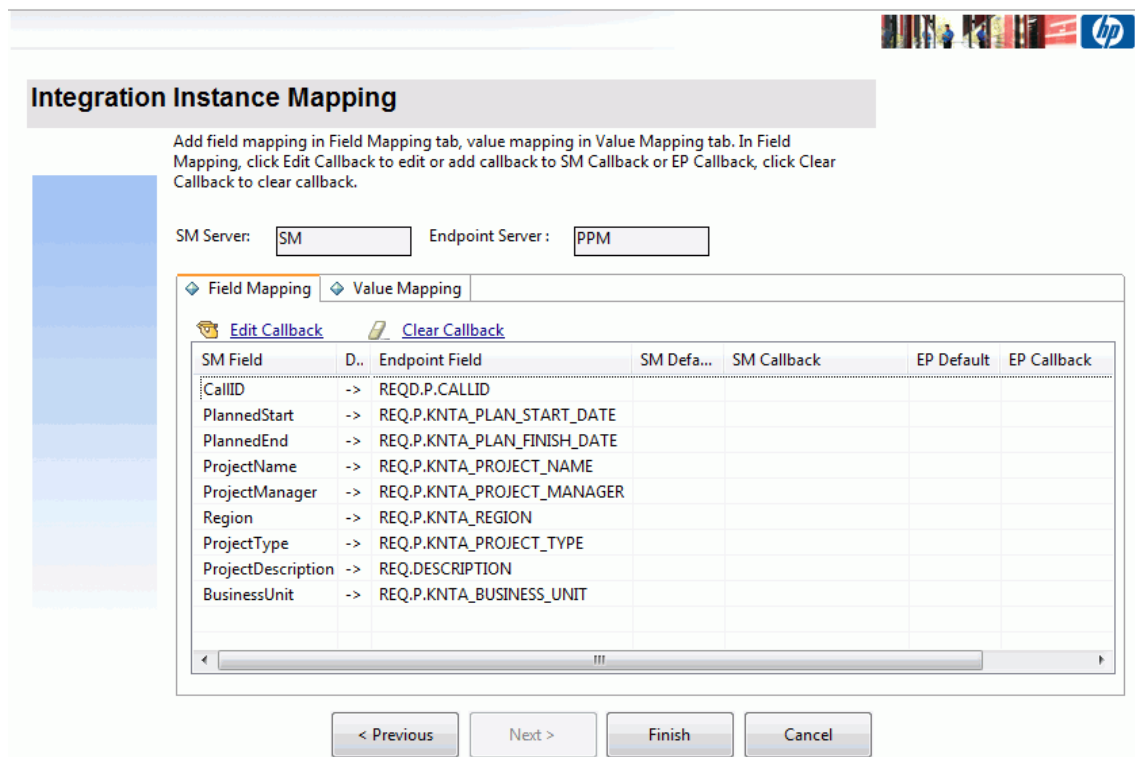
< Previous

Next >

Finish

Cancel

11. Click **Next**. The Integration Instance Mapping page displays.
12. In the Integration Field Mapping page, you can see pre-defined mappings between SM Fields and PPM Center (Endpoint) Fields.
You can modify the pre-defined field mappings and value mappings between SM fields and PPM Center fields. You can also add your own field mappings and value mappings.



Integration Instance Mapping

Add field mapping in Field Mapping tab, value mapping in Value Mapping tab. In Field Mapping, click Edit Callback to edit or add callback to SM Callback or EP Callback, click Clear Callback to clear callback.

SM Server: Endpoint Server:

Field Mapping | Value Mapping

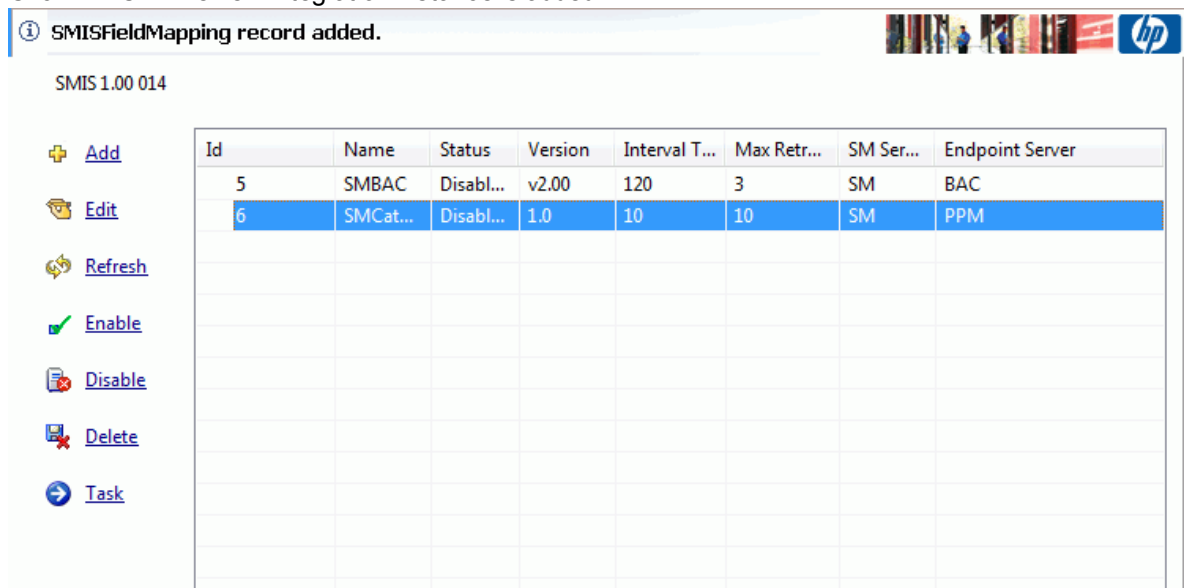
[Edit Callback](#) [Clear Callback](#)

SM Field	D..	Endpoint Field	SM Defa...	SM Callback	EP Default	EP Callback
CallID	->	REQD.P.CALLID				
PlannedStart	->	REQ.P.KNTA_PLAN_START_DATE				
PlannedEnd	->	REQ.P.KNTA_PLAN_FINISH_DATE				
ProjectName	->	REQ.P.KNTA_PROJECT_NAME				
ProjectManager	->	REQ.P.KNTA_PROJECT_MANAGER				
Region	->	REQ.P.KNTA_REGION				
ProjectType	->	REQ.P.KNTA_PROJECT_TYPE				
ProjectDescription	->	REQ.DESCRPTION				
BusinessUnit	->	REQ.P.KNTA_BUSINESS_UNIT				

< Previous Next > Finish Cancel

For detailed instructions on configuring field mappings and value mappings, see the *HP Service Manager Integration Suite User Guide* (<Release_Package>/SMIS/doc/SMIS User Guide.pdf).

- Click **Finish**. The new integration instance is added.



SMISFieldMapping record added.

SMIS 1.00 014

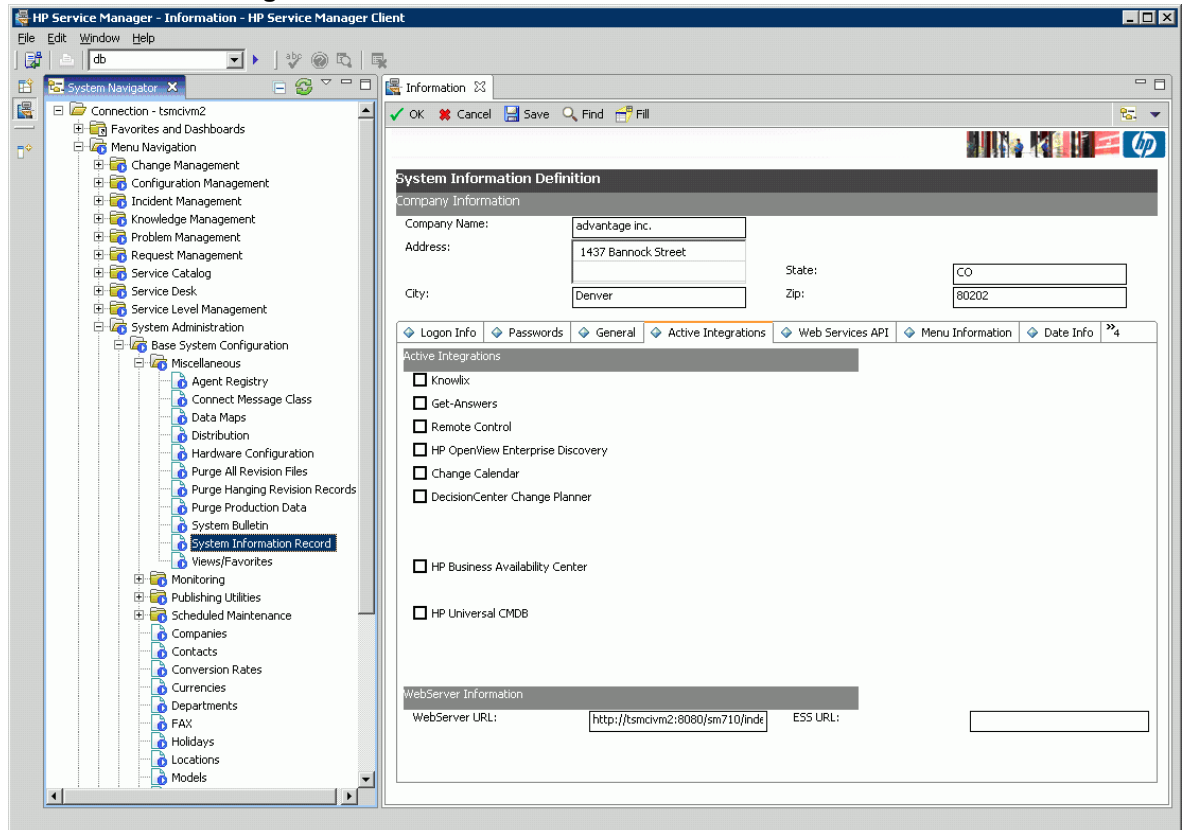
[Add](#)
[Edit](#)
[Refresh](#)
[Enable](#)
[Disable](#)
[Delete](#)
[Task](#)

Id	Name	Status	Version	Interval T...	Max Retr...	SM Ser...	Endpoint Server
5	SMBAC	Disabl...	v2.00	120	3	SM	BAC
6	SMCat...	Disabl...	1.0	10	10	SM	PPM

- With the new integration instance highlighted, click **Enable** or **Disable** to enable or disable the new HP SM Service Catalog-PPM Center Project Proposal Integration Solution instance.

Configuring the Service Manager Web tier server URL

1. Log on to Service Manager as a System Administrator.
2. Go to **System Administration > Base System Configuration > Miscellaneous > System Information Record**.
3. Select the **Active Integrations** tab.



4. In the WebServer URL field, enter the URL of the Service Manager Web tier application server, for example, `http://tsmci2:8080/sm711/index.do`.

Note: Do not enter `localhost` as the Web tier server address even if the Web tier application server is on the same host machine as the Service Manager server is on. The Web tier server address must be the real hostname or IP address of the host machine.

5. Click **Save**.

Chapter 2

Configuring PPM Center

This chapter provides configuration information on the PPM Center side, including configuration of the PPM Workbench and the PPM Server.

