HP SM Service Catalog-PPM Center Project Proposal Integration Solution

Software Version: 1.01

For the supported Windows® operating system

Configuration Guide

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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.

For the supported Service Manager versions, refer to the **Support Matrix** section on **Service Catalog to Project Proposal (SM - PPM)**.

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 availabe 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:

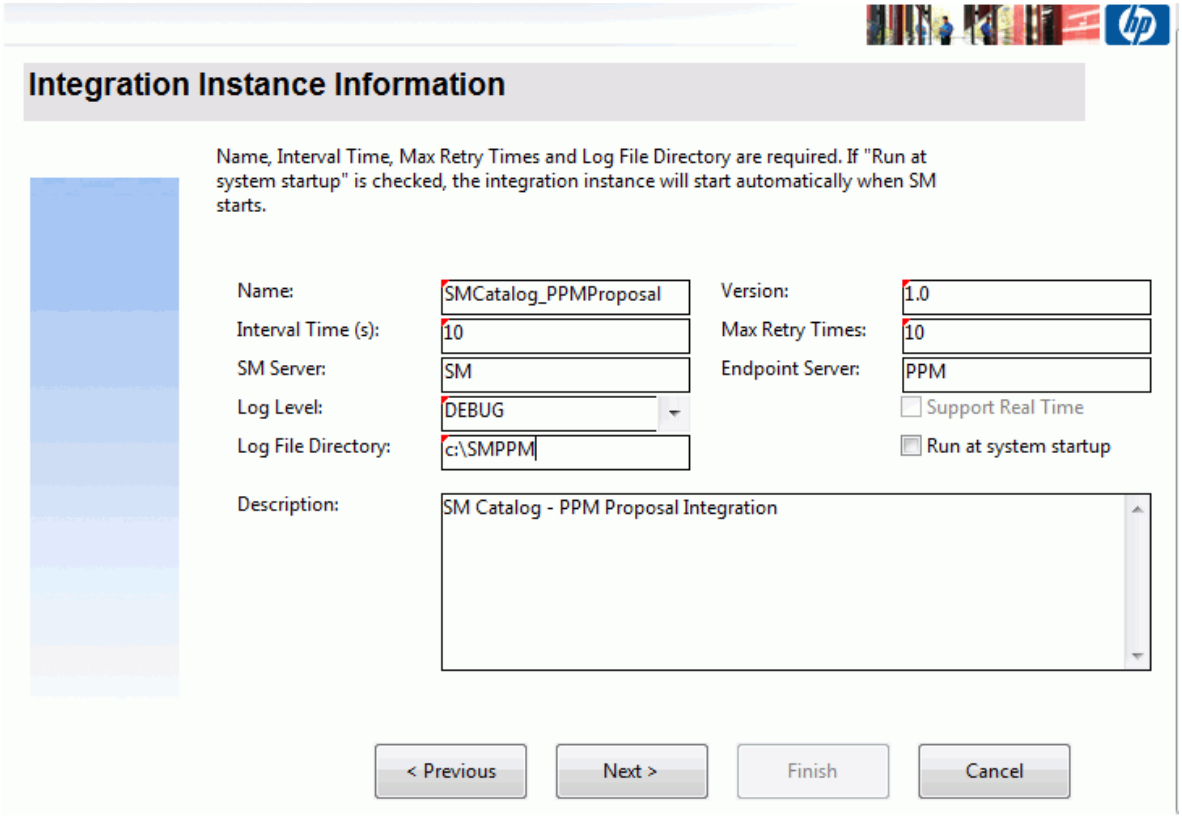
1. Log on to Service Manager as a System Administrator.
2. Type `db` in the command line and press **Enter**. The Database Manager logon page displays.
3. Right click in the window and select **Import/Load** from the context menu. HP Service Manager File Load/Import page displays.
4. For the File Name field, browse to the <Release_Package>/SMPPM/SM_unload/smis_SMCatalog_PPMProjectProposal_v1.01.unl file. For other fields and options, keep the default settings.
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, follow these steps:

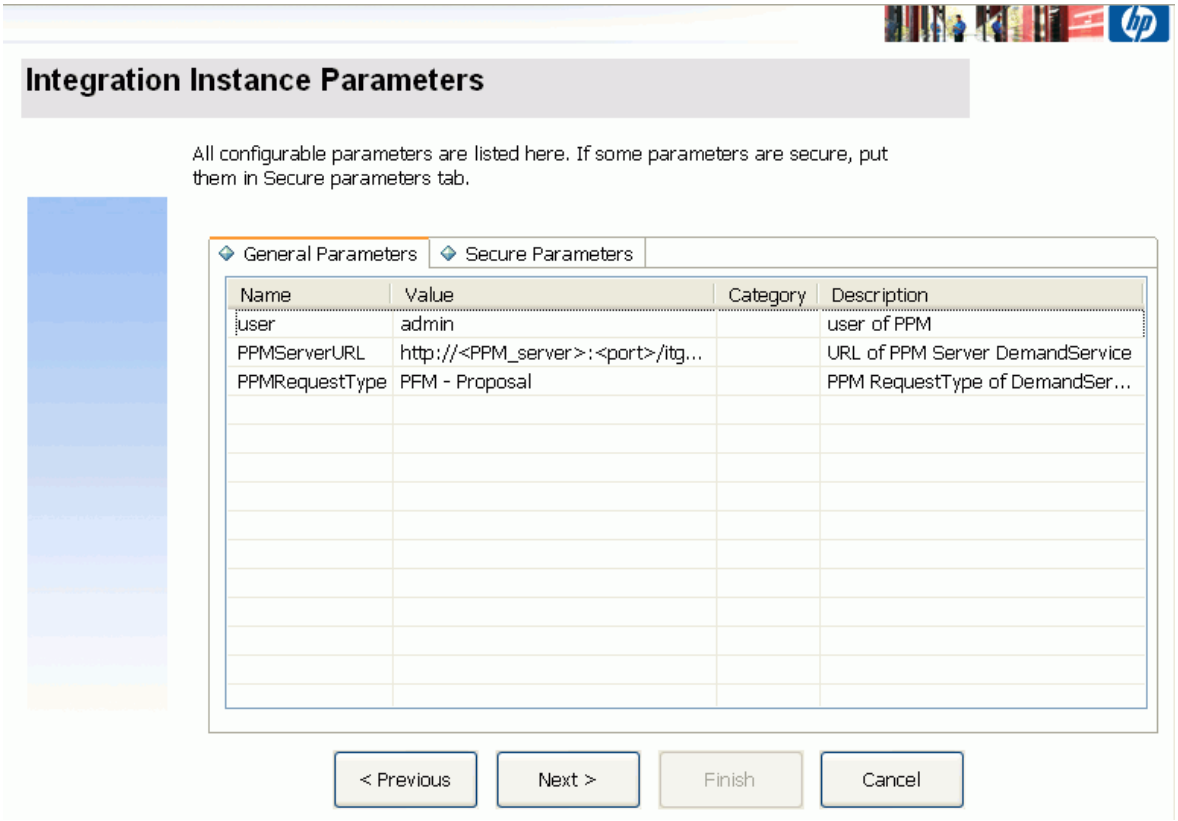
1. Log on to Service Manager as a System Administrator.
2. Go to **Tailoring** > **Integration Manager.**
3. Click **Add**. The Integration Template Selection page displays.
4. Select **SMCatalog_PPMProposal** from the **Integration Template** list, and then select the **Import Mapping** check box.
5. 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.



7. Click **Next**. The Integration Instance Parameters page displays.

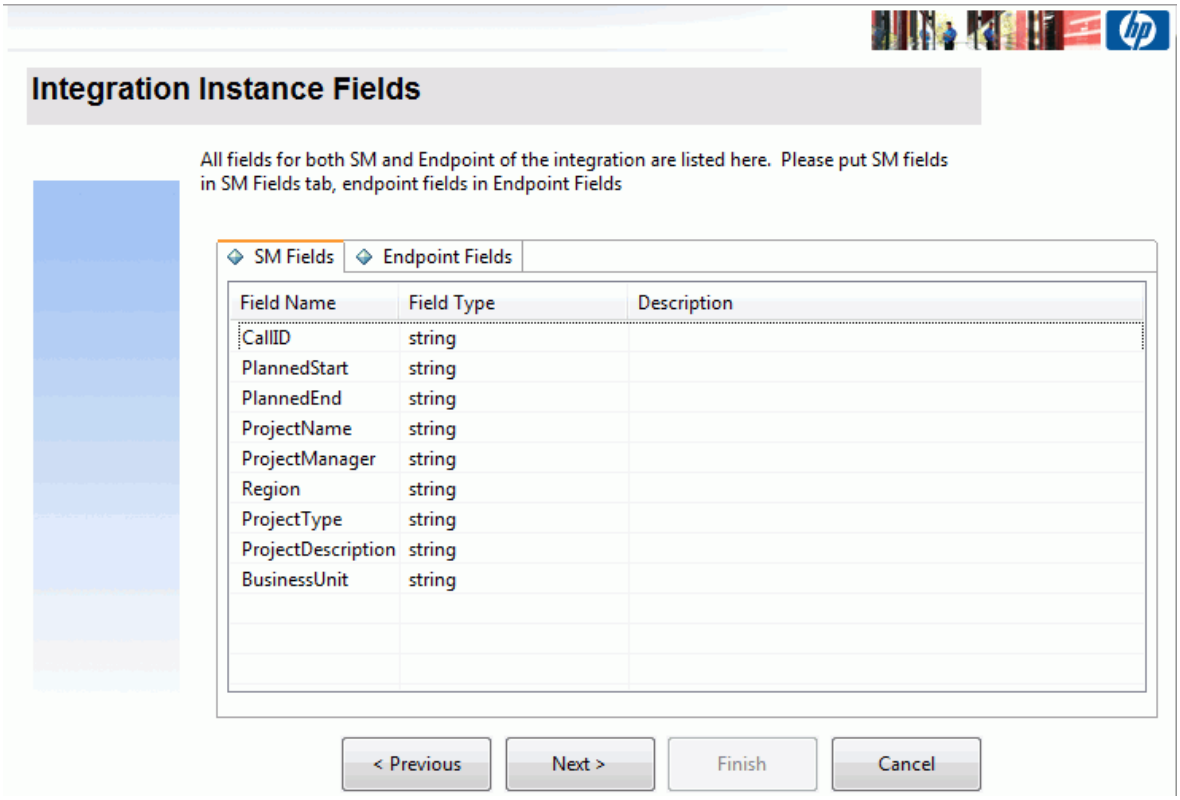
8. In the **General Parameters** and **Secure Parameters** tabs, modify parameter values as described in the table below:

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.



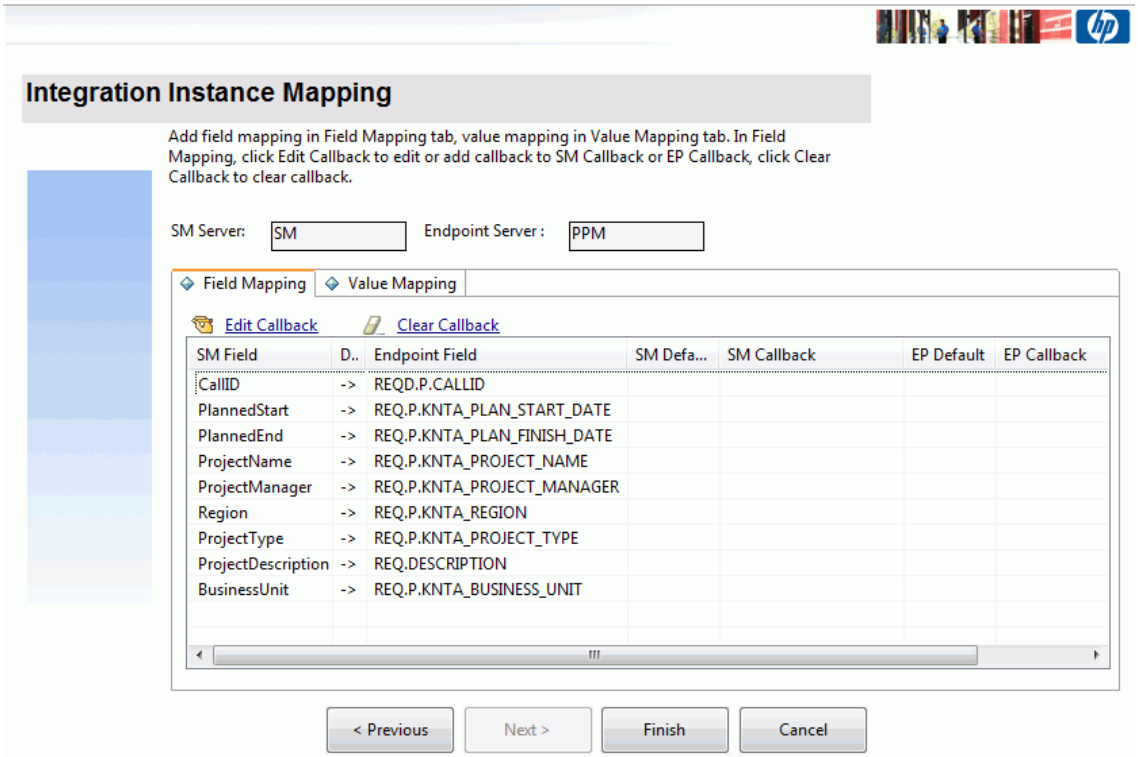
9. Click **Next**. The Integration Instance Fields page displays.

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.



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.



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).

13. Click **Finish**. The new integration instance is added.
14. 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. Click 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.

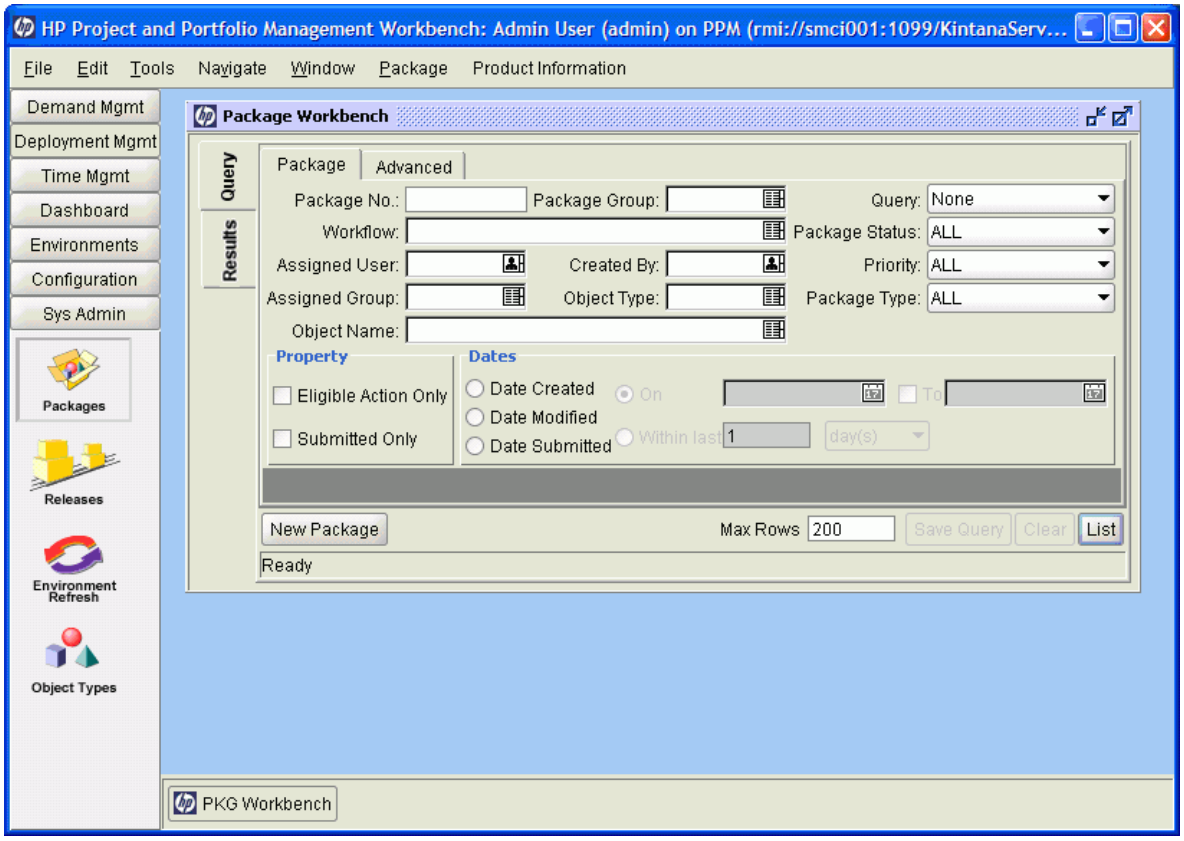
For the supported PPM Center versions, refer to the **Support Matrix** section on **Service Catalog to Project Proposal (SM - PPM)**.