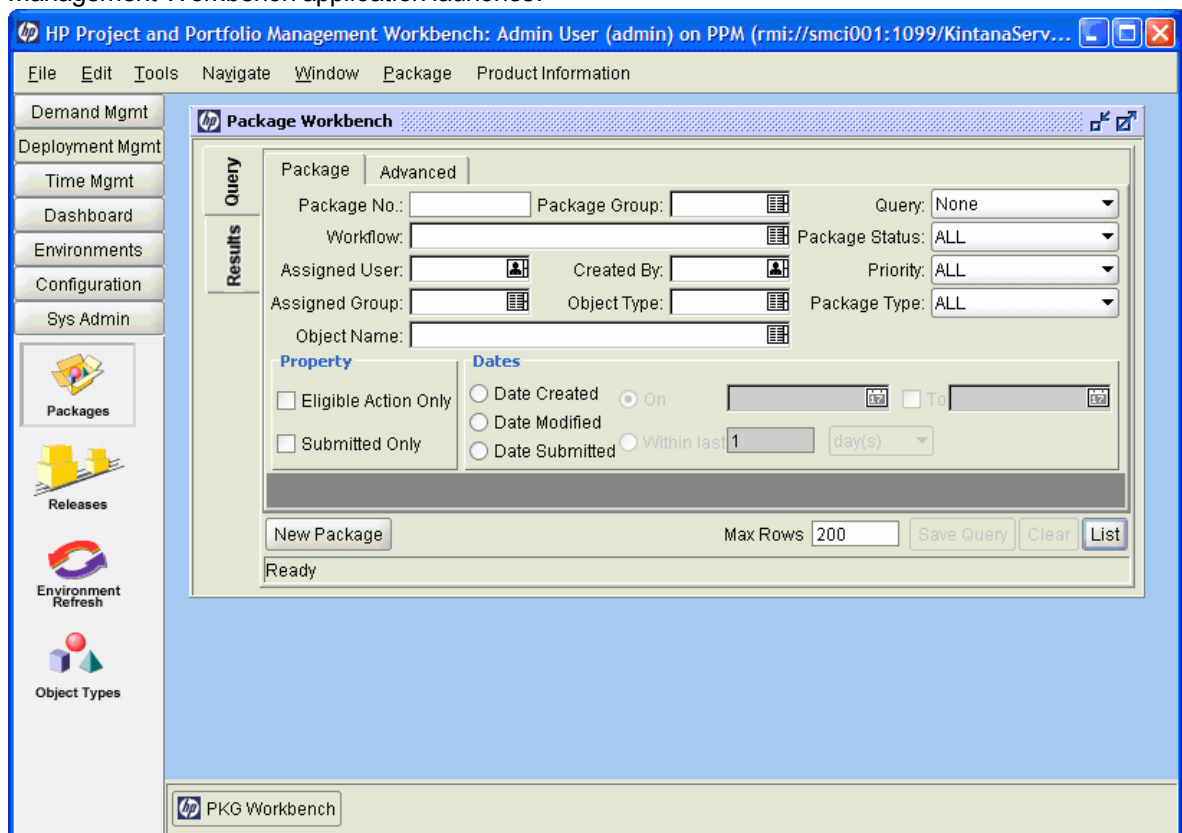
Supported PPM Center versions are listed below:

Product	Supported Versions
PPM Center	7.50, 8.0x and 9.1x

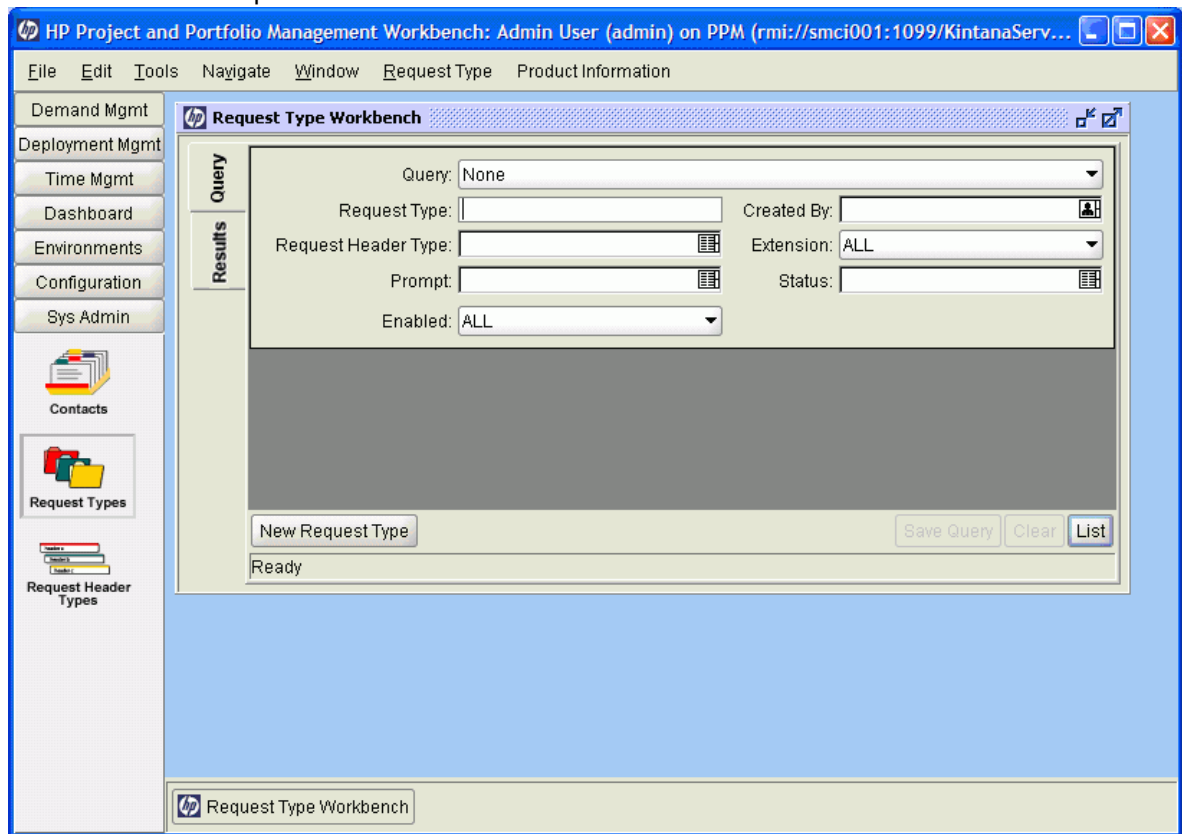
Configuring the PPM Workbench

Perform the following steps to configure the PPM Workbench:

1. Log on to PPM Center as an administrator.
2. In the navigation pane, go to **Administration > Open Workbench**. The Project and Portfolio Management Workbench application launches.



3. In the left navigation pane, click **Demand Mgmt > Requets Types**. The Request Type Workbench window opens.



4. Click **List** to list all request types in PPM Center.

HP Project and Portfolio Management Workbench: Admin User (admin) on PPM (rmi://smci001:1099/KintanaServ...)

File Edit Tools Navigate Window Request Type Product Information

Demand Mgmt
Deployment Mgmt
Time Mgmt
Dashboard
Environments
Configuration
Sys Admin

Contacts
Request Types
Request Header Types

Request Type Workbench

Request Type	Description	Enabled
Bug	Bug Request type	Y
DEM - Application Bug	Application bugs should be used to report problem...	Y
DEM - Application Enhancement	Application Enhancements should be used to requ...	Y
DEM - Database Refresh	Database refresh requests can be made for all IT O...	Y
DEM - Initiative	Initiative request should be used to request key proj...	Y
Enhancement	Enhancement Request type	Y
Generic Request	General-purpose request tracking	Y
PFM - Asset	Assets should be used to add such things as Prod...	Y
PFM - Project	Projects should be used to initiate an approved pro...	Y
PFM - Proposal	Proposals should be used to request a new Project...	Y
Program Issue	A standard Request Type for logging program Issues	Y
Project Details	Basic set of detailed project information.	Y
Project Issue	A standard Request Type for logging project Issues	Y
Project Risk	Request type for entering project risk information	Y

New Open Copy Delete Refresh Setup Request Header

21 Record(s) loaded.

Request Type Workbench

5. Double-click the **PFM-Proposal** entry, or select it and then click **Open**.

Request Type : PFM - Proposal

Request Type Name: PFM - Proposal

Creation Action Name: PFM - Proposal

Category: [Dropdown]

Extension: [Dropdown]

Description: Proposals should be used to request a new Project to be approved and added to the Portfolio.

Meta Layer View: MREQ_ PFM_PROPOSAL

Max Fields: 50 Enabled: ☒ Yes ☐ No

Workflows User Access Notifications User Data Ownership Help Content Resources

Fields Layout Display Columns Request Status Status Dependencies Rules Commands Sub-Types

Prompt	Token	Enabled	Component Type	Valid
Summary				
Proposal Details				
Business Case Details				
Value Ratings				
Risk Ratings				
Request Type Fields				

+ All - All New Edit Remove

OK Save Cancel

Ready


6. Go to the **Fields** tab and click **New**. Add a new field **CallID** for the PFM-Proposal Request Type, and provide values for required fields as shown below.

Field: CallID:

Field Prompt: Token:

Description:

Enabled: ☒ Yes ☐ No

Validation: 

New Open

Component Type:


Multi-Select Enabled: ☐ Yes ☒ No

Attributes | Default | Storage | Security

Section Name: Display Only: ☐ Yes ☒ No

Transaction History: ☐ Yes ☒ No Notes History: ☐ Yes ☒ No

Display on Search and Filter: ☐ Yes ☒ No Display: ☐ Yes ☒ No

Search Validation: 

Open

OK Apply Cancel

Ready

Request Type : PFM - Proposal

Request Type Name: PFM - Proposal
Creation Action Name: PFM - Proposal
Category:
Extension:
Description: Proposals should be used to request a new Project to be approved and added to the Portfolio.
Meta Layer View: MREQ_ PFM_PROPOSAL
Max Fields: 50 Enabled: ☒ Yes ☐ No

Workflows User Access Notifications User Data Ownership Help Content Resources
Fields Layout Display Columns Request Status Status Dependencies Rules Commands Sub-Types

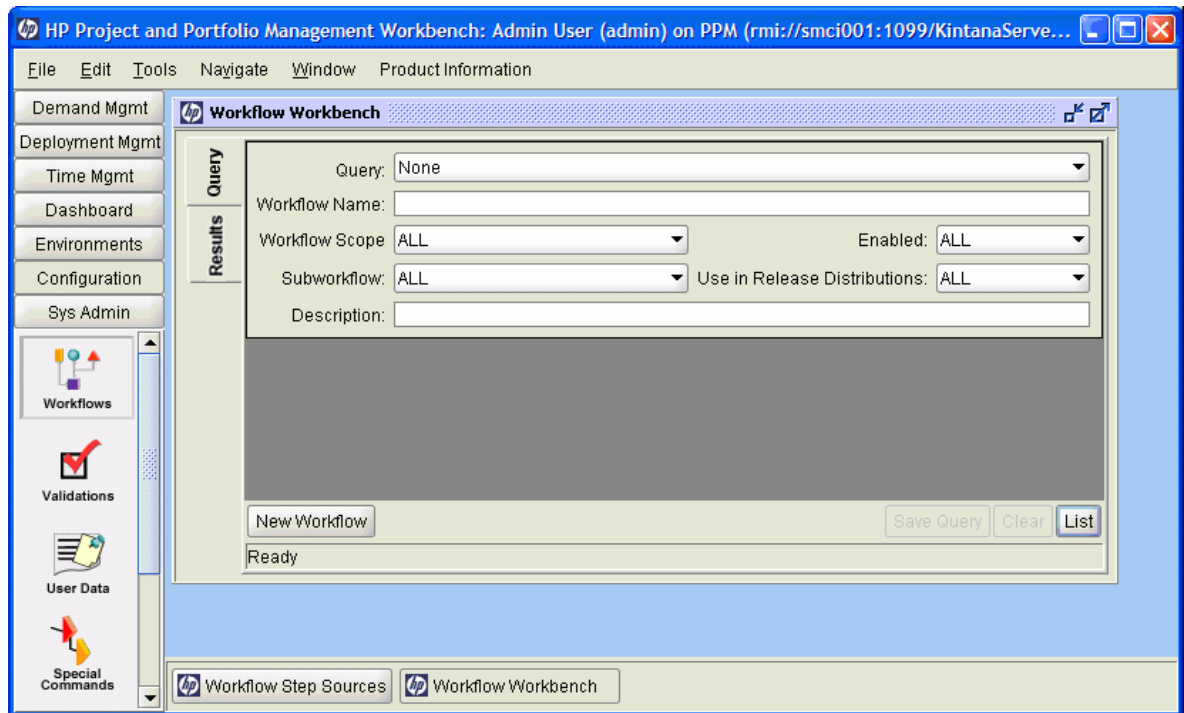
Prompt	Token	Enabled	Component Type	Value
Summary				
Proposal Details				
Business Case Details				
Value Ratings				
Risk Ratings				
Request Type Fields				
CallID:	CALLID	Y	Text Field	Text Field - 10

+ All - All New Edit Remove

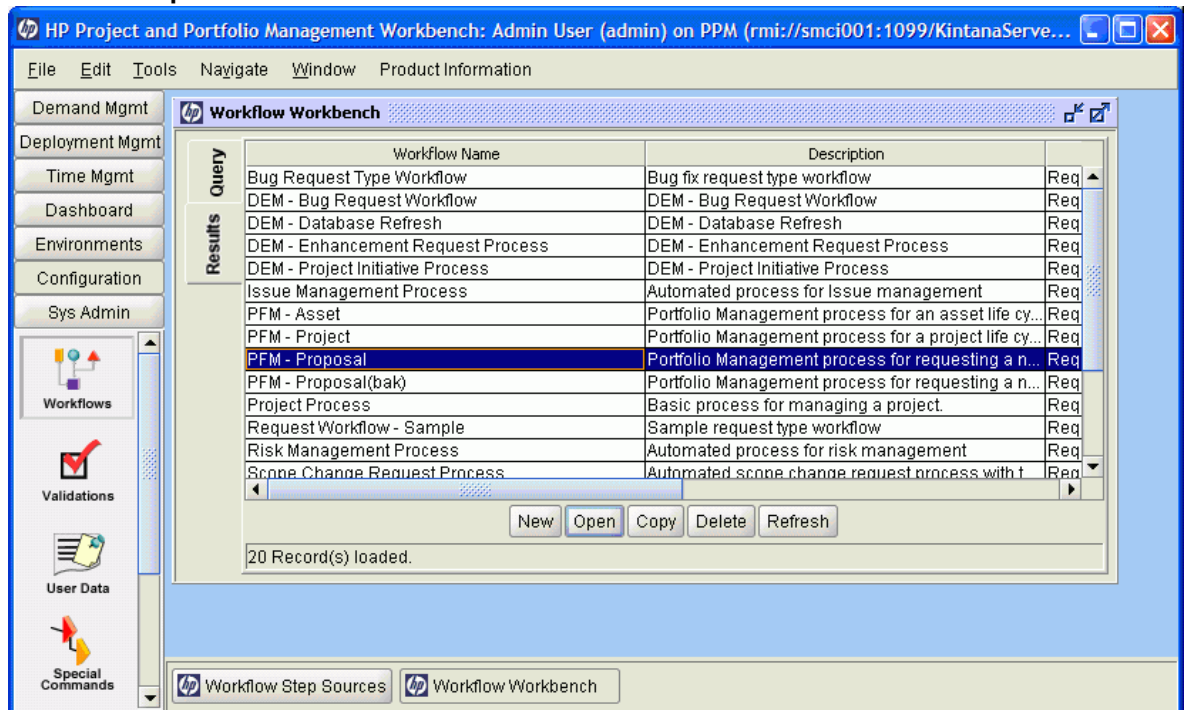
OK Save Cancel

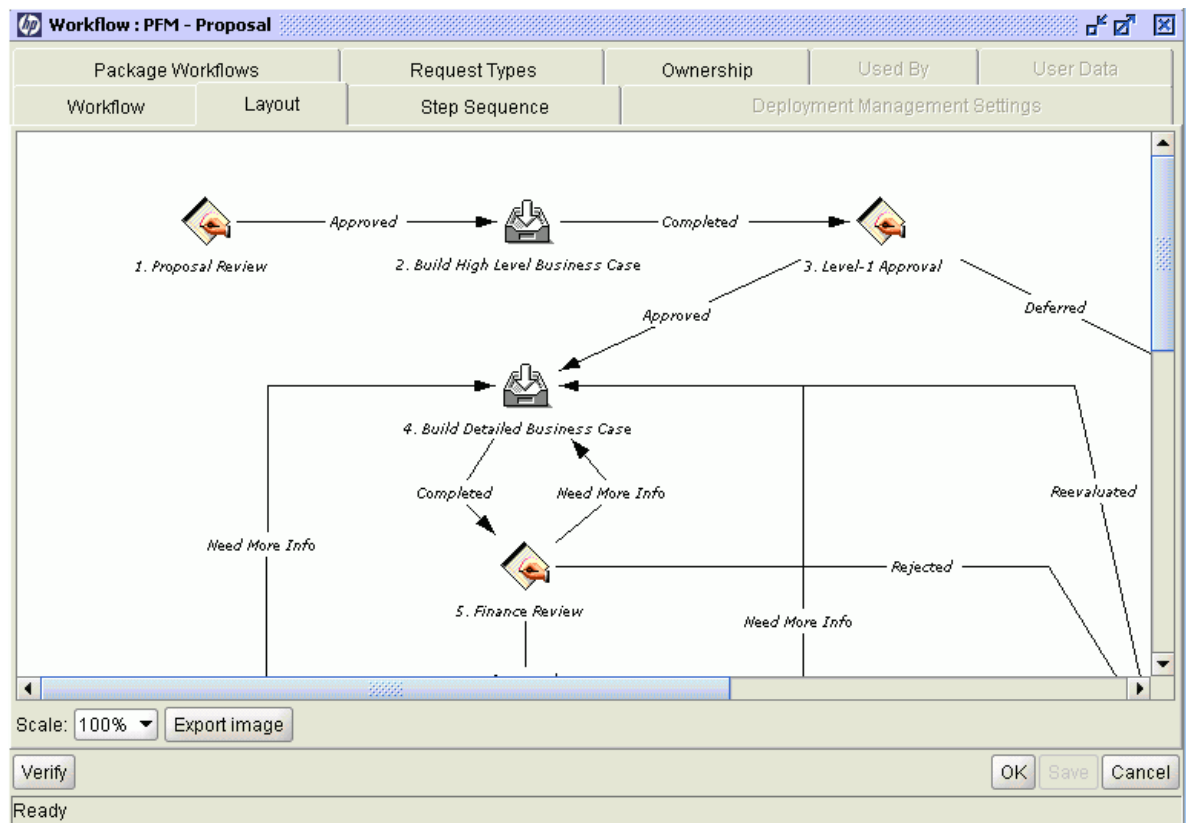
Ready

7. Click **OK** to save the modification.
8. In the left navigation pane, click **Configuration > Workflows** to launch the Workflow Workbench window.

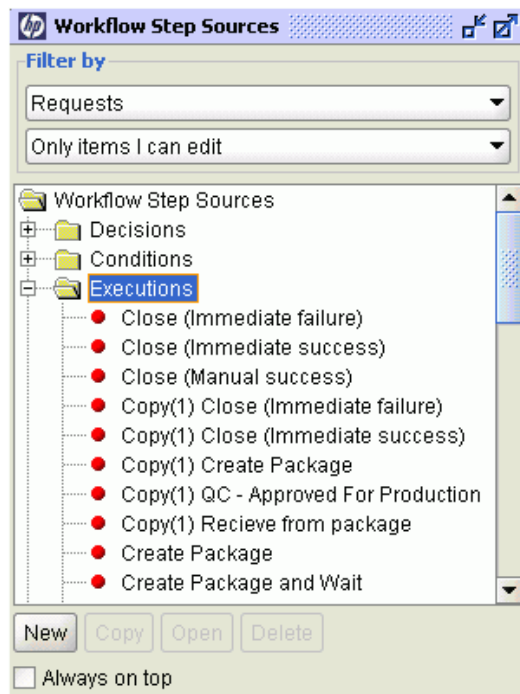


9. Click **List** to list all workflows. Locate the **PFM-Proposal** entry from the list, and double-click on it or click **Open**.





10. In the Workflow Step Sources sub-window, select the **Executions** node in the Workflow Step Sources item tree.



11. Click **New** to create a new workflow step source `SMCatalog_Reject`.

The screenshot shows the 'Execution' configuration window for a new workflow step source named 'SMCatalog_Reject'. The window has tabs for 'Execution', 'Ownership', 'User Data', and 'Used By'. The 'Execution' tab is active, showing various configuration fields:

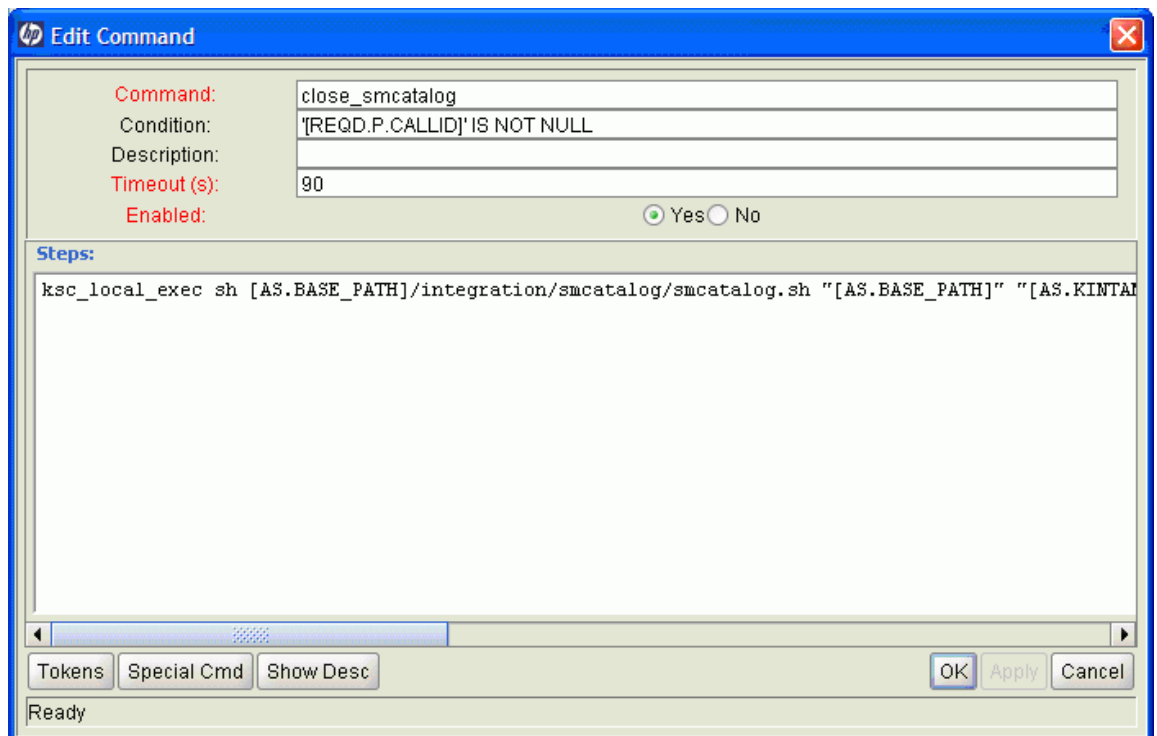
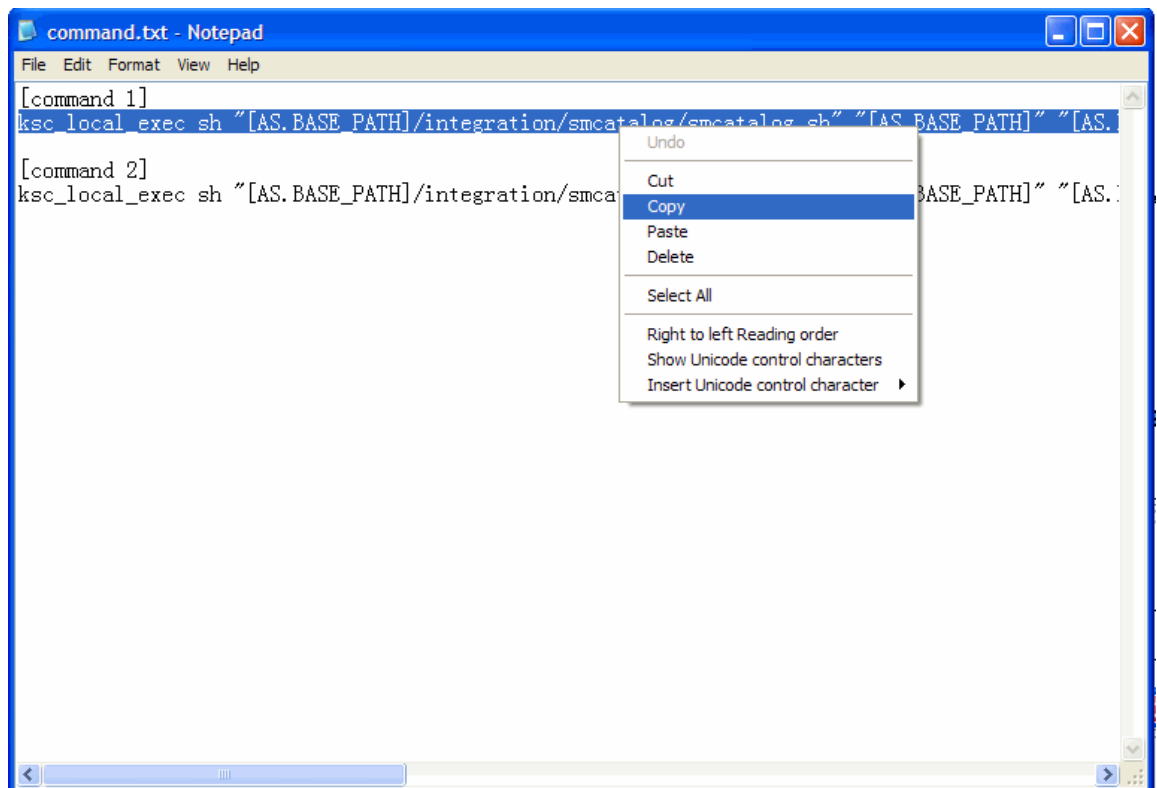
- Name:** SMCatalog_Reject
- Workflow Scope:** Requests
- Description:** (empty text box)
- Execution Type:** Workflow Step Commands
- Workflow Event:** None
- Validation:** WF - Standard Execution Results (with a 'New' button and an 'Open' button)
- Timeout:** (empty text box) Days
- Icon:** (empty text box)
- Processing Type:** Immediate
- Enabled:** ☒ Yes ☐ No
- Page Response:**
 - ☒ Finish Execution before displaying the request page to the user
 - ☐ Display the request page immediately while execution is still running
- Execution:**
 - Commands:** A table with two columns: 'Command' and 'Condition'. It contains one entry: 'close_smcatalog' with condition '[REQD.P.CALLID]' IS NOT NULL.
 - Command Steps:** A text area containing the command: `ksc_local_exec sh [AS.BASE_PATH]/integration/smcatalog/smcatalog.sh "[REQD.P.CALLID]"`

At the bottom of the 'Execution' section, there are buttons: '+ All', '= All', 'New Cmd', 'Edit Cmd', 'Copy Cmd', 'Remove', and up/down arrow buttons. At the bottom of the window, there are 'Verify', 'OK', 'Save', and 'Cancel' buttons. The status bar at the very bottom says 'Ready'.