Configuring the PPM Workbench

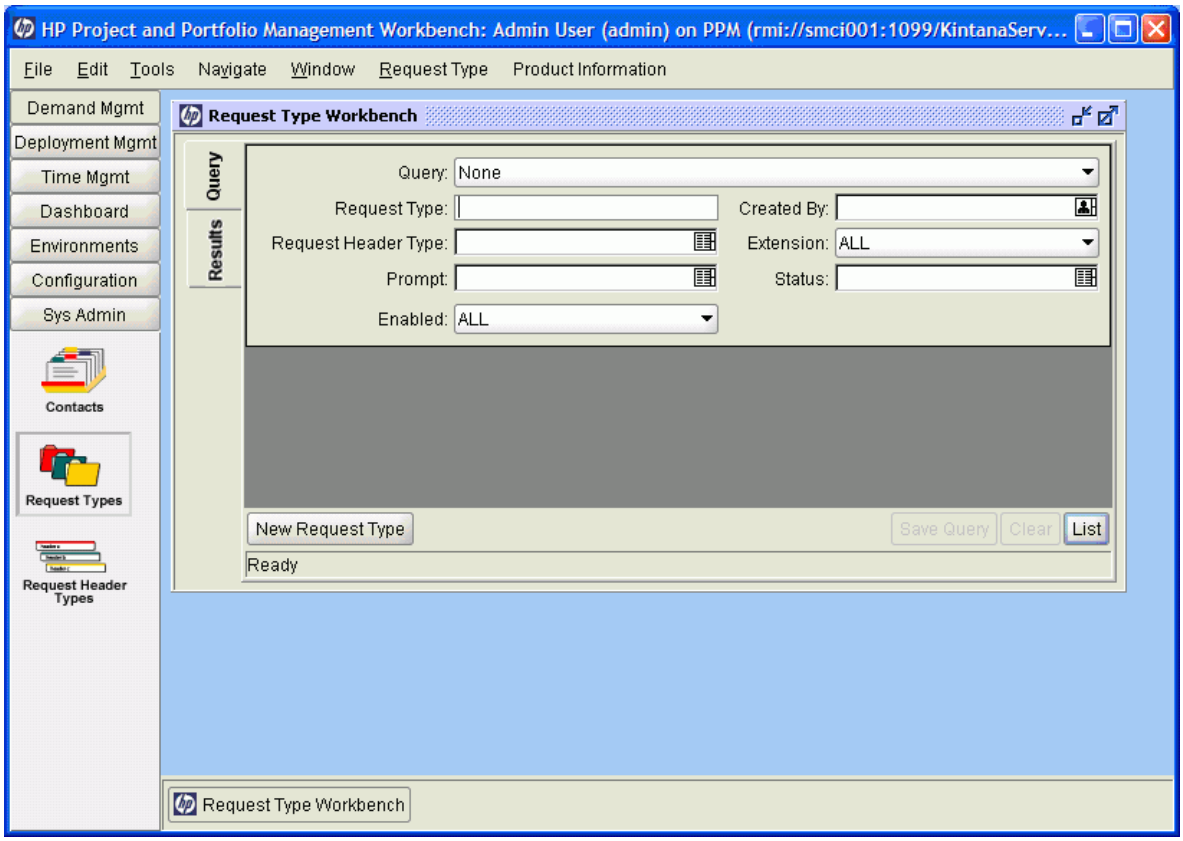
Perform the following steps to configure the PPM Workbench:

1. Log on to PPM Center as an administrator.

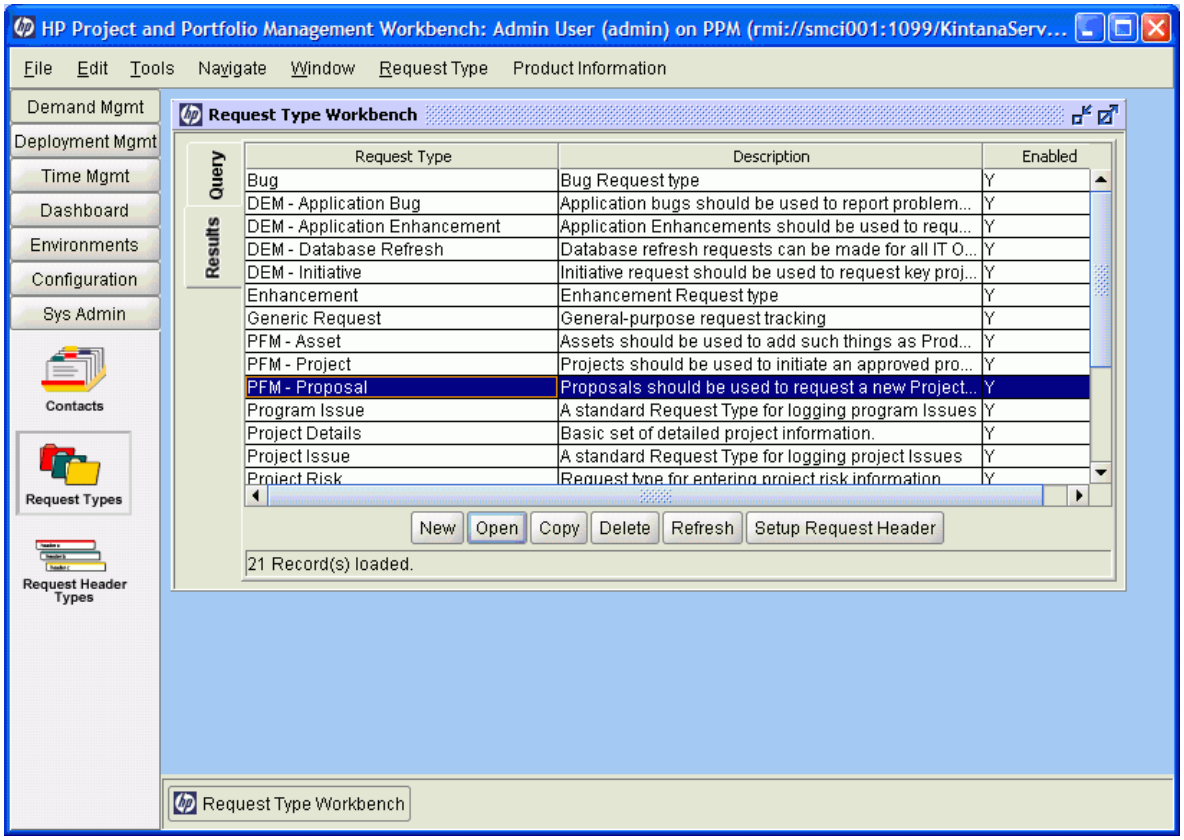
2. In the navigation pane, go to **Administration** > **Open Workbench**. The Project and Portfolio Management Workbench application launches.



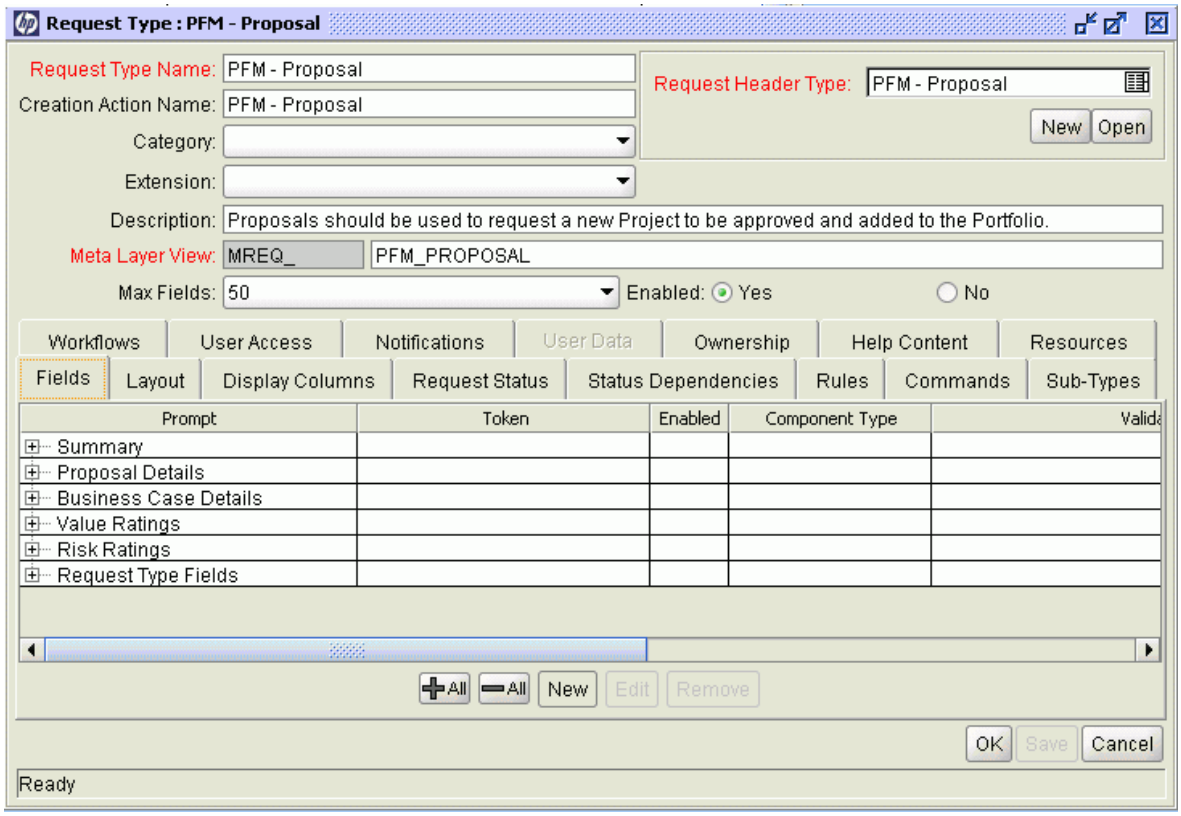
3. In the left navigation pane, click **Demand Mgmt** > **Requets Types**. The Request Type Workbench window opens.



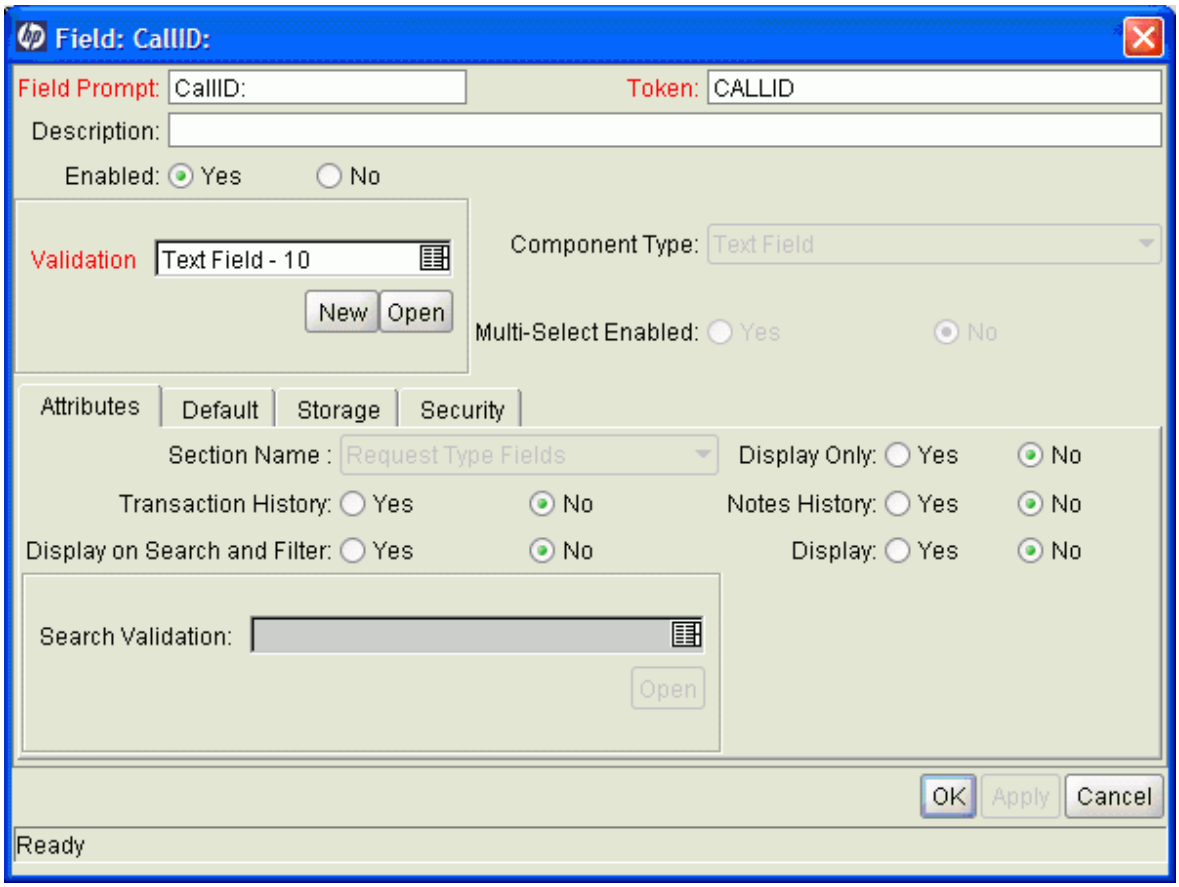
4. Click **List** to list all request types in PPM Center.

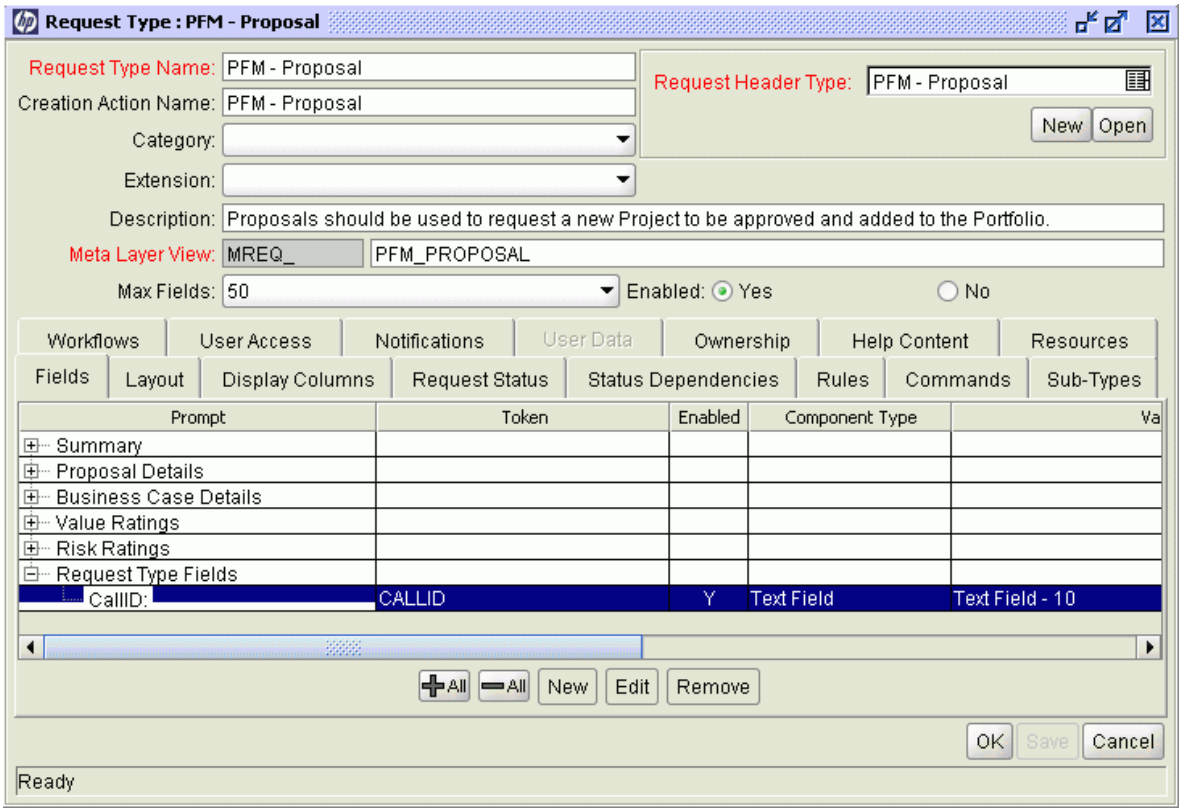


5. Double-click the **PFM–Proposal** entry, or select it and then click **Open**.



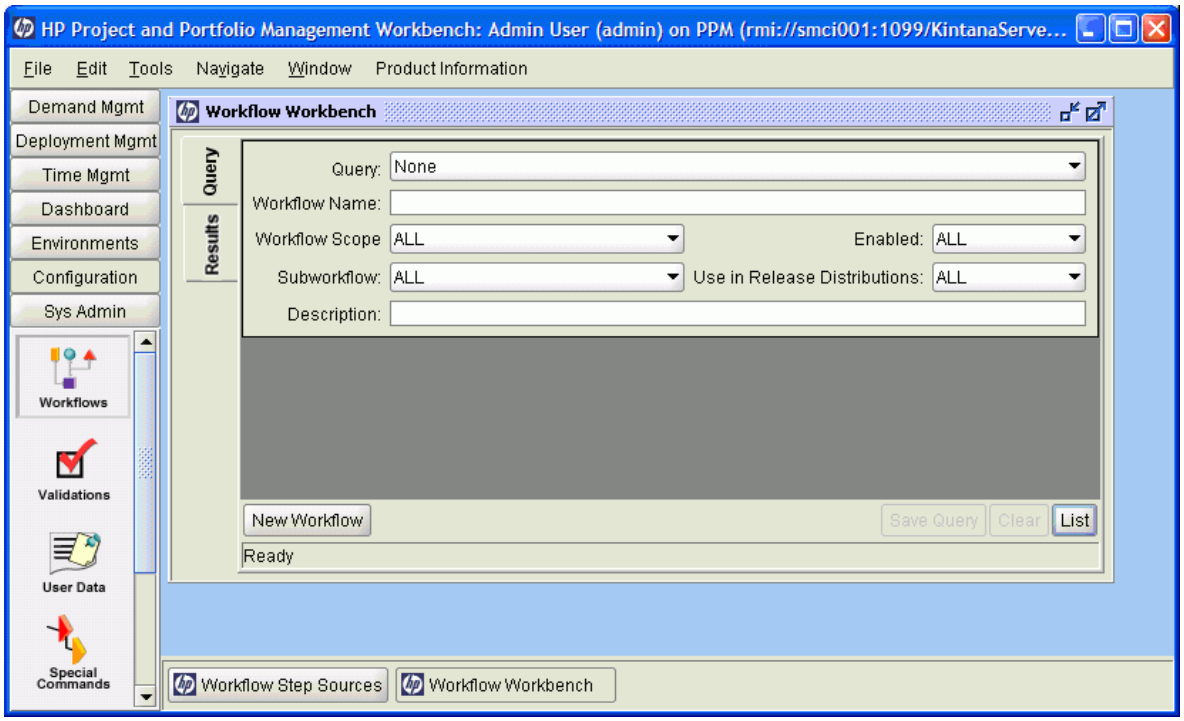
6. Go to the Fields tab and click **New**. Add a new field **CallID** for the PFM–Proposal Request Type, and provide values for required fields as shown below.


Field: CallID:
Field Prompt: CallID:
Token: CALLID
Description:
Enabled: Yes No
Validation Text Field - 10
New Open
Component Type: Text Field
Multi-Select Enabled: Yes No
Attributes Default Storage Security
Section Name : Request Type Fields
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

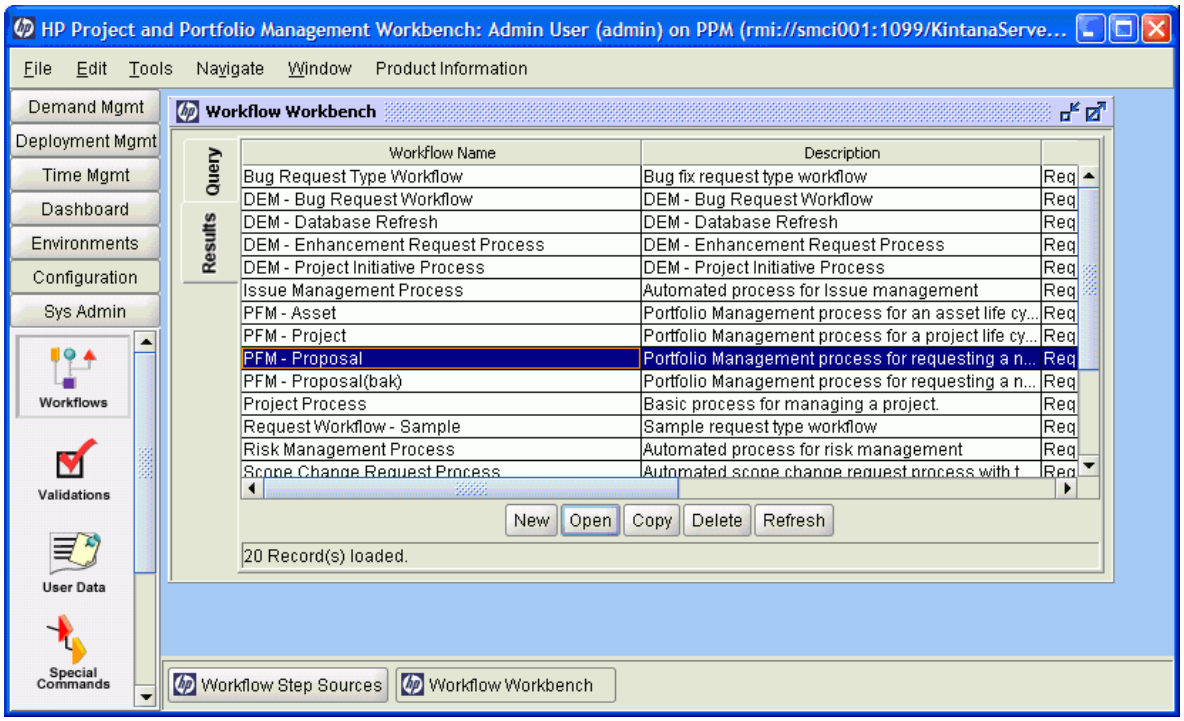


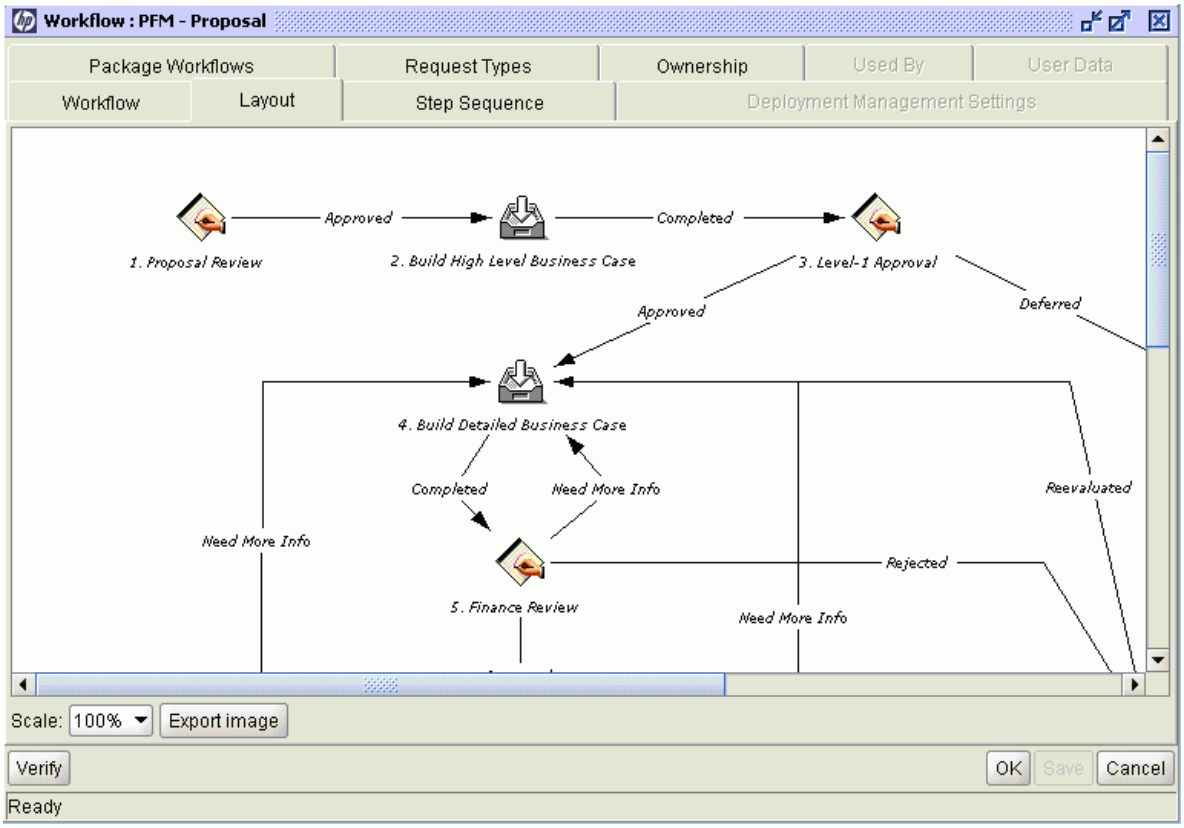
7. Click **OK** to save the modification.

8. In the left navigation pane, click **Configuration** > **Workflows** to launch the Workflow Workbench window.

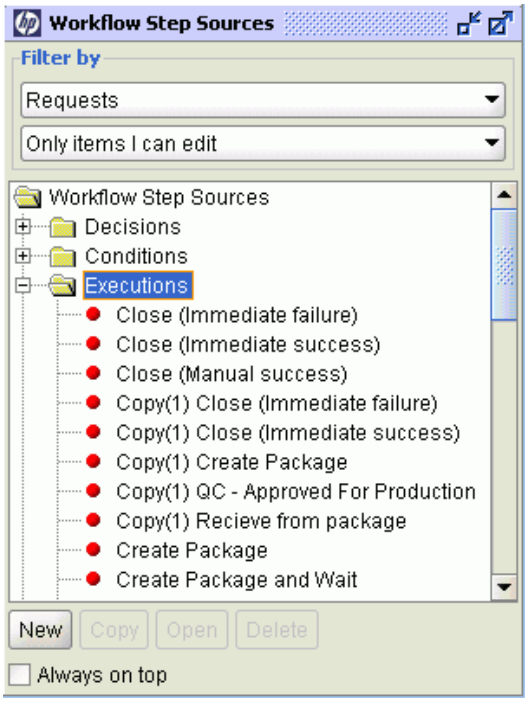


9. Click **List** to list all workflows. Locate the **PFM–Proposal** entry from the list, and double-click on it or click **Open**.