12. Click **New Cmd** to add a new command, and provide values for the corresponding fields:

- **Command:** `close_smcatalog`
- **Condition:** `'[REQD.P.CALLID]' IS NOT NULL`
- **Command Steps:** Locate the script with the `[command 1]` marker in `command.txt`, then copy and paste the entire section of script directly to this field.

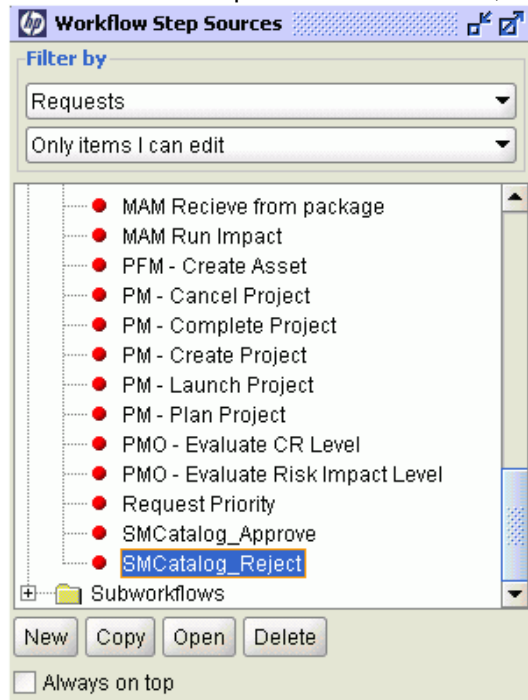
Note: To facilitate your configuration effort, all scripts that may cause errors during your copy and paste operation are provided in `command.txt` under the `<SMPPMIntegration_installDir>\doc` directory.



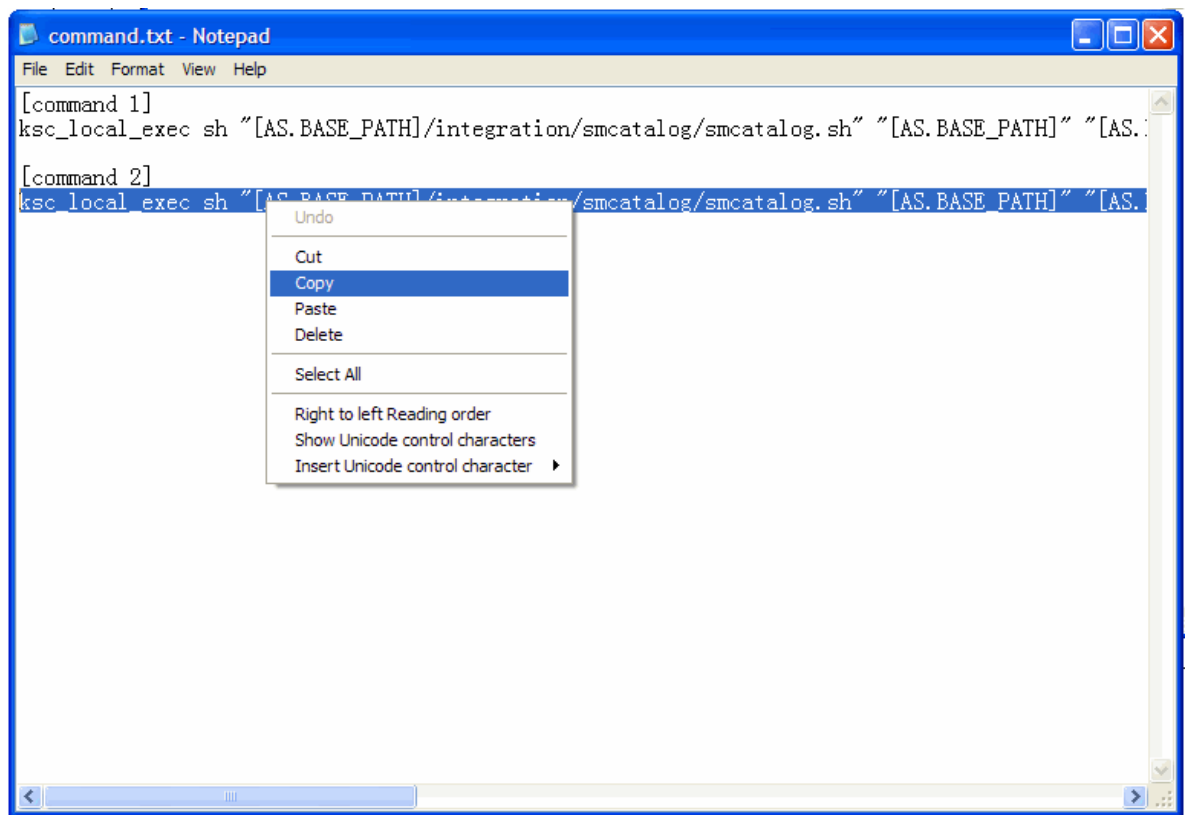
The following is the detailed script ([command 1] in command.txt):

```
ksc_local_exec sh "[AS.BASE_PATH]/integration/smcatalog/smcatalog.sh"  
"[AS.BASE_PATH]" "[AS.KINTANA_SERVER_NAME]"  
"[AS.SM_URL]/sc62server/PWS/ServiceDeskForPPM"  
"[AS.SM_USERNAME]" "[AS.SM_PASSWORD]"  
"[REQD.P.CALLID]" "Request Rejected"  
"Proposal has been rejected."
```

13. In the Workflow Step Sources sub-window, select the newly added SMCatalog_Reject item.



14. Click **Copy** to create a new workflow step source SMCatalog_Approve. Locate the script with the [command 2] marker in command.txt, then copy and paste the entire section of script directly to the **Command Steps** field.



Execution | Ownership | User Data | Used By

Name SMCatalog_Approve **Workflow Scope** Requests

Description

Execution Type Workflow Step Commands **Workflow Event** None

Validation WF - Standard Execution Results **Timeout** Days

Processing Type Immediate **Enabled:** ☒ Yes ☐ No

Page Response ☒ Finish Execution before displaying the request page to the user
☐ Display the request page immediately while execution is still running

Execution:

Command	Condition
close_smcatalog	[REQD.P.CALLID] IS

Command Steps

ksc_local_exec sh [AS.BASE_PATH]/integration/smcatalog/smcatalog.sh "[A

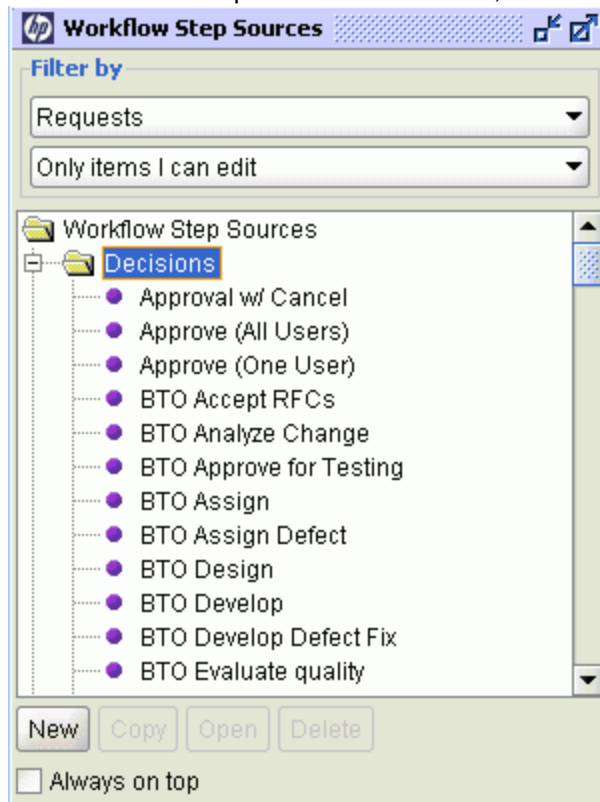
Buttons: +All, -All, New Cmd, Edit Cmd, Copy Cmd, Remove, Up, Down, Verify, OK, Save, Cancel

Ready

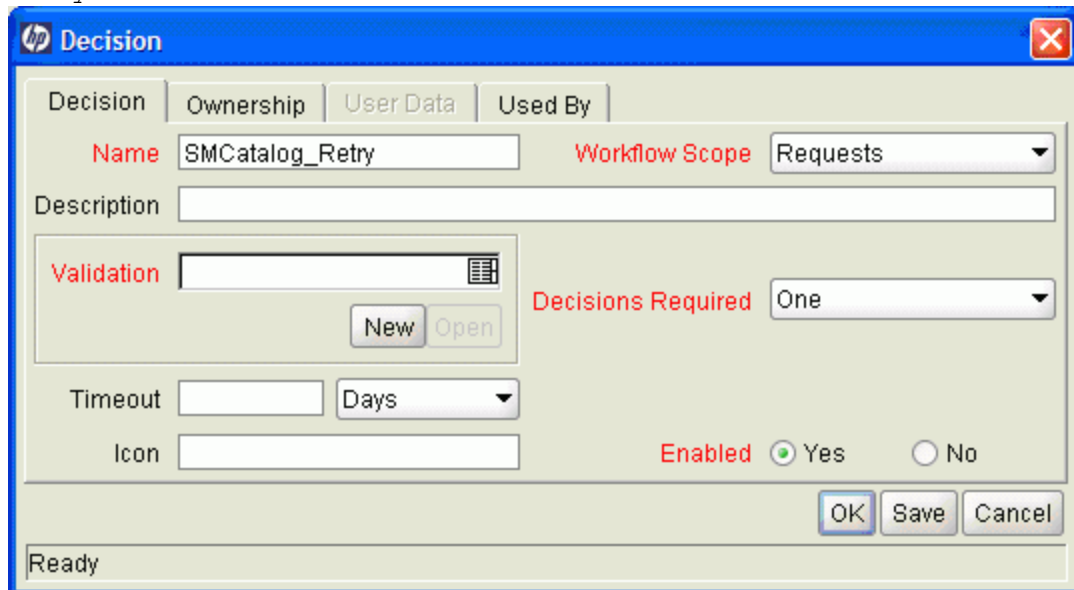
The following is the detailed script ([command 2] in command.txt):

```
ksc_local_exec sh "[AS.BASE_PATH]/integration/smcatalog/smcatalog.sh"
"[AS.BASE_PATH]" "[AS.KINTANA_SERVER_NAME]"
"[AS.SM_URL]/sc62server/PWS/ServiceDeskForPPM"
"[AS.SM_USERNAME]" "[AS.SM_PASSWORD]"
"[REQD.P.CALLID]" "Proposal approved"
"Proposal has been approved."
```

15. In the Workflow Step Sources sub-window, select the **Decisions** node.



16. Click **New**. In the Decision dialogue box, create a new workflow step source `SMCatalog_Retry`.



17. For the Validation field, click **New** to create a new validation `SMCatalog_Retry` for the `SMCatalog_Retry` workflow step resource, and click **New** to add two entries in Validation Values as shown below.