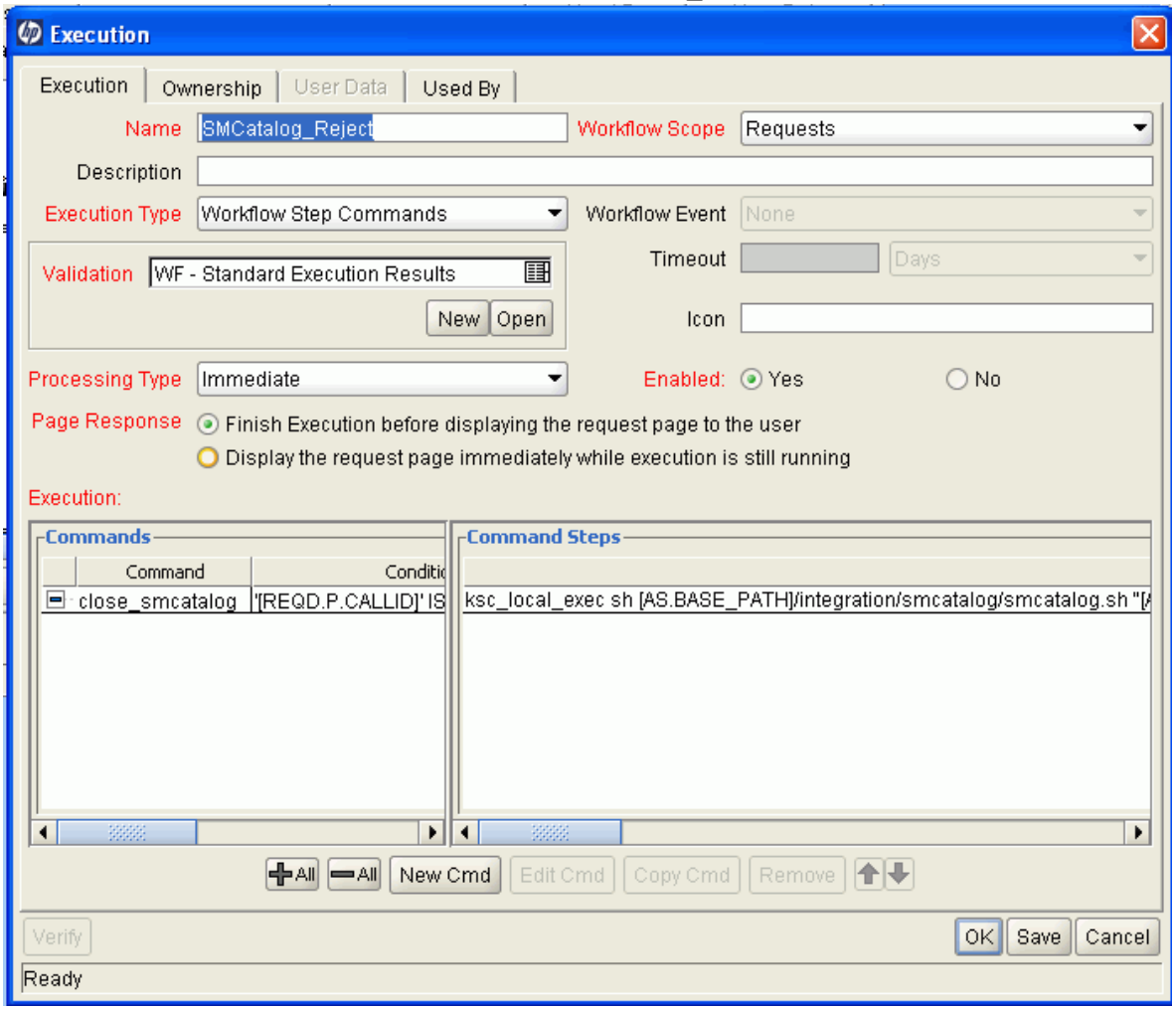




10. In the Workflow Step Sources sub-window, select the **Executions** node in the Workflow Step Sources item tree.

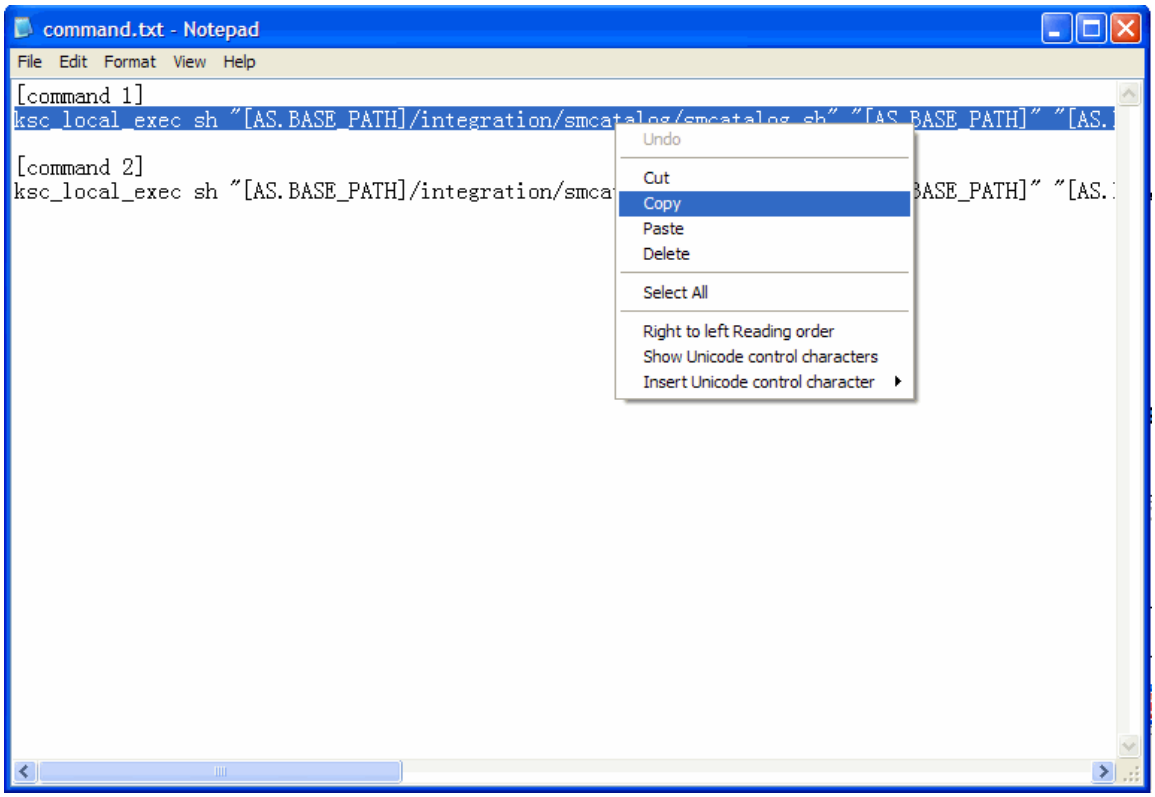

Workflow Step Sources
Filter by
Requests
Only items I can edit
Workflow Step Sources
Decisions
Conditions
Executions
Close (Immediate failure)
Close (Immediate success)
Close (Manual success)
Copy(1) Close (Immediate failure)
Copy(1) Close (Immediate success)
Copy(1) Create Package
Copy(1) QC - Approved For Production
Copy(1) Recieve from package
Create Package
Create Package and Wait
New
Copy
Open
Delete
Always on top

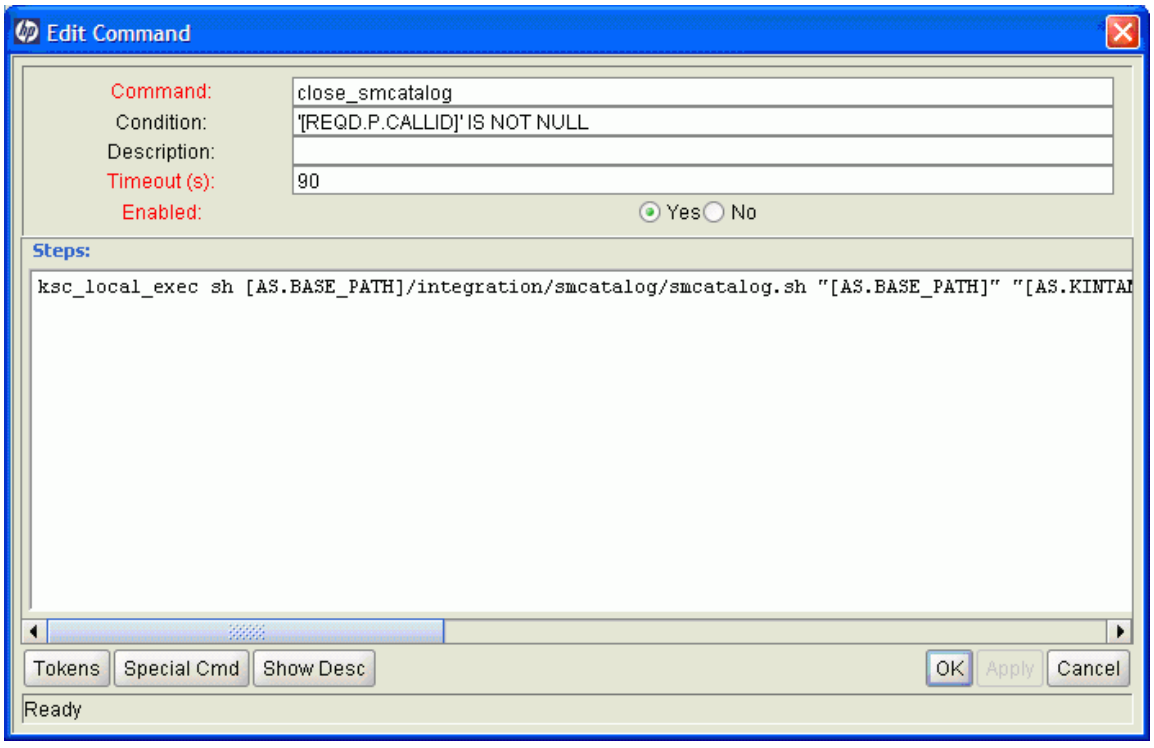
11. Click **New** to create a new workflow step source `SMCatalog_Reject`.



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.

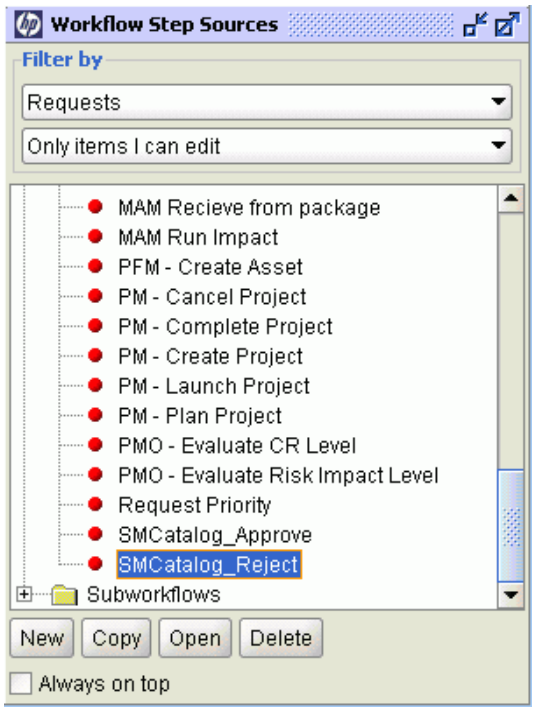

command.txt - Notepad
File Edit Format View Help
[command 1]
[command 2]
Undo
Cut
Copy
Paste
Delete
Select All
Right to left Reading order
Show Unicode control characters
Insert Unicode control character


Edit Command
Command: close_smcatalog
Condition: '[REQD.P.CALLID]' IS NOT NULL
Description:
Timeout (s): 90
Enabled: Yes No
Steps:
ksc_local_exec sh [AS.BASE_PATH]/integration/smcatalog/smcatalog.sh "[AS.BASE_PATH]" "[AS.KINTA
Tokens
Special Cmd
Show Desc
OK
Apply
Cancel
Ready

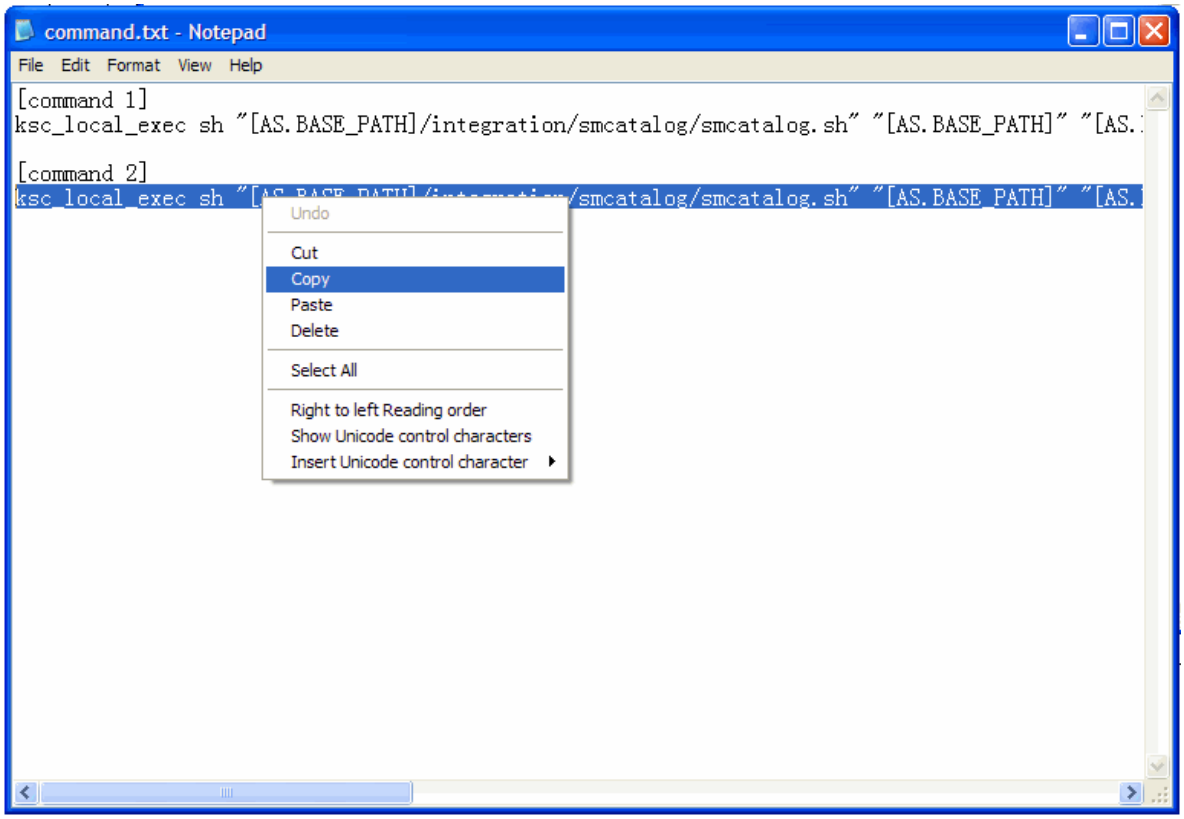
The following is the detailed script ([command 1] in command.txt):

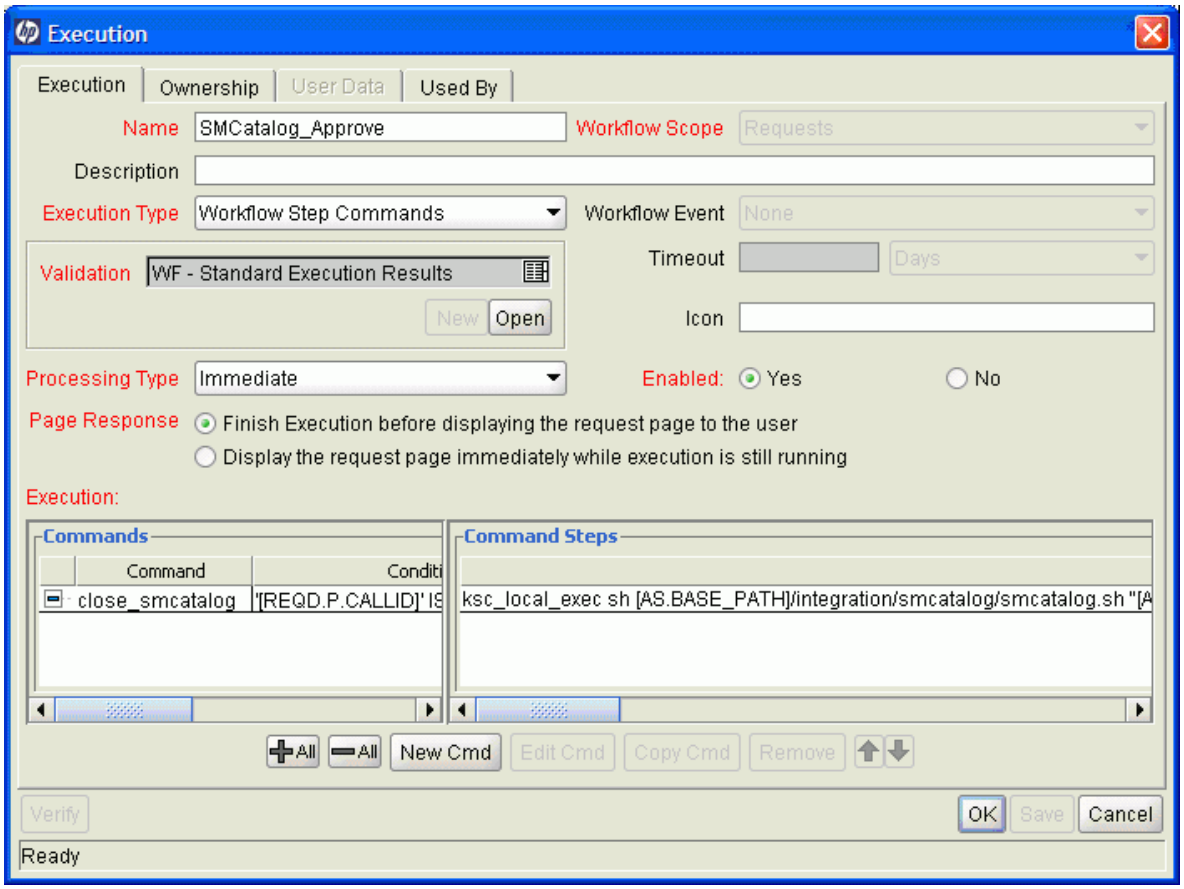
```
ksc_local_exec sh "[AS.BASE_PATH]/integration/smcatalog/smcatalog.sh"
 "[AS.BASE_PATH]" "[AS.KINTANA_SERVER_NAME]"
 "[AS.SM_URL]/sc62server/PWS/ServiceDeskForPPM"
 "[AS.SM_USERNAME]" "[AS.SM_PASSWORD]"
 "[REQD.P.CALLID]" "Request Rejected"
 "Proposal has been rejected."
```

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.