Validation : SMCatalog_Retry

Name: SMCatalog_Retry

Description:

Enabled: ☒ Use in Workflow? ☒

Component Type: Drop Down List

Validated By: List

Validation Values:

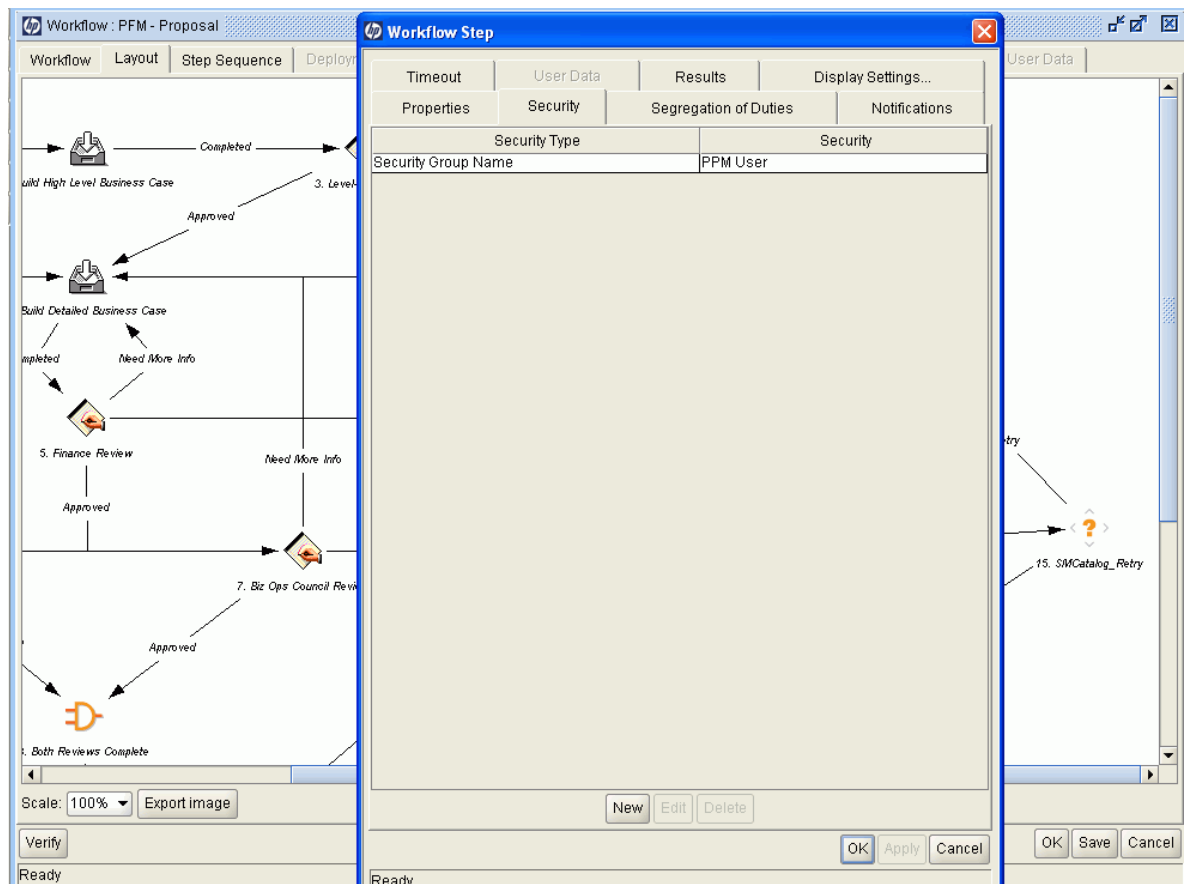
Seq	Code	Meaning	Description	Enabled	Default
1	RETRY	Retry	Retry when failed	Y	N
2	SKIP	Skip	Skip when failed	Y	N

New Edit Delete Copy From ↑ ↓

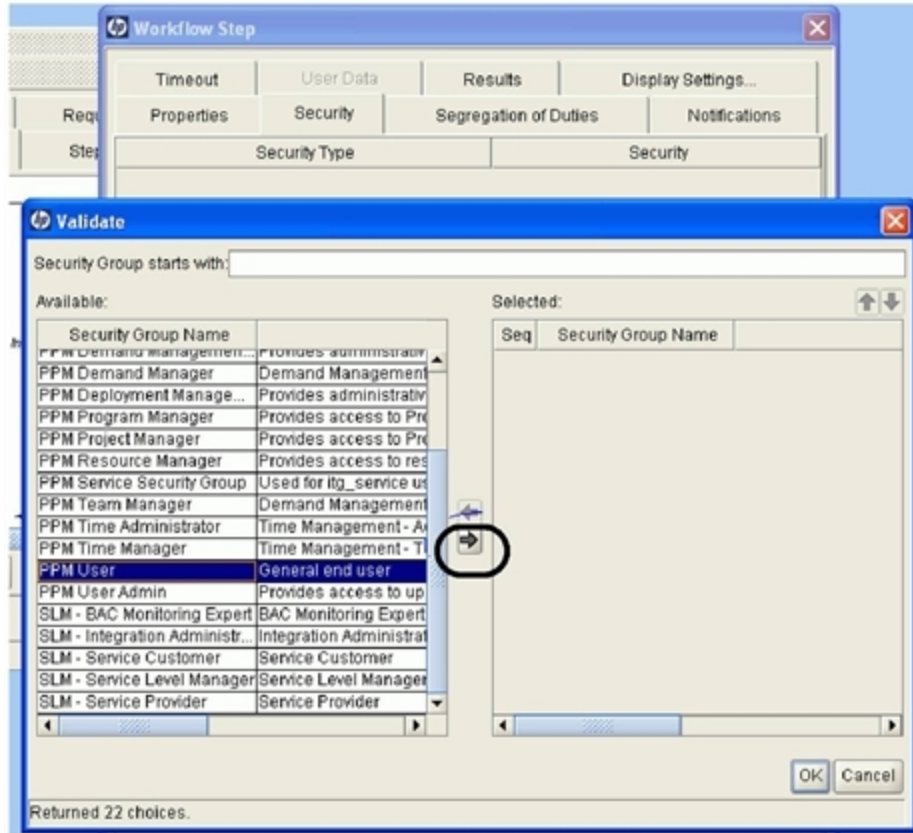
Used By Ownership OK Save Cancel

Ready

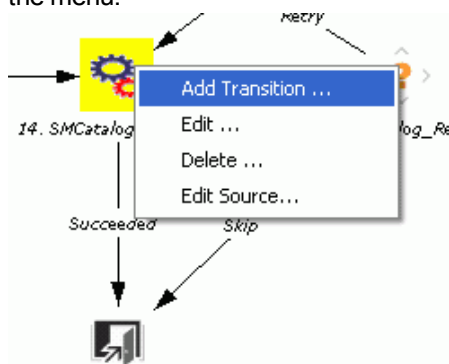
18. In the PFM–Proposal sub-window, drag-and-drop the newly added workflow step resources `SMCatalog_Reject`, `SMCatalog_Approve`, and `SMCatalog_Retry` from the Workflow Step Sources sub-window to the PFM–Proposal workflow. The Workflow Step window pops up.

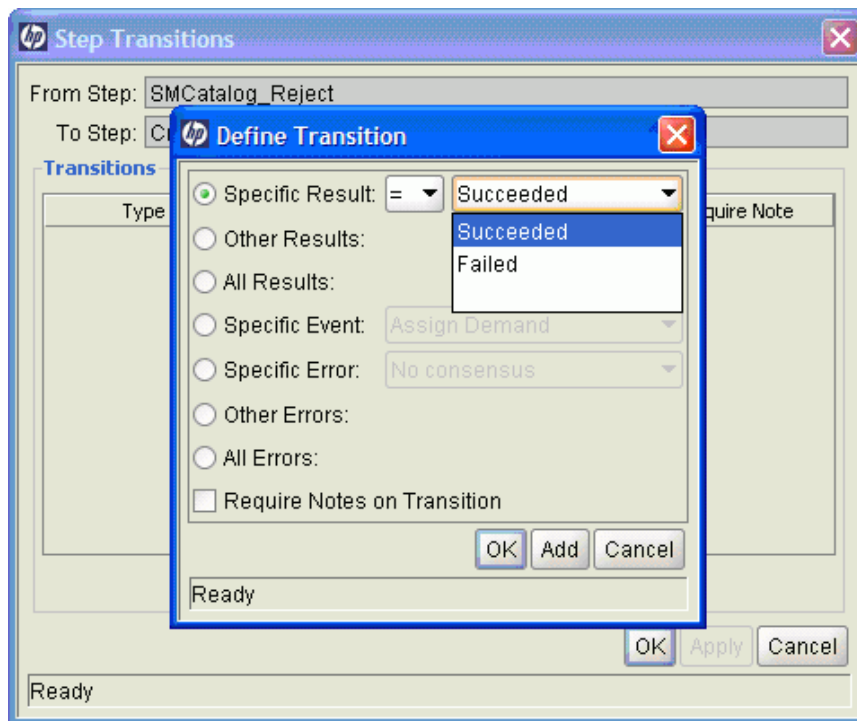


- Click **Security** and then click **New**. For the Security Group field, select **PPM User** from the pop-up window and click the right arrow to add **PPM User** to Security Group.

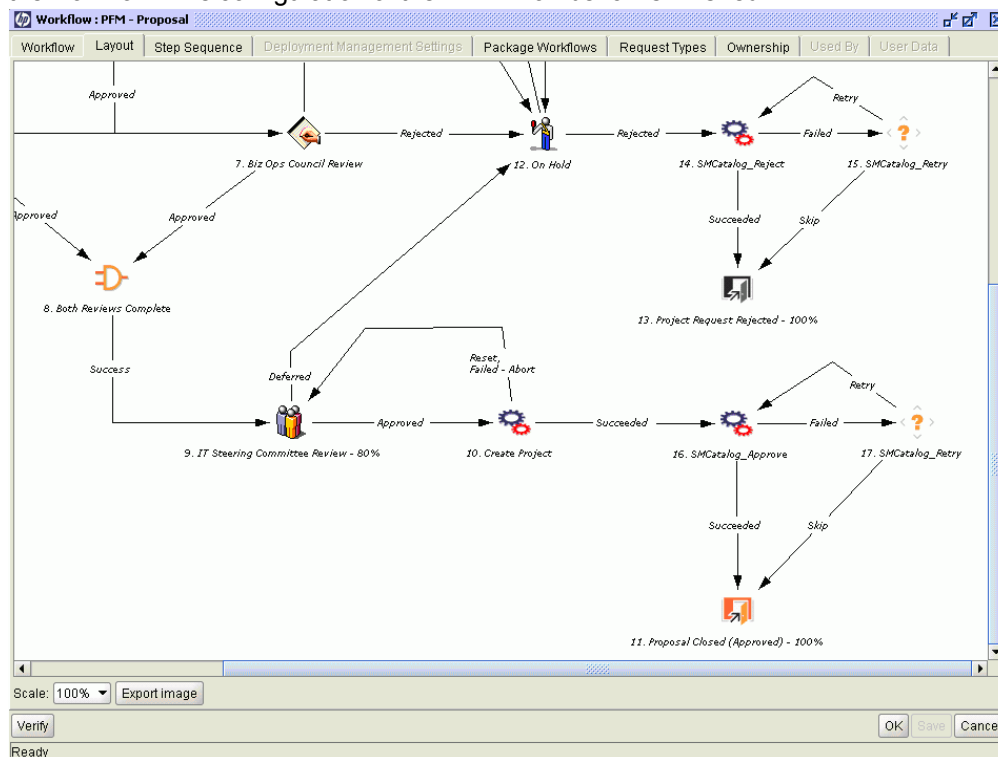


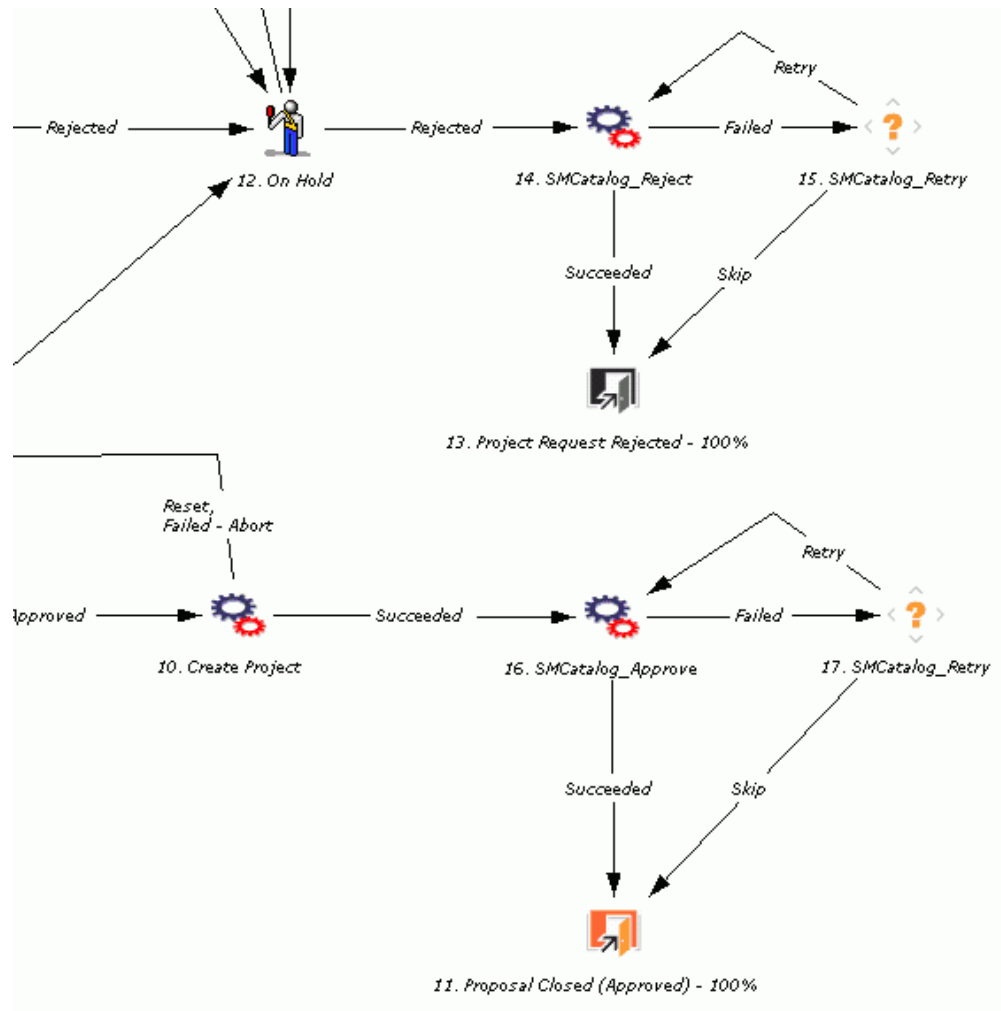
20. Click **OK** in the Validate and Workflow Step windows. PPM User is added to Security Group.
21. To add transitions between workflow steps, right-click a step, and select **Add Transition** from the menu.