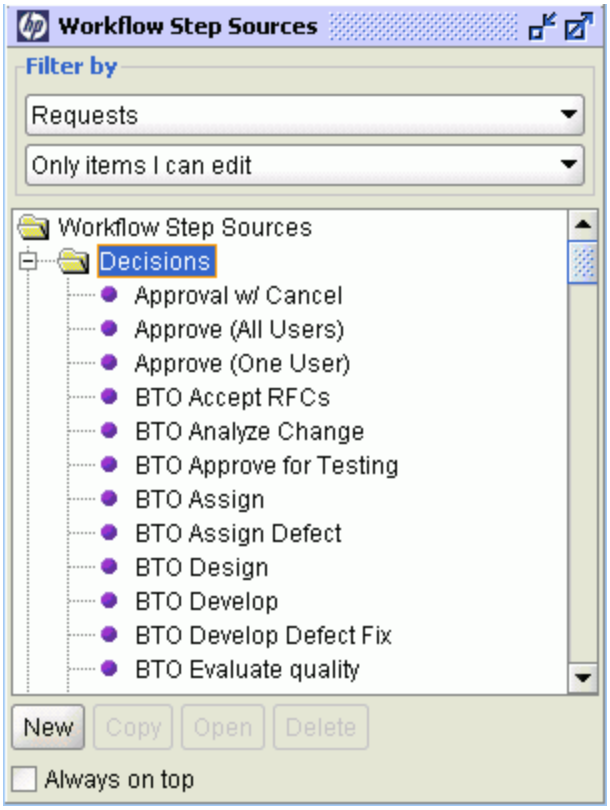

command.txt - Notepad
File Edit Format View Help
[command 1]
ksc_local_exec sh "[AS.BASE_PATH]/integration/smcatalog/smcatalog.sh" "[AS.BASE_PATH]" "[AS.
[command 2]
ksc_local_exec sh "[AS.BASE_PATH]/integration/smcatalog/smcatalog.sh" "[AS.BASE_PATH]" "[AS.
Undo
Cut
Copy
Paste
Delete
Select All
Right to left Reading order
Show Unicode control characters
Insert Unicode control character



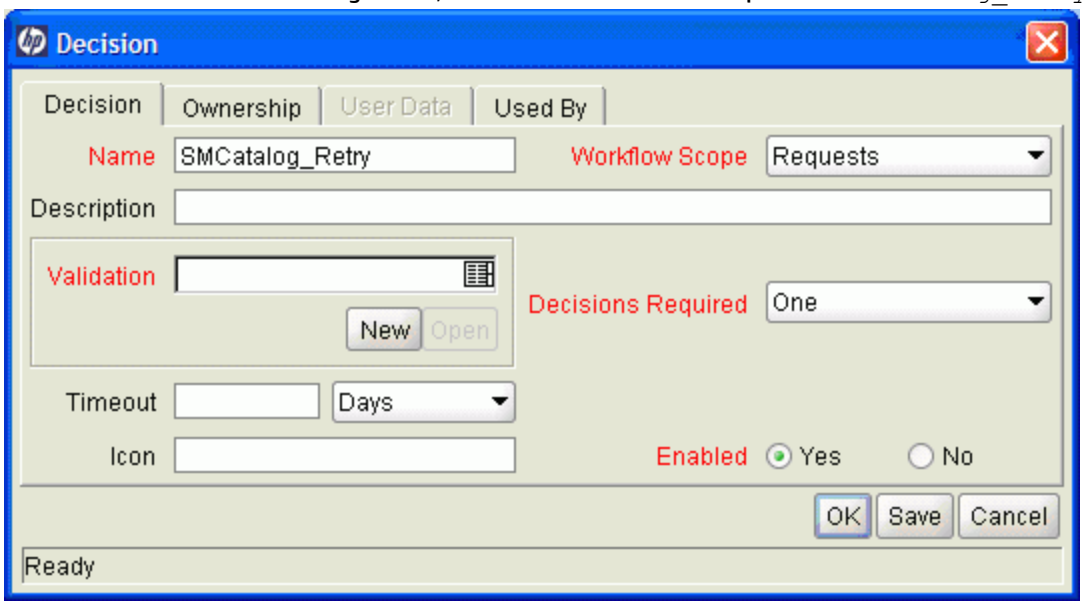
The following is the detailed script ([command 2] in command.txt):

```
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."
```

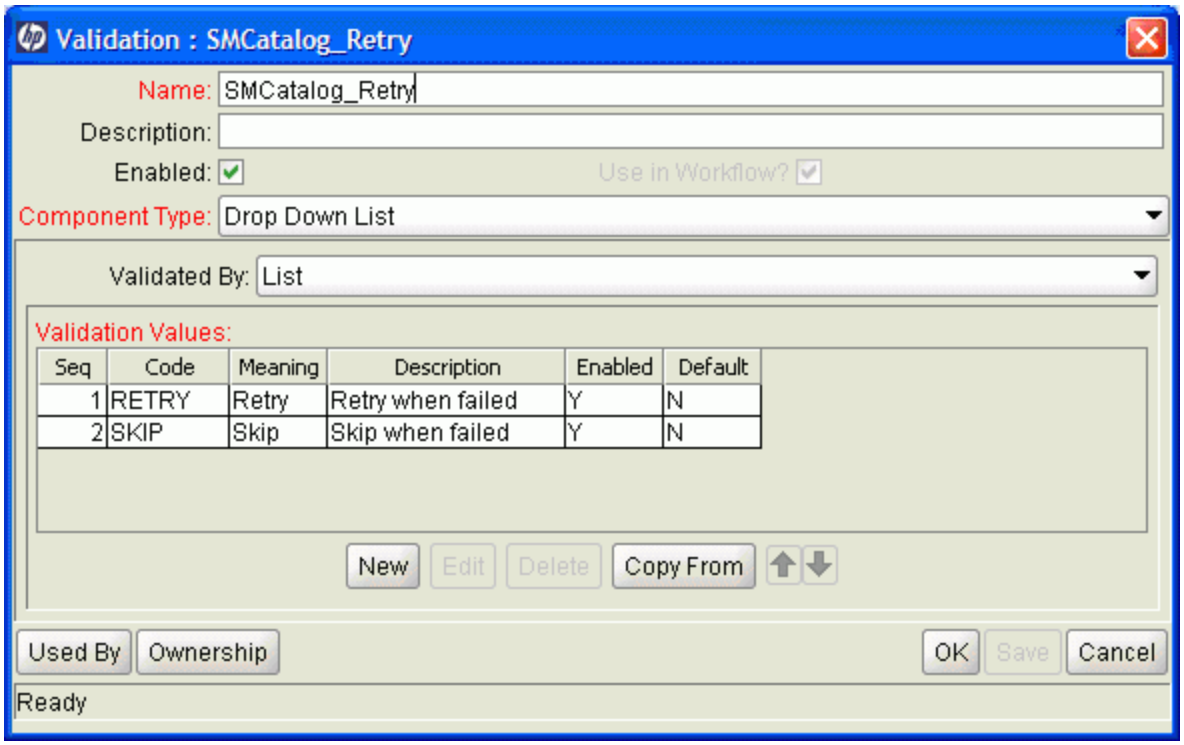
15. In the Workflow Step Sources sub-window, select the **Decisions** node.



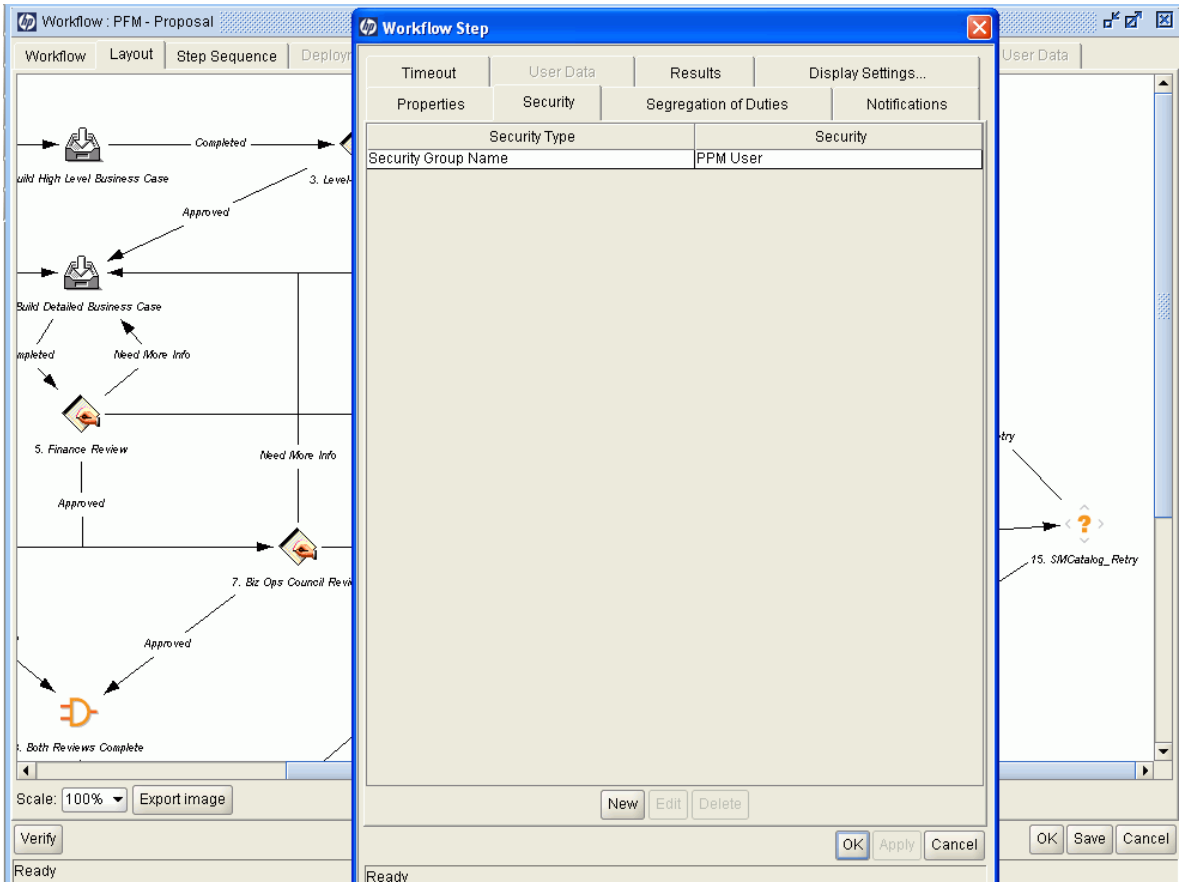
16. Click **New**. In the Decision dialogue box, create a new workflow step source `SMCatalog_Retry`.



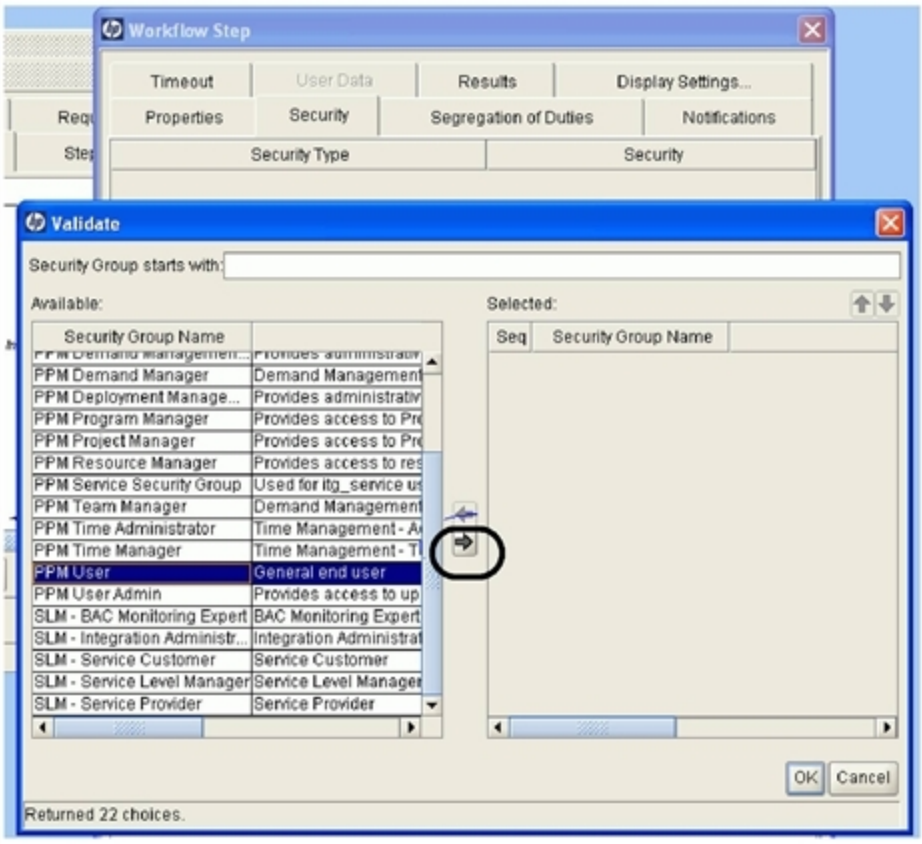
17. For the Validation field, click **New** to create a new validation `SMCatalog_Retry` for the SMCatalog_Retry workflow step resource, and click **New** to add two entries in Validation Values as shown below.



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.

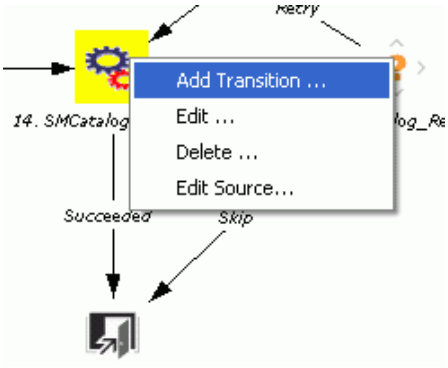


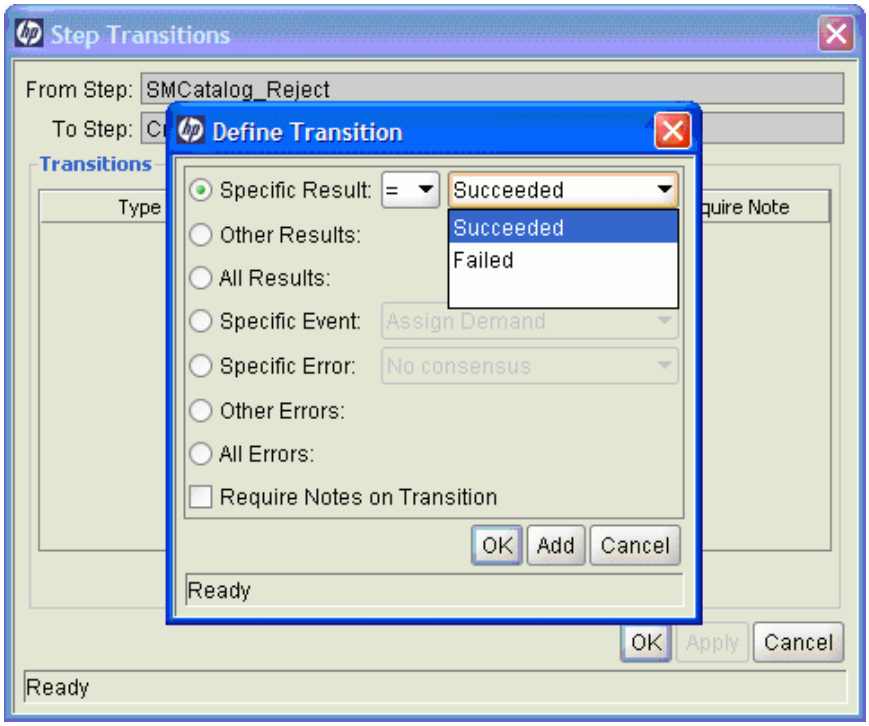
19. Click **Security** and then click **New**. For the Security Group field, select **PPM User**from the pop-up window and click the right arrow to add **PPM User** to Security Group.



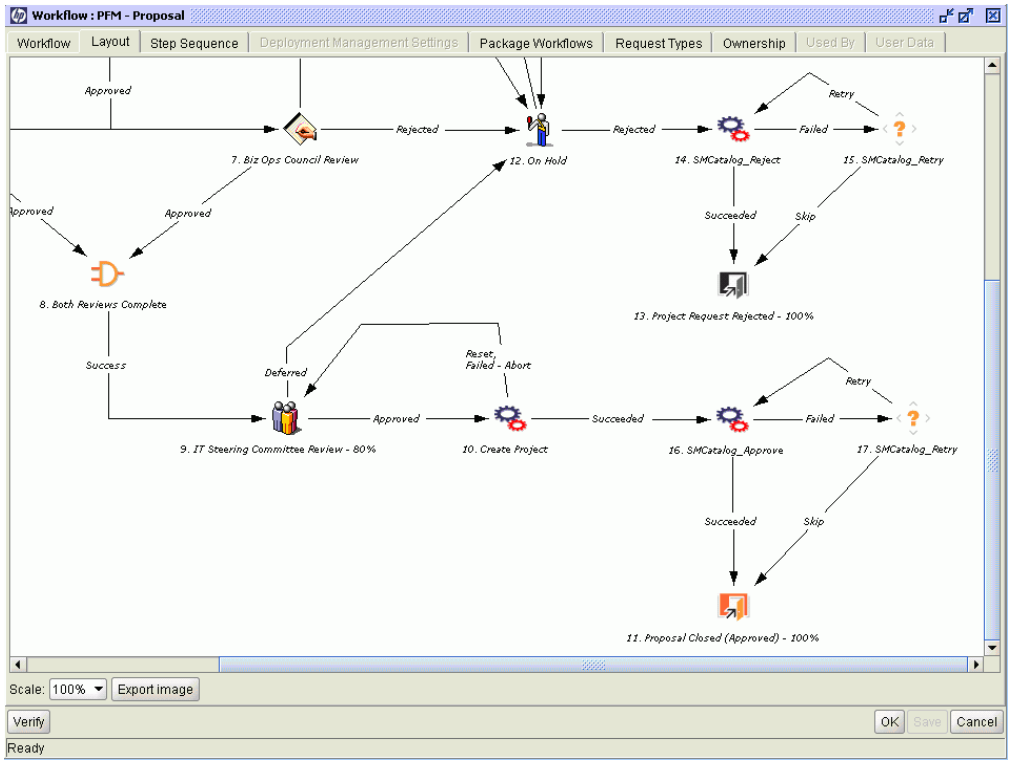
20. Click **OK** in the Validate and Workflow Step windows. PPM User is added to Security Group.

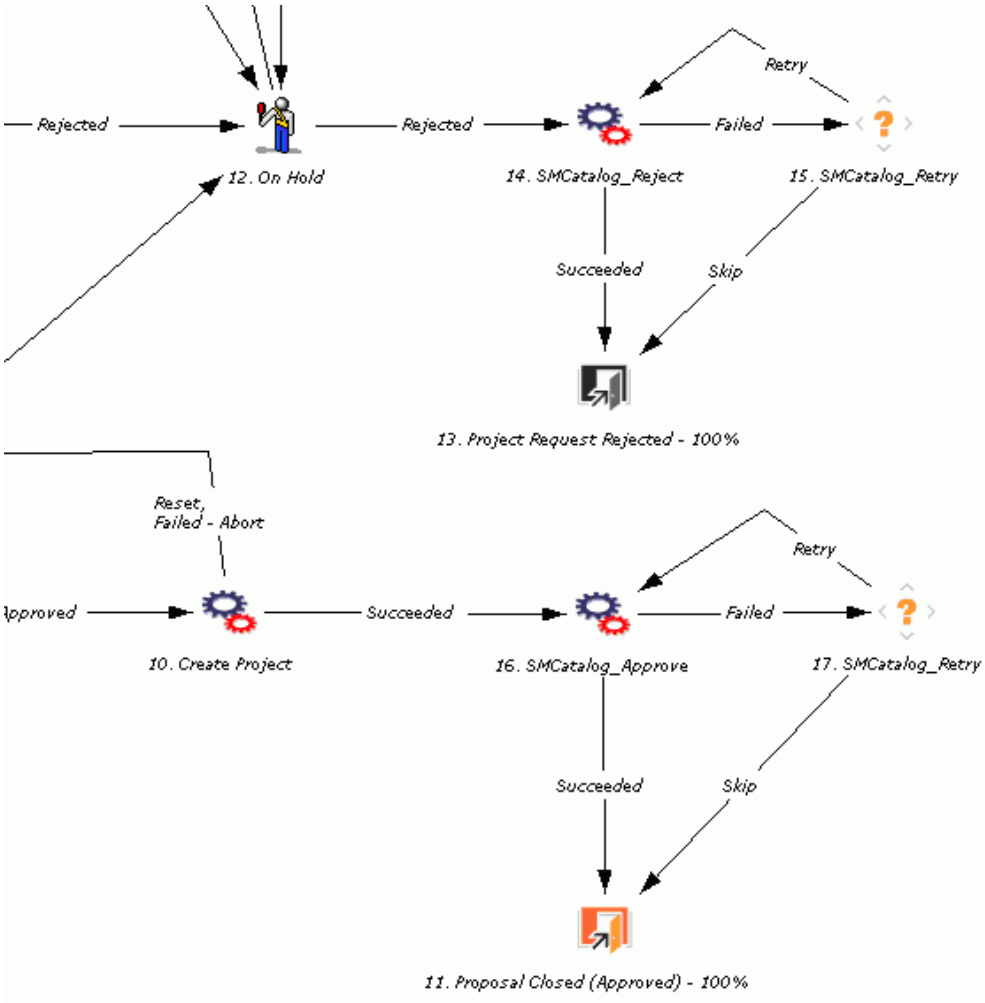
21. To add transitions between workflow steps, right-click a step, and select **Add Transition**from the menu.





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.

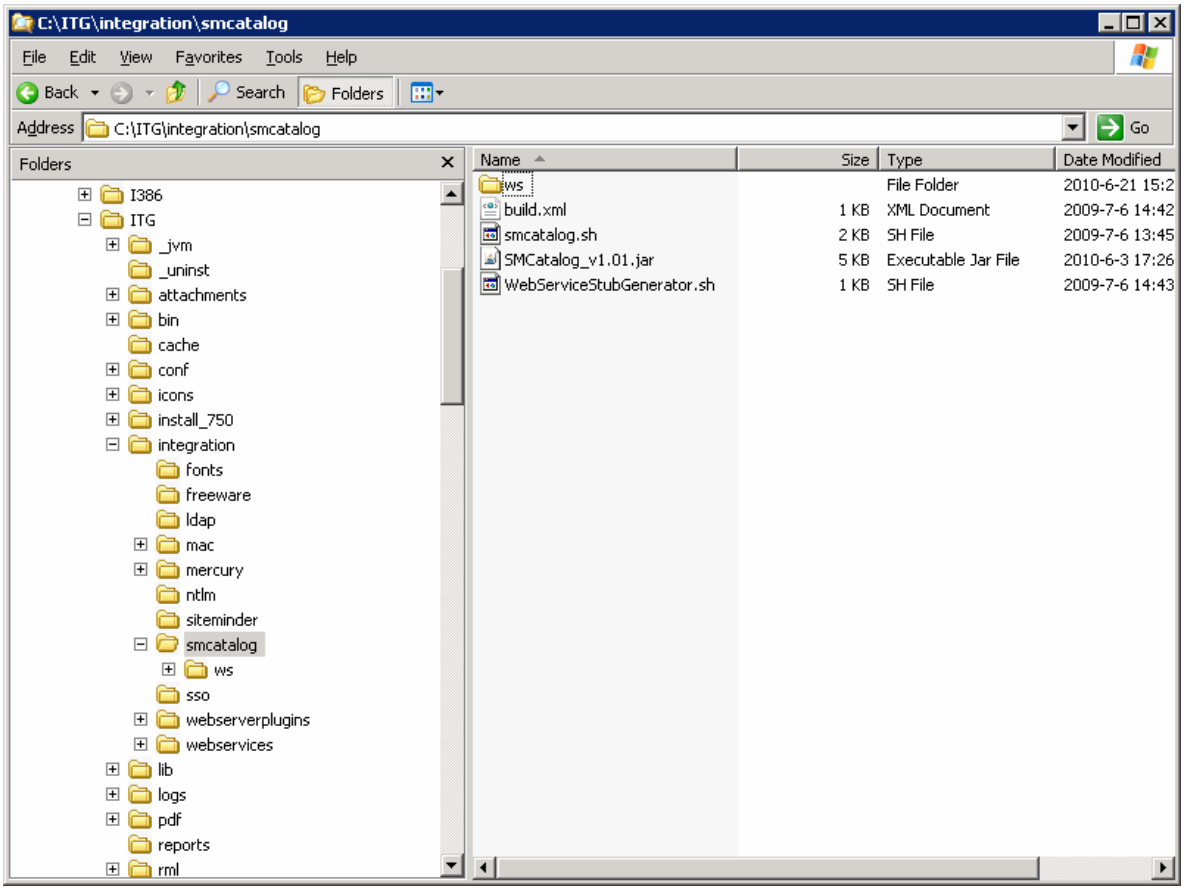




Configuring the PPM Server

Perform the following steps to configure the PPM server:

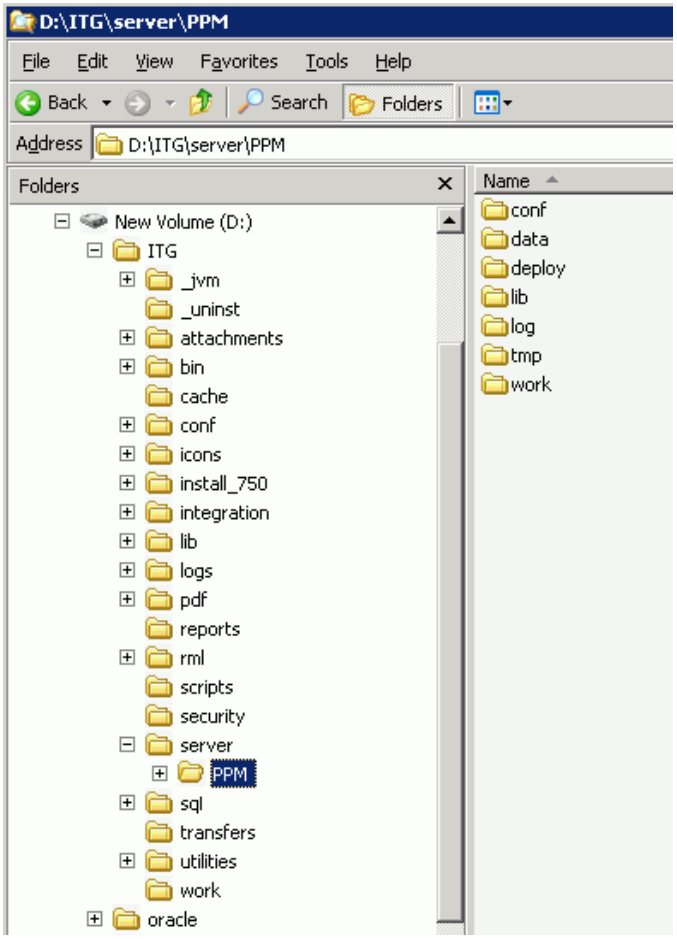
1. Create a folder smcatalog under <PPM_HOME>\integration. For example, C:\ITG\integration\smcatalog, and copy the SMCatalog_v1.01.jar, smcatalog.sh, WebServiceStubGenerator.sh and build.xml to the smcatalog folder.



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://smserver01:13080/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&K8ExOX~o<O./
2w+VuhR02|w*ybOloS?6e5UNv0>lueM~e=Hg~=w?@XCdN:d=a1dnv3m=
p|MnRxC9/L:M/>dR6Mc&~/,5dcdVq&s$LWEgu>*|U*_{zoU>i|^h>
lgJpe3bBc+F $mulld4xo?wSUIQE$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

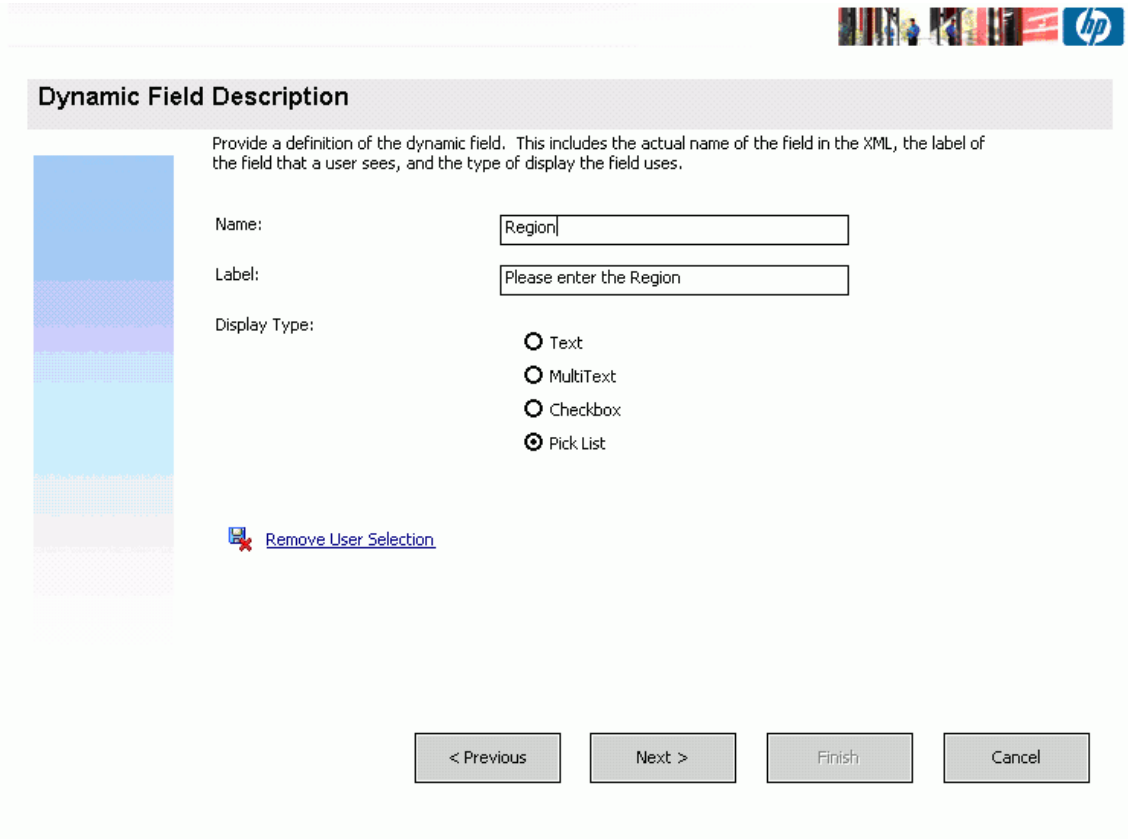
To upgrade the SM Service Catalog-PPM Center Project Proposal Integration Solution from v1.00 to v1.01, perform the following steps:

1. Log in to Service Manager as a System Administrator.
2. Load the <Release_Package>/SMPPM/SM_unload/smis_SMCatalog_PPMProjectProposal_v1.01.unl file into Service Manager.
3. Re-configure the PPM Workbench. Refer to "Configuring the PPM Workbench" on page 11 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 30 for detailed instructions.

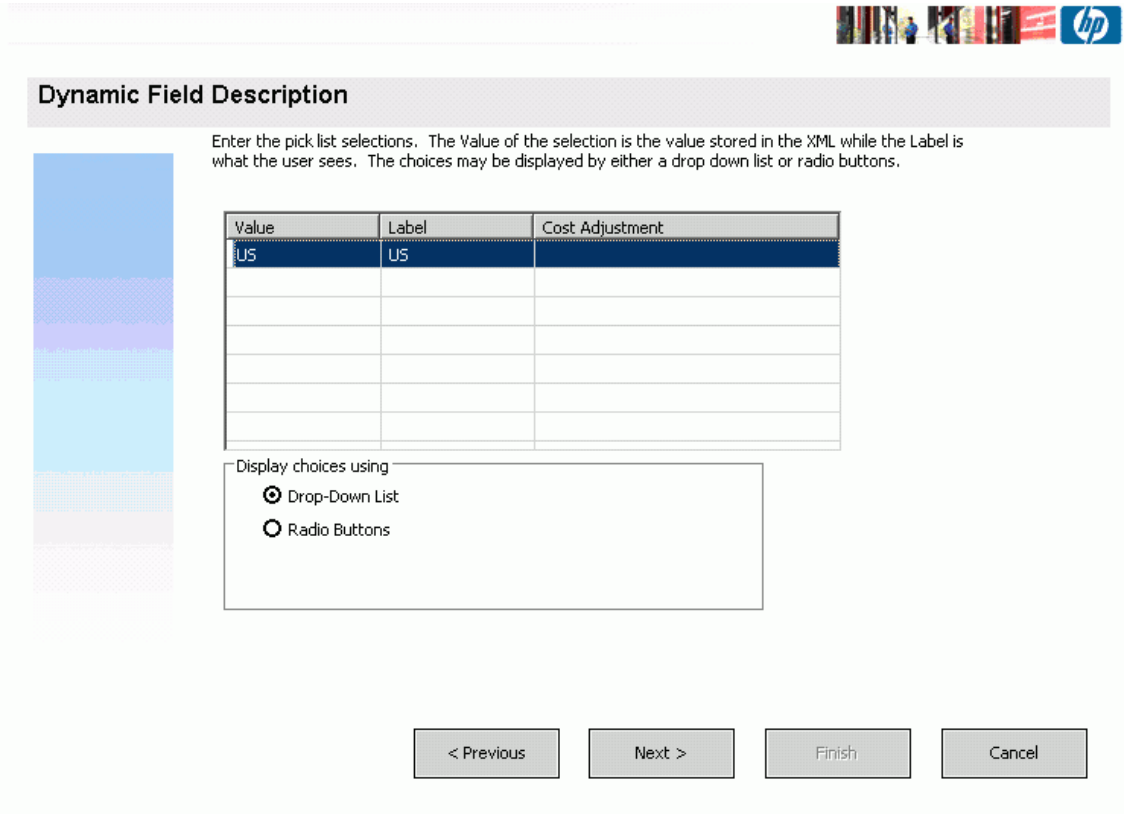
Appendix A: Customizing SM Project Proposal Catalog Item Fields

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 form opens.
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.
4. 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.

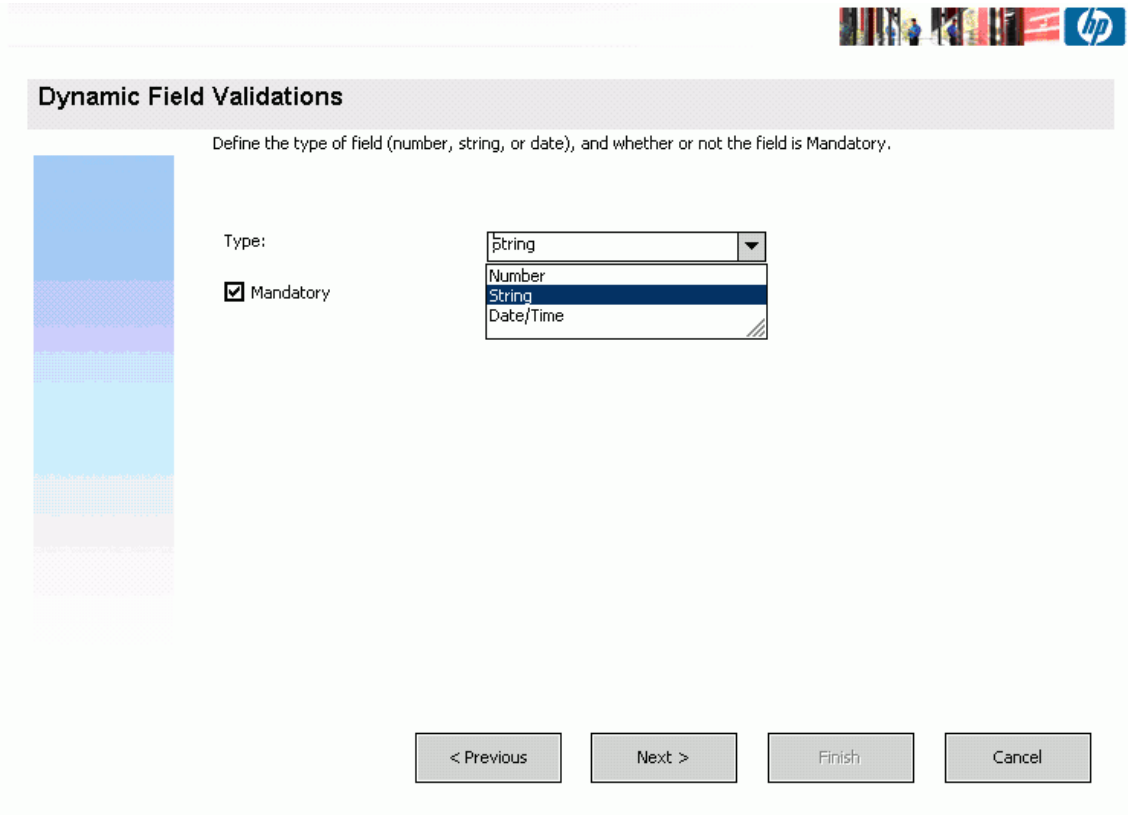


b. Click **Next**.
In the value list table, provide optional values for the Region field. The values added will be available in the Project Proposal Catalog Item drop-down list for users to select.



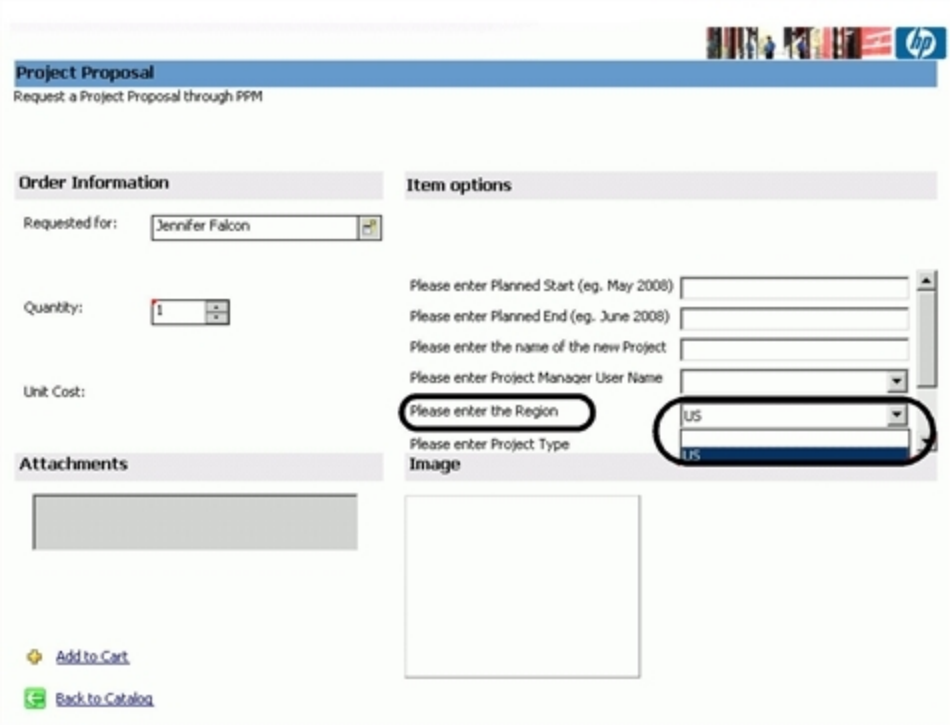
Note: The value provided in the Value column must be the same as that in the PPM field on the web page.

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

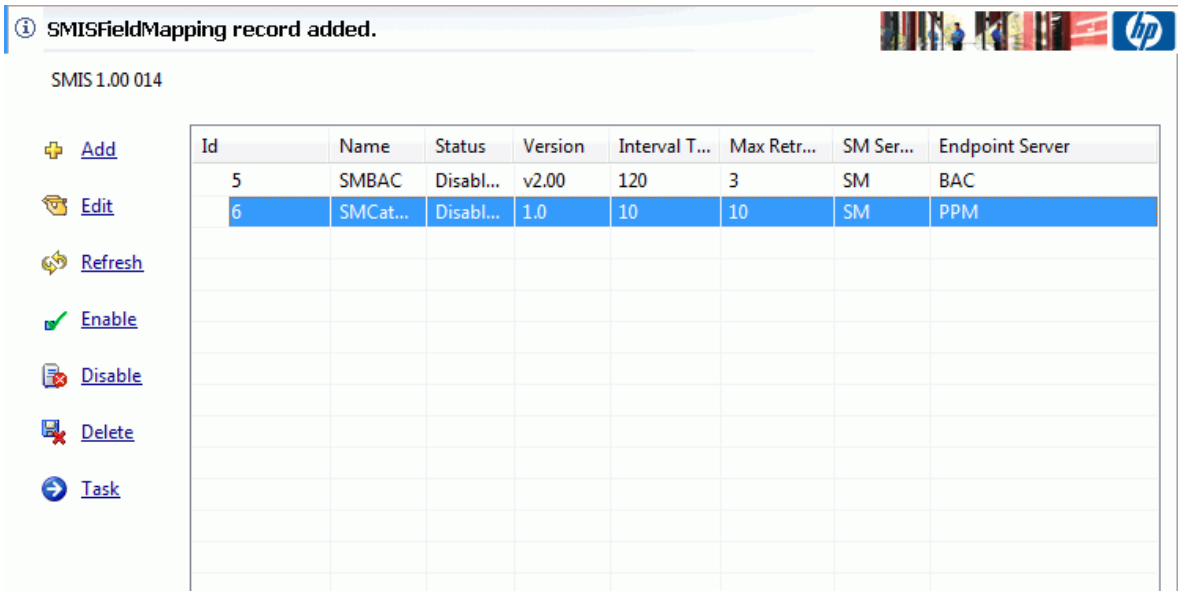


d. Click **Next** to finish the wizard.

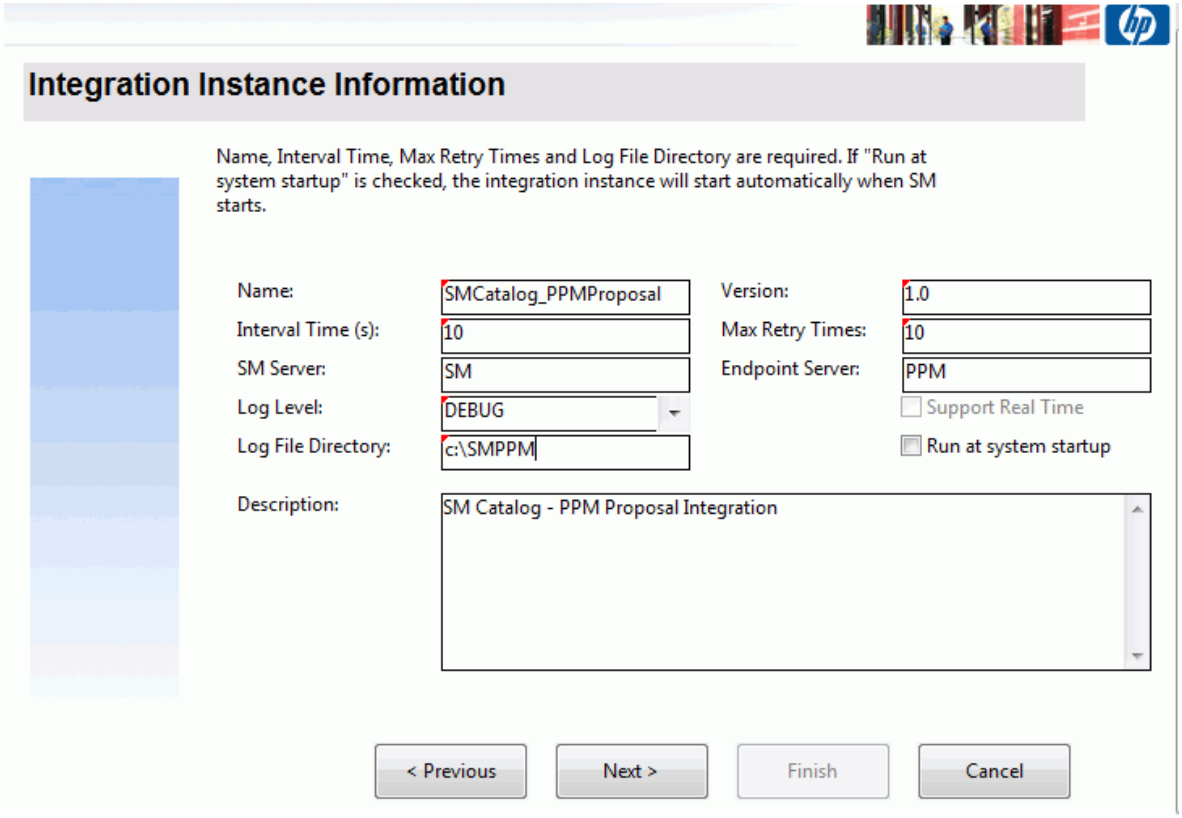
e. Click **Save**. Now the **Please enter the Region** field is added in the Project Proposal Catalog Item.



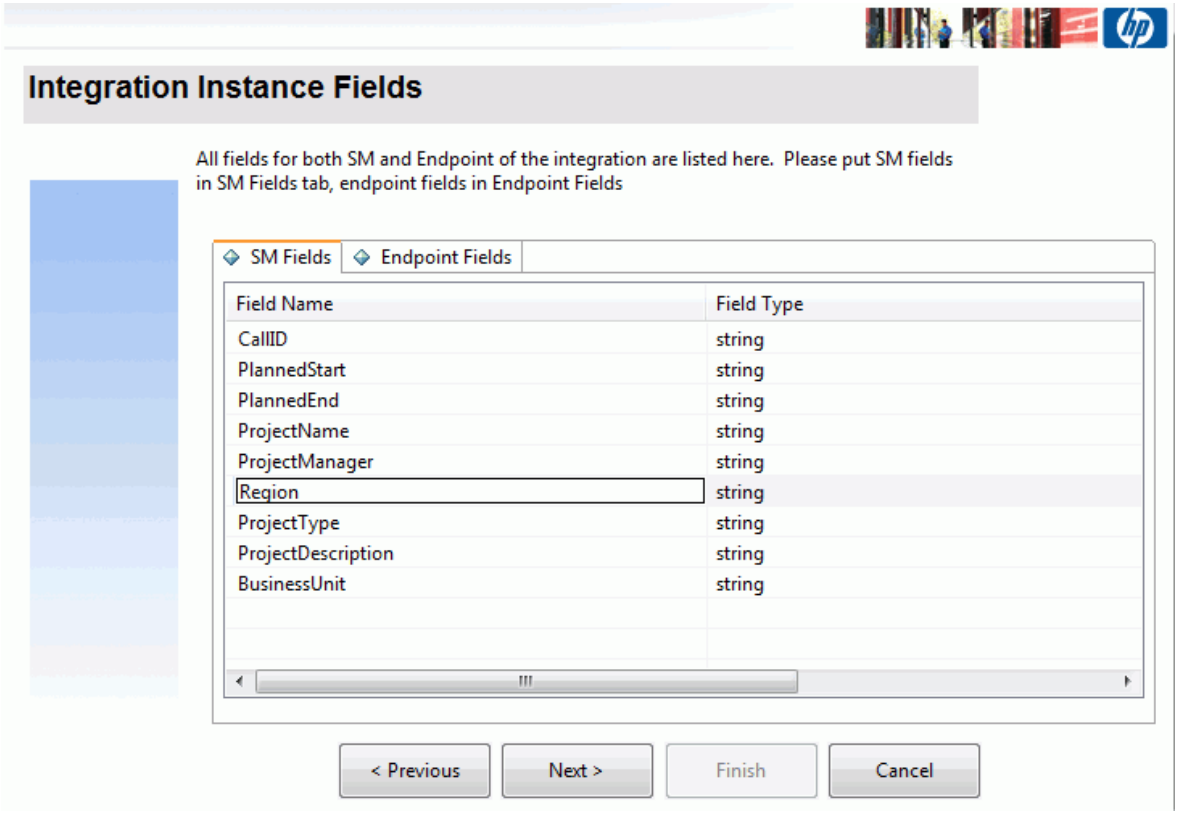
5. After the custom fields are added to the Project Proposal Catalog Item, configure the fields mapping in the SMIS framework. To do so, go to **Tailoring** > **Integration Manager**.