22. After adding all the steps in the PFM–Proposal workflow, click **Save** to save the modification to the workflow. The configuration of the PPM Workbench is finished.

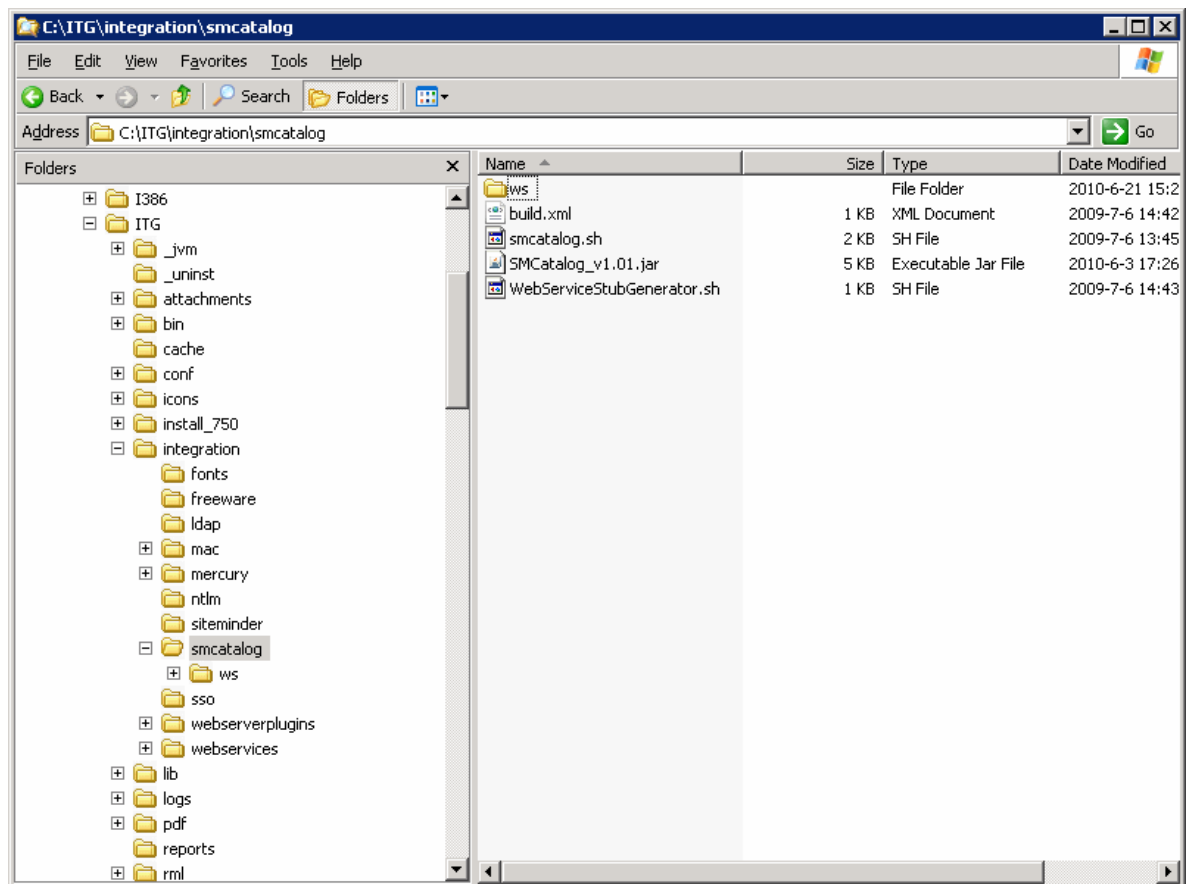




Configuring the PPM Server

Perform the following steps to configure the PPM server:

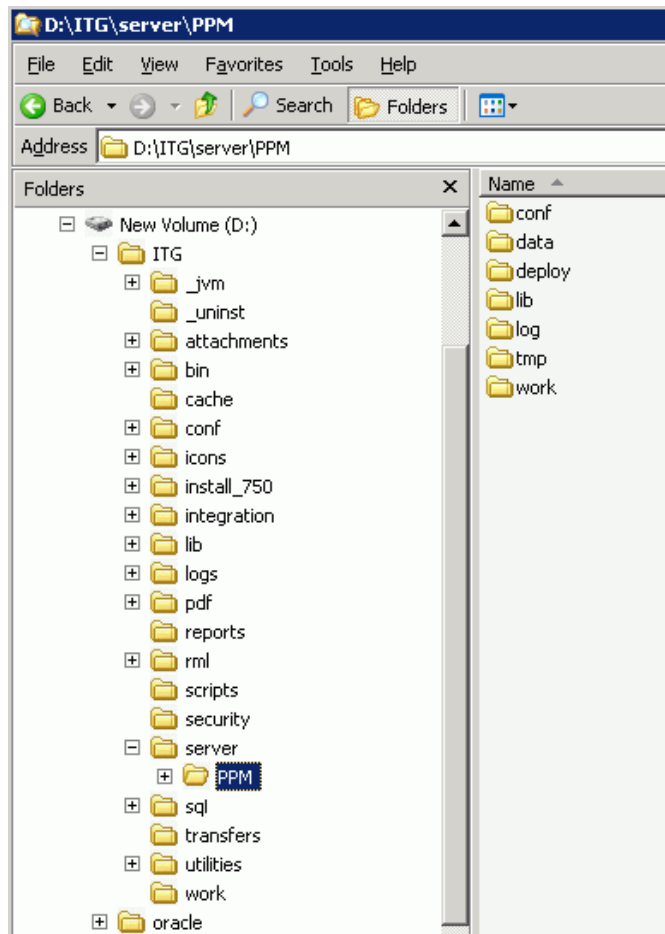
1. Create a folder `smcatalog` under `<PPM_HOME>\integration`. For example, `C:\ITG\integration\smcatalog`, and copy the `SMCatalog_v1.01.jar`, `smcatalog.sh`, `WebServiceStubGenerator.sh` and `build.xml` to the `smcatalog` folder.



2. Run the WebServiceStubGenerator.sh file to generate Web Service Interface stub files.
 - **Enter PPM Server Name:** Enter the PPM Server name.

Note: The PPM Server name can be found under <PPM_HOME>\server\. If the PPM server name can not be recognized, run the following command line before this step:

```
dos2unix -o *.sh
```



- **Enter WSDL URL:** Enter the SM WSDL ServiceDeskForPPM URL `http://<SM Server Address>:<port>/sc62server/PWS/ServiceDeskForPPM.wsdl`. For example, `http://smsserver01:13080/sc62server/PWS/ServiceDeskForPPM.wsdl`.
- **Enter Service Name:** Enter Web Service name **ServiceDeskForPPM**.

Note: Make sure that Ant is installed and environment variable ANT_HOME is correctly set in your environment.

3. Open the `server.conf` file in the PPM Center installation root path (for example, `c:\ITG\server.conf`) in a text editor.
 - a. Set the `com.kintana.core.server.ENABLE_WEB_SERVICES` to `true` to support the Web Service function in PPM Center.

```
com.kintana.core.server.ENABLE_WEB_SERVICES=true
```

- b. Add the following to the end of the `server.conf` file:

```
com.kintana.core.server.SM_URL=http://<SM server address>:<port>
```

```
com.kintana.core.server.SM_USERNAME=<SM user account>
```

```
com.kintana.core.server.SM_PASSWORD=<SM user account password>
```

Replace the italic content in < > with actual values of the Service Manager server and user account information which will be integrated with PPM Center.

Example

```
com.kintana.core.server.SM_URL=http://tvm001:13080
```

```
com.kintana.core.server.SM_USERNAME=falcon
```

```
com.kintana.core.server.SM_PASSWORD=#!#1&a&K8Ex0X~o<0./  
2w+VuhR02|w*yb0IoS?6e5UNv0>IueM~e=Hg~=w?@XCdN:d=a1dnv3m=  
p|MnRx9/L:M/>dR6Mc&~/,5dcdVq&s$LWEgu>*|U*_{zoU>i|^h>  
lgJpe3bBc+F $mulId4xo?wSUIQE$ASOFS<0RdQT.*|:vVBFKhn- -|  
pAKJ3Z0AX#!#
```

Note: The password should be encrypted in a single line with shell script kEncrypt.sh. This script is available in the <PPM_HOME>\bin folder. For example, C:\ITG\bin\kEncrypt.sh.

4. Open <PPM_HOME>\server\<PPM Server Name>\deploy\itg.war\WEB-INF\conf\axis2.xml. For example, C:\ITG\server\SMPPM\deploy\itg.war\WEB-INF\conf\axis2.xml, and comment out the following entries as shown below:

```
<axisconfig name="AxisJava2.0">  
  
<!--  
    <module ref="rampart" />  
    <parameter name="InflowSecurity">  
        <action>  
            <items>UsernameToken Timestamp Encrypt</items>  
  
        <passwordCallbackClass>com.mercury.itg.ws.core.handlers.  
security.PasswordCallbackHandler</passwordCallbackClass>  
        <decryptionPropFile>service.properties</decryptionPropFile>  
        </action>  
    </parameter>  
-->
```

Then, set the InFlowBasicAuth entry to true:

```
<parameter name="InFlowBasicAuth">  
    <Enforced>true</Enforced>  
</parameter>
```

Note: Service Manager server versions 7.x and 9.20 do not support Web Service Security, so you need to comment out the security configuration in the PPM Server to disable the Web Service Security function.

5. Restart the PPM Server for the configuration to take effect.

Chapter 3

Upgrading SM Service Catalog-PPM Center Project Proposal Integration Solution

To upgrade the SM Service Catalog-PPM Center Project Proposal Integration Solution from v1.00 to v1.01, perform the following steps:

1. Log in to Service Manager as a System Administrator.
2. Load the <Release_Package>/SMPPM/SM_unload/smis_SMCatalog_PPMPProjectProposal_v1.01.unl file into Service Manager.
3. Re-configure the PPM Workbench. Refer to "[Configuring the PPM Workbench](#)" on page 16 for detailed instructions.
4. Browse to the <PPM_HOME>\integration\smcatalog folder and replace the SMCatalog.jar file with the SMCatalog_v1.01.jar file located in the <Release_Package>/SMPPM/PPM_configuration directory of v1.01.
5. Re-configure the PPM Server. Refer to "[Configuring the PPM Server](#)" on page 34 for detailed instructions.

Appendix A

Customizing SM Project Proposal Catalog Item Fields

Perform the following steps to customize SM Project Proposal Catalog Item fields:

1. Log on to Service Manager as a System Administrator.
2. Go to **Service Catalog > Manage Catalog**. The Search Catalog Item Definitions page displays.

HP Service Manager - Search Service Catalog Records - HP Service Manager Client

File Edit Window Help

System Navigator

- Connection - tsmcvm2
- Favorites and Dashboards
- Menu Navigation
 - Change Management
 - Configuration Management
 - Incident Management
 - Knowledge Management
 - Problem Management
 - Request Management
 - Service Catalog
 - Add Field Mapping
 - Add Fields for Status Map
 - Approval Activities
 - Approval Roles
 - Approve Requests
 - Catalog Connectors
 - Catalog Screen Size
 - Delivery Objectives
 - Localized Catalog Items
 - Manage Catalog
 - Non-cart Catalog Requests
 - Order from Catalog
 - Request Management Converter
 - Saved Carts and Templates
 - Search Request
 - Service Desk
 - Service Level Management
 - System Administration
 - Tailoring
 - Approval Delegation
 - Integration Manager
 - ServiceManager Mail
 - System Status
 - To Do Queue
 - System Definition

Search Service Catalog Records

Back Search

Search Catalog Item Definitions

Name: Language:

Display Name: Owner:

Type: In category:

Available to:

☐ Active

☐ Non-cart item

☐ Information-only item

☐ Restrict request to single item

Description:

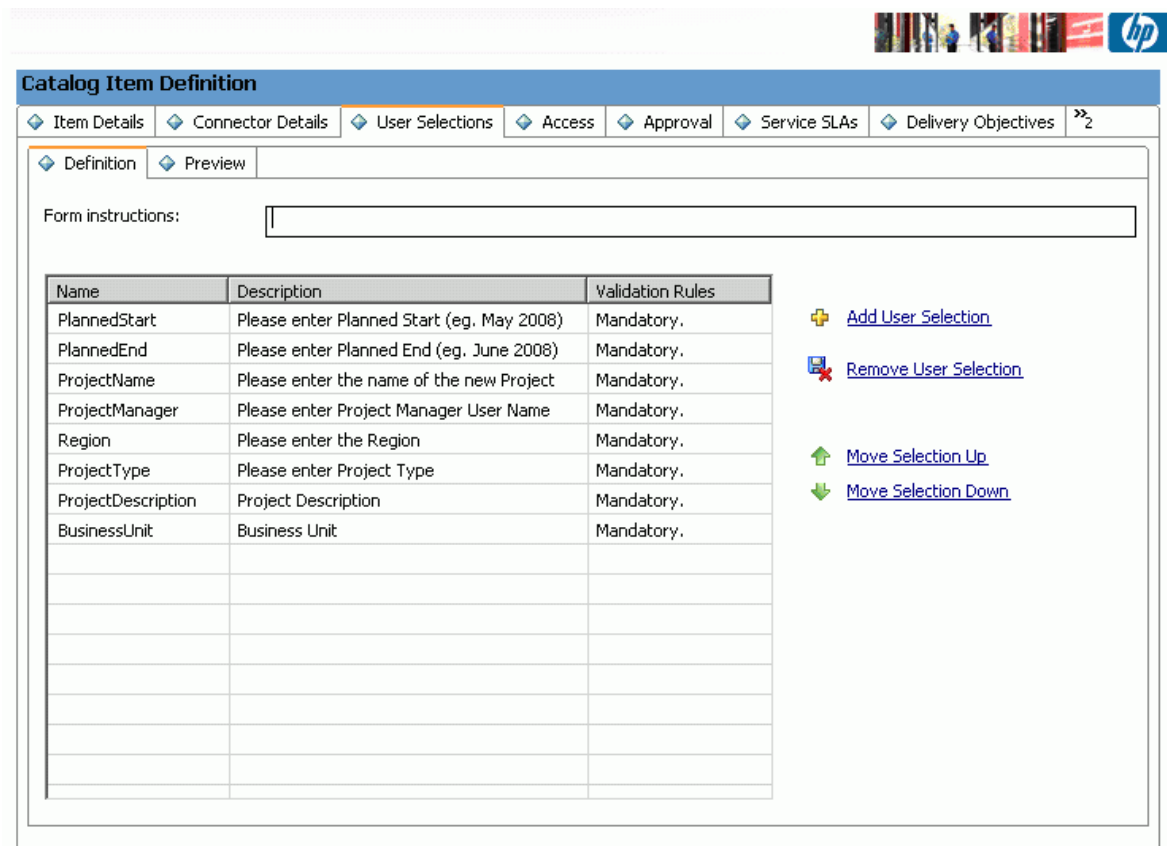
[Add New Category](#)

[Add New Catalog Item](#)

[Add New Bundle](#)

svcCatalog.search(svcCatalog.search)

3. Type **Project Proposal** in the Name field, and click **Search**. The Project Proposal Catalog Item Definition tab window displays. Click the **User Selections** tab.







Catalog Item Definition

Item Details Connector Details **User Selections** Access Approval Service SLAs Delivery Objectives »2

Definition Preview

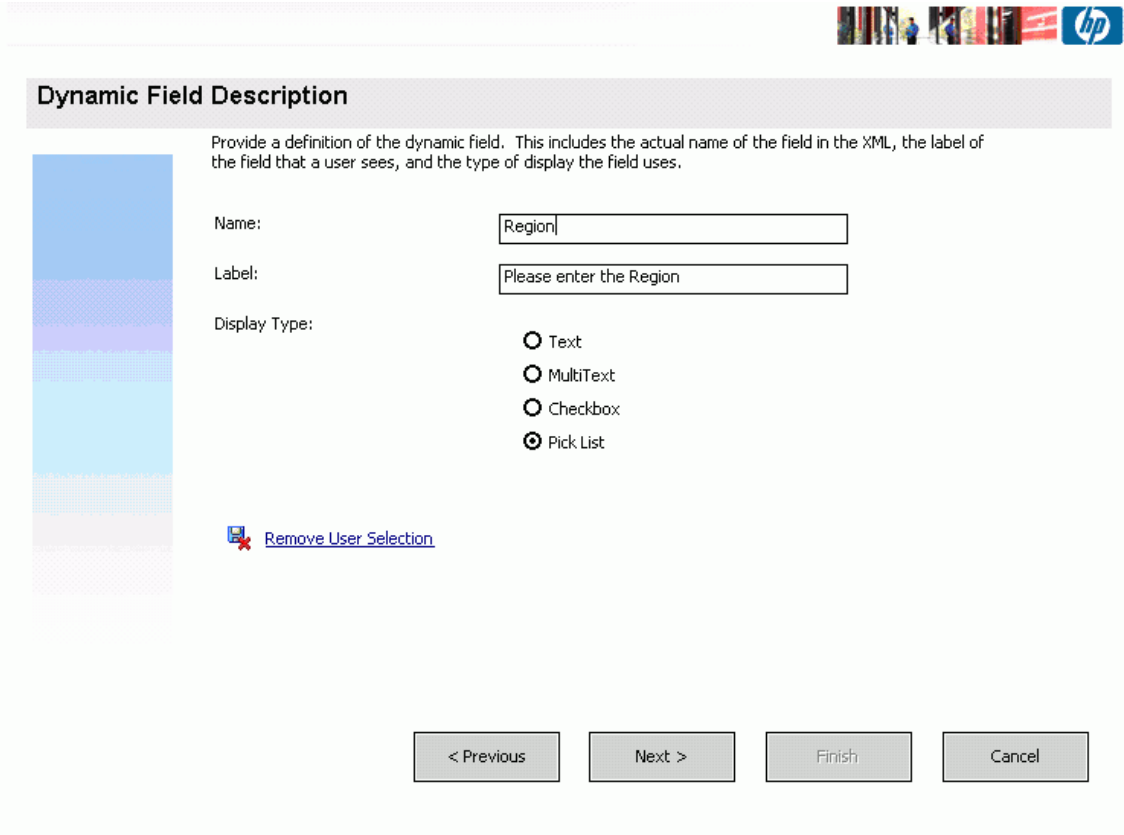
Form instructions:

Name	Description	Validation Rules
PlannedStart	Please enter Planned Start (eg. May 2008)	Mandatory.
PlannedEnd	Please enter Planned End (eg. June 2008)	Mandatory.
ProjectName	Please enter the name of the new Project	Mandatory.
ProjectManager	Please enter Project Manager User Name	Mandatory.
Region	Please enter the Region	Mandatory.
ProjectType	Please enter Project Type	Mandatory.
ProjectDescription	Project Description	Mandatory.
BusinessUnit	Business Unit	Mandatory.

 [Add User Selection](#)
 [Remove User Selection](#)
 [Move Selection Up](#)
 [Move Selection Down](#)

- In this page, you can click menu items in the right side of the window to edit fields of the Project Proposal Catalog Item, or simply double-click the entry you want to edit. For example, if you need to add a **Region** field, perform the following steps:

- a. Click **Add User Selection**, and provide values as required.



Dynamic Field Description


Provide a definition of the dynamic field. This includes the actual name of the field in the XML, the label of the field that a user sees, and the type of display the field uses.

Name:


Label:

Display Type:

- ☐ Text
- ☐ MultiText
- ☐ Checkbox
- ☒ Pick List

 [Remove User Selection](#)

- b. Click **Next**.
- In the value list table, provide optional values for the Region field. The values added will be available in the Project Proposal Catalog Item drop-down list for users to select.



Dynamic Field Description

Enter the pick list selections. The Value of the selection is the value stored in the XML while the Label is what the user sees. The choices may be displayed by either a drop down list or radio buttons.

Value	Label	Cost Adjustment
US	US	

Display choices using
☒ Drop-Down List
☐ Radio Buttons

< Previous

Next >

Finish

Cancel

Note: The value provided in the Value column must be the same as that in the PPM field on the web page.

- Click **Next**, and select a type from the **Type** drop-down list. You may also select the **Mandatory** check box as necessary.

Dynamic Field Validations

Define the type of field (number, string, or date), and whether or not the field is Mandatory.

Type:

☒ Mandatory

String
Number
String
Date/Time

< Previous Next > Finish Cancel

- d. Click **Next** to finish the wizard.
- e. Click **Save**. Now the **Please enter the Region** field is added in the Project Proposal Catalog Item.

Project Proposal
Request a Project Proposal through PPM

Order Information

Requested for: Jennifer Falcon

Quantity: 1

Unit Cost:

Item options

Please enter Planned Start (eg. May 2008)

Please enter Planned End (eg. June 2008)

Please enter the name of the new Project

Please enter Project Manager User Name

Please enter the Region: US

Please enter Project Type: US

Attachments

Image

[Add to Cart](#)

[Back to Catalog](#)

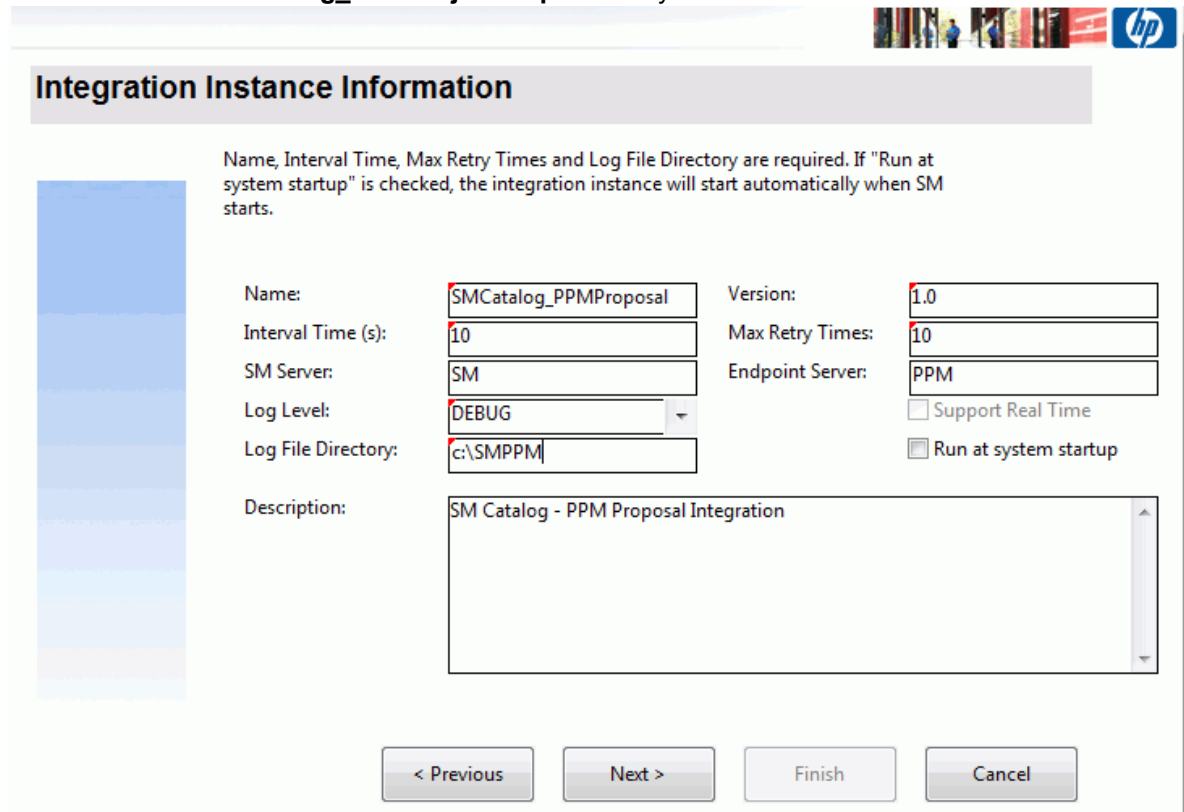
- After the custom fields are added to the Project Proposal Catalog Item, configure the fields mapping in the SMIS framework. To do so, go to **Tailoring > Integration Manager**.