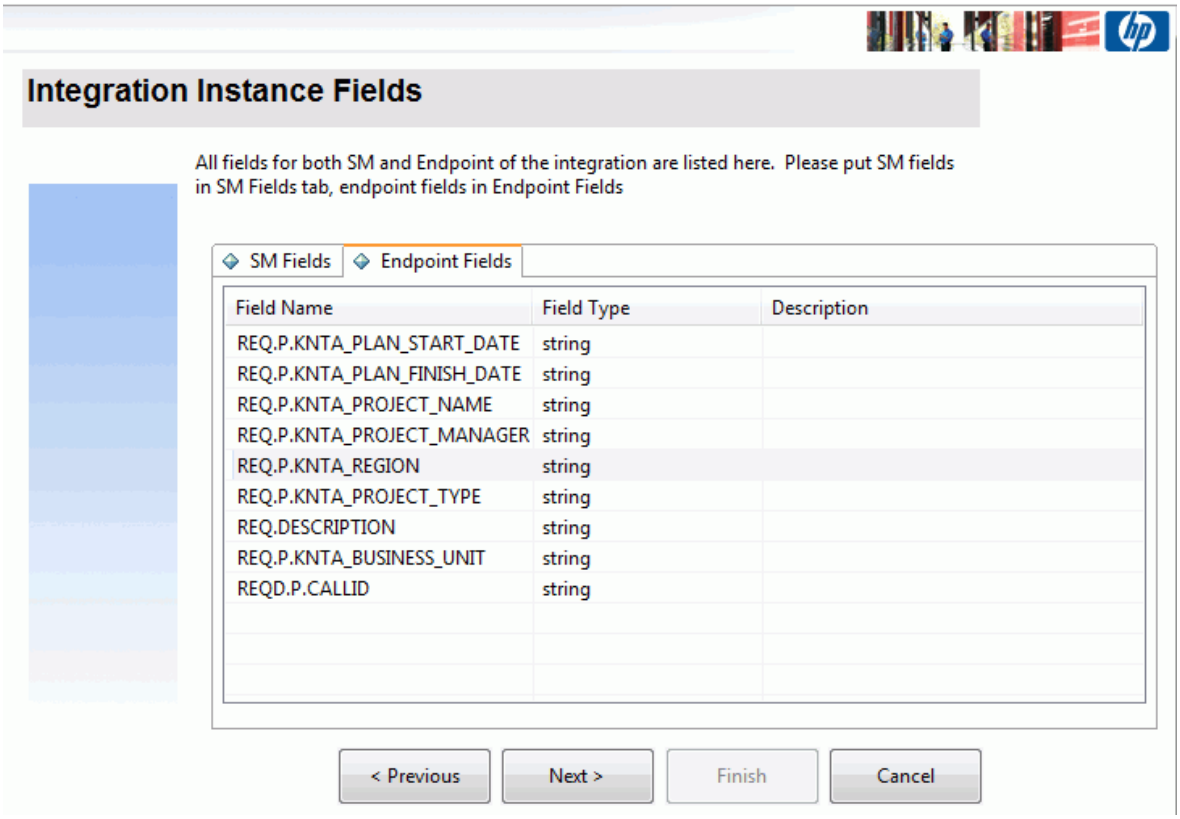
6. Double-click the **SMCatalog_PPMProjectProposal** entry.



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.

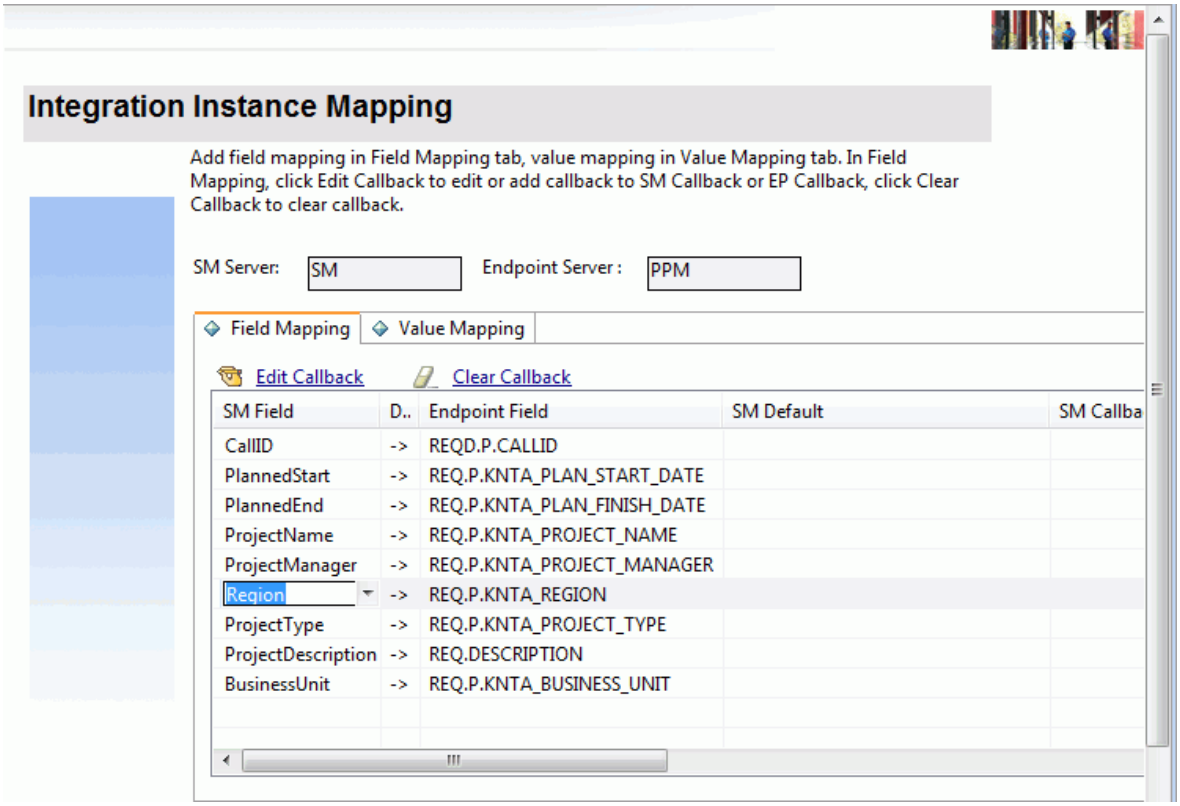


10. Click the **Endpoint Fields** tab, and add PPM fields that map to the fields added to the Project Proposal Catalog Item. For example, **REQ.P.KNTA_REGION** is a field in PPM mapping to **Region** of the Service Manager Project Proposal Catalog Item.



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.



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

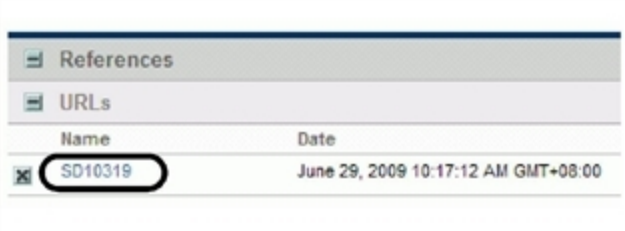
Issue 1

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:



- 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>
```

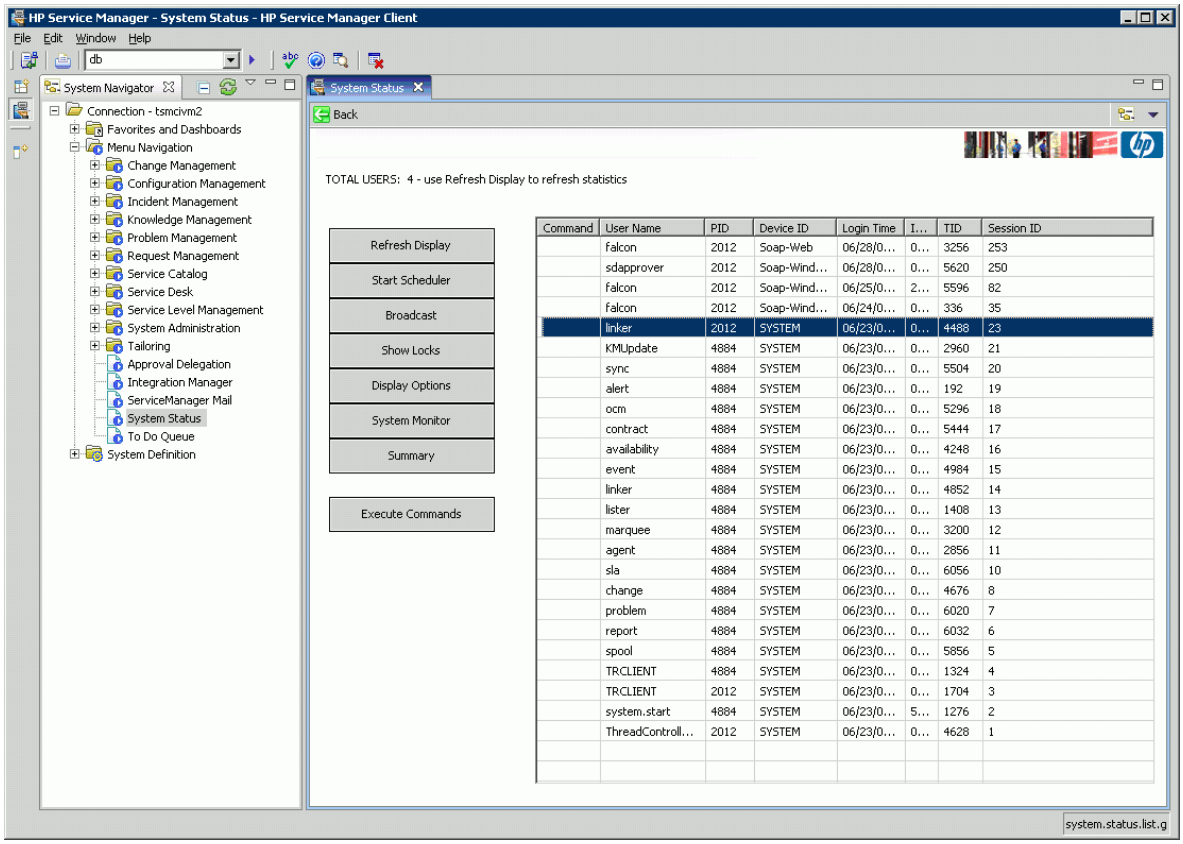
- Value for the server host is the machine name.

```
<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>
```

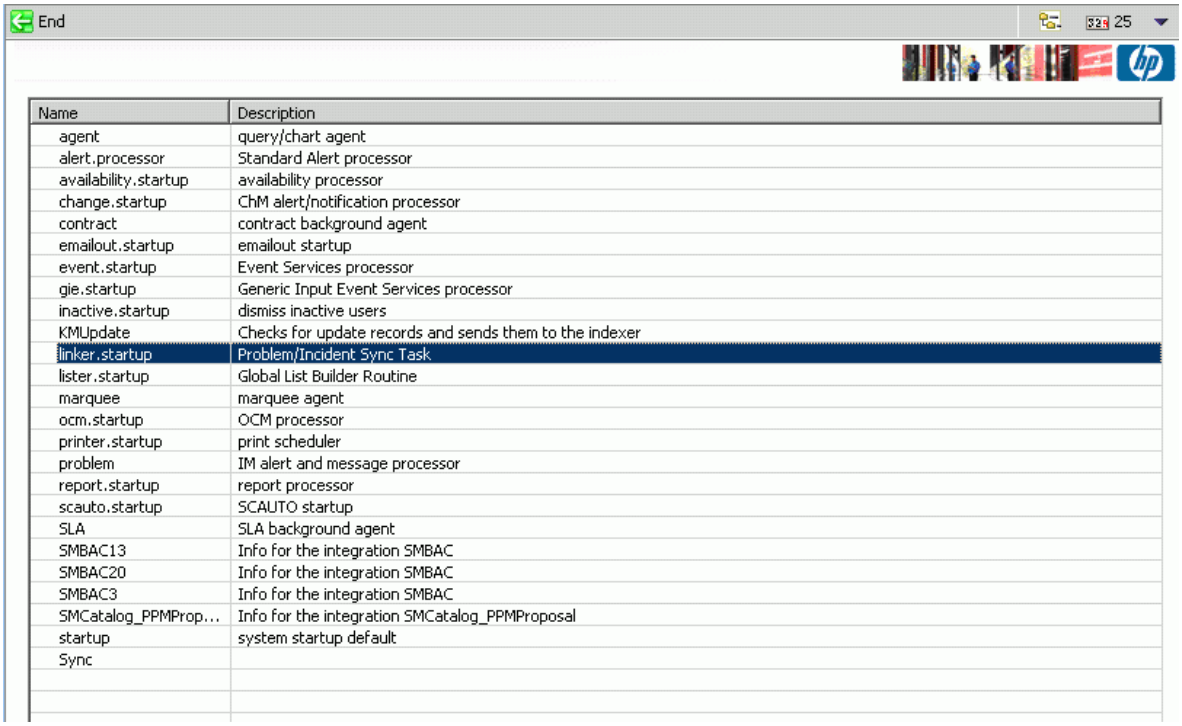
Issue 3

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.

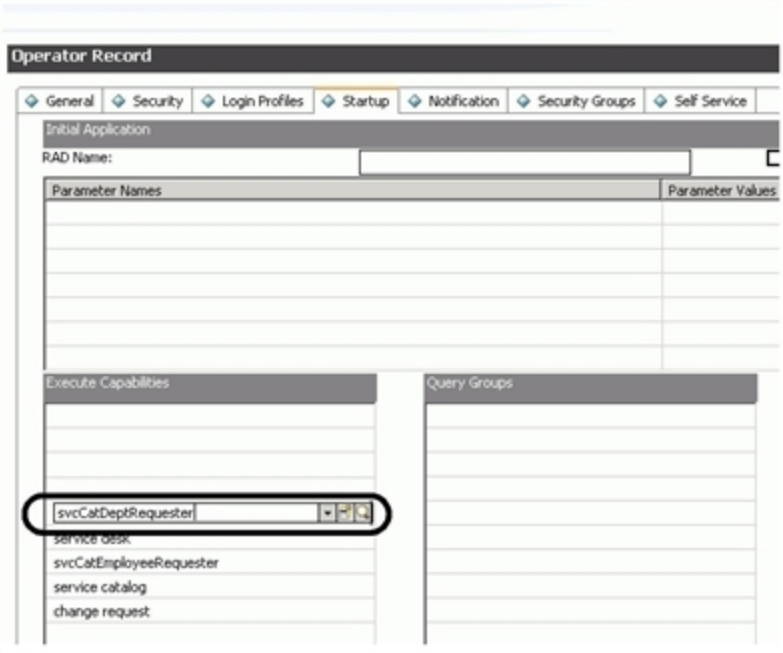


2. If the entry does not exist, click **Start Scheduler** and then double-click **linker.startup** to start the linker scheduler.



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_PPMProp...	Info for the integration SMCatalog_PPMProposal
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.



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

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We appreciate your feedback!

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