SMISFieldMapping record added.

SMIS 1.00 014

	Id	Name	Status	Version	Interval T...	Max Retr...	SM Ser...	Endpoint Server
Add	5	SMBAC	Disabl...	v2.00	120	3	SM	BAC
Edit	6	SMCat...	Disabl...	1.0	10	10	SM	PPM
Refresh								
Enable								
Disable								
Delete								
Task								

6. Double-click the **SMCatalog_PPMPProjectProposal** entry.



Integration Instance Information

Name, Interval Time, Max Retry Times and Log File Directory are required. If "Run at system startup" is checked, the integration instance will start automatically when SM starts.

Name: SMCatalog_PPMPProposal Version: 1.0

Interval Time (s): 10 Max Retry Times: 10

SM Server: SM Endpoint Server: PPM

Log Level: DEBUG ☐ Support Real Time

Log File Directory: c:\SMPPM ☒ Run at system startup

Description: SM Catalog - PPM Proposal Integration

< Previous Next > Finish Cancel

7. Click **Next**.
8. Click **Next** again. The Integration Instance Fields page displays.
9. In the **SM Fields** tab, add the created fields (for example, **Region**) to the Project Proposal Catalog Item.

Integration Instance Fields

All fields for both SM and Endpoint of the integration are listed here. Please put SM fields in SM Fields tab, endpoint fields in Endpoint Fields

SM Fields | Endpoint Fields

Field Name	Field Type
CallID	string
PlannedStart	string
PlannedEnd	string
ProjectName	string
ProjectManager	string
Region	string
ProjectType	string
ProjectDescription	string
BusinessUnit	string

< Previous Next > Finish Cancel

10. Click the **Endpoint Fields** tab, and add PPM fields that map to the fields added to the Project Proposal Catalog Item. For example, **REQ.P.KNTA_REGION** is a field in PPM mapping to **Region** of the Service Manager Project Proposal Catalog Item.

Integration Instance Fields

All fields for both SM and Endpoint of the integration are listed here. Please put SM fields in SM Fields tab, endpoint fields in Endpoint Fields

SM Fields | Endpoint Fields

Field Name	Field Type	Description
REQ.P.KNTA_PLAN_START_DATE	string	
REQ.P.KNTA_PLAN_FINISH_DATE	string	
REQ.P.KNTA_PROJECT_NAME	string	
REQ.P.KNTA_PROJECT_MANAGER	string	
REQ.P.KNTA_REGION	string	
REQ.P.KNTA_PROJECT_TYPE	string	
REQ.DESCRPTION	string	
REQ.P.KNTA_BUSINESS_UNIT	string	
REQD.P.CALLID	string	

< Previous Next > Finish Cancel

11. Click **Next**.
12. In the Field Mapping pane, map the fields of the Service Manager Project Proposal Catalog Item to PPM Project Proposal fields.

Integration Instance Mapping

Add field mapping in Field Mapping tab, value mapping in Value Mapping tab. In Field Mapping, click Edit Callback to edit or add callback to SM Callback or EP Callback, click Clear Callback to clear callback.

SM Server: Endpoint Server:

Field Mapping

Value Mapping

Edit Callback

Clear Callback

SM Field	D..	Endpoint Field	SM Default	SM Callba
CallID	->	REQD.P.CALLID		
PlannedStart	->	REQ.P.KNTA_PLAN_START_DATE		
PlannedEnd	->	REQ.P.KNTA_PLAN_FINISH_DATE		
ProjectName	->	REQ.P.KNTA_PROJECT_NAME		
ProjectManager	->	REQ.P.KNTA_PROJECT_MANAGER		
Region	->	REQ.P.KNTA_REGION		
ProjectType	->	REQ.P.KNTA_PROJECT_TYPE		
ProjectDescription	->	REQ.DESCRPTION		
BusinessUnit	->	REQ.P.KNTA_BUSINESS_UNIT		

Note: The **CallID** field is mandatory. PPM Center uses the mapping field **REQD.P.CALLID** to synchronize the status back to Service Manager.

For more information about configuring field mappings or value mappings, see the *HP Service Manager Integration Suite User Guide*.

Appendix B

Troubleshooting

Issue 1

If the Project Proposal Catalog Item fails to submit to PPM Center, check the following:

- The **CallID** field is added to the PPM Request Type field (for example, PFM–Proposal).
- The `linker.startup` scheduler is started in Service Manager. For more information on how to start the scheduler, see the following content.
- The **SMCatalog–PPMProjectProposal** integration instance is properly configured in the Integration Manager of Service Manager, and the instance is enabled.
- The PPM Server is running, and the Service Manager server host is connected to the PPM Server host.

Issue 2

If you cannot access a Service Manager record from the URL from the PPM Center web page, check the following:



References	
URLs	
Name	Date
SD10319	June 29, 2009 10:17:12 AM GMT+08:00

- The configuration item `querySecurity` is set to `false` in `web.xml` under Service Manager web application's WEB-INF folder (for example, `C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\sm711\WEB-INF\web.xml`).

```
<!-- Enables secure encoding of queries -->
<init-param>
    <param-name>querySecurity</param-name>
    <param-value>false</param-value>
</init-param>
```

- Value for the server host is the machine name.

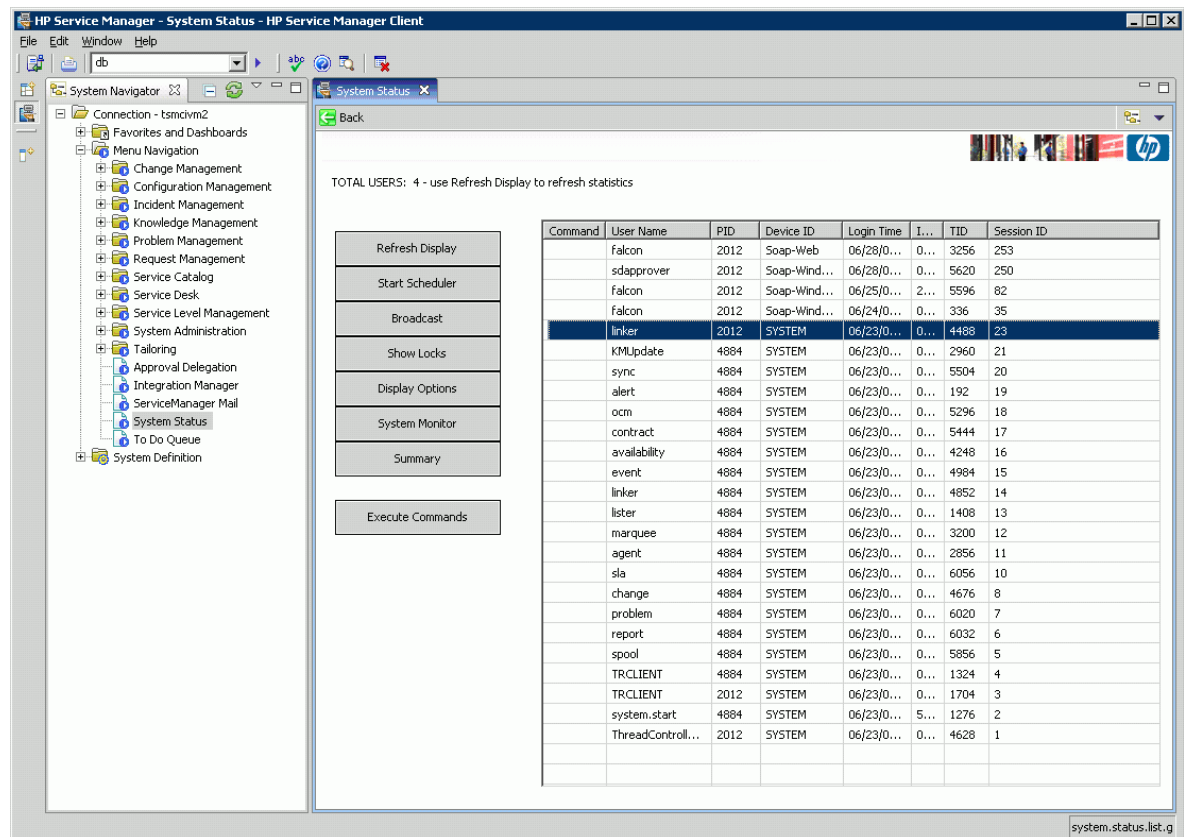
```
<init-param>
<!-- Specify the HP Service Manager server host and port location -->
```

```
<param-name>serverHost</param-name>
<param-value>smcfrd78</param-value>
</init-param>
<init-param>
    <param-name>serverPort</param-name>
    <param-value>13080</param-value>
</init-param>
```

Issue 3

If there is no Proposal Request submitted to PPM Center after the specified interval time, make sure that the scheduler linker is running in Service Manager.

1. Go to **System Status**, and make sure that there is an entry with a User Name of linker.



HP Service Manager - System Status - HP Service Manager Client

System Navigator

- Connection - tsmcvm2
 - Favorites and Dashboards
 - Menu Navigation
 - Change Management
 - Configuration Management
 - Incident Management
 - Knowledge Management
 - Request Management
 - Service Catalog
 - Service Desk
 - Service Level Management
 - System Administration
 - Tailoring
 - Approval Delegation
 - Integration Manager
 - ServiceManager Mail
 - System Status
 - To Do Queue
 - System Definition

System Status

Back

TOTAL USERS: 4 - use Refresh Display to refresh statistics

Refresh Display

Start Scheduler

Broadcast

Show Locks

Display Options

System Monitor

Summary

Execute Commands

Command	User Name	PID	Device ID	Login Time	I...	TID	Session ID
	falcon	2012	Soap-Web	06/28/0...	0...	3256	253
	sdapprover	2012	Soap-Wind...	06/28/0...	0...	5620	250
	falcon	2012	Soap-Wind...	06/25/0...	2...	5596	82
	falcon	2012	Soap-Wind...	06/24/0...	0...	336	35
	linker	2012	SYSTEM	06/23/0...	0...	4488	23
	KMLUpdate	4884	SYSTEM	06/23/0...	0...	2960	21
	sync	4884	SYSTEM	06/23/0...	0...	5504	20
	alert	4884	SYSTEM	06/23/0...	0...	192	19
	ocm	4884	SYSTEM	06/23/0...	0...	5296	18
	contract	4884	SYSTEM	06/23/0...	0...	5444	17
	availability	4884	SYSTEM	06/23/0...	0...	4248	16
	event	4884	SYSTEM	06/23/0...	0...	4984	15
	linker	4884	SYSTEM	06/23/0...	0...	4852	14
	lister	4884	SYSTEM	06/23/0...	0...	1408	13
	marquee	4884	SYSTEM	06/23/0...	0...	3200	12
	agent	4884	SYSTEM	06/23/0...	0...	2856	11
	sla	4884	SYSTEM	06/23/0...	0...	6056	10
	change	4884	SYSTEM	06/23/0...	0...	4676	8
	problem	4884	SYSTEM	06/23/0...	0...	6020	7
	report	4884	SYSTEM	06/23/0...	0...	6032	6
	spool	4884	SYSTEM	06/23/0...	0...	5856	5
	TRCLIENT	4884	SYSTEM	06/23/0...	0...	1324	4
	TRCLIENT	2012	SYSTEM	06/23/0...	0...	1704	3
	system.start	4884	SYSTEM	06/23/0...	5...	1276	2
	ThreadControll...	2012	SYSTEM	06/23/0...	0...	4628	1

system.status.list.g

2. If the entry does not exist, click **Start Scheduler** and then double-click **linker.startup** to start the linker scheduler.

Name	Description
agent	query/chart agent
alert.processor	Standard Alert processor
availability.startup	availability processor
change.startup	ChM alert/notification processor
contract	contract background agent
emailout.startup	emailout startup
event.startup	Event Services processor
gie.startup	Generic Input Event Services processor
inactive.startup	dismiss inactive users
KMUpdate	Checks for update records and sends them to the indexer
linker.startup	Problem/Incident Sync Task
lister.startup	Global List Builder Routine
marquee	marquee agent
ocm.startup	OCM processor
printer.startup	print scheduler
problem	IM alert and message processor
report.startup	report processor
scauto.startup	SCAUTO startup
SLA	SLA background agent
SMBAC13	Info for the integration SMBAC
SMBAC20	Info for the integration SMBAC
SMBAC3	Info for the integration SMBAC
SMCatalog_PPMPProp...	Info for the integration SMCatalog_PPMPProposal
startup	system startup default
Sync	

3. If an employee self-service (ESS) user needs to access the Project Proposal option in Service Catalog, add the **svcCatDeptRequester** capability word in the Startup tab of the operator record for this user.

[illegible]

We appreciate your feedback!

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on SM Service Catalog-PPM Center Project Proposal Integration Solution, 1.01 Configuration Guide

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to oudoc-itsm@hp.com.

