



Project and Portfolio Management Center

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Deployment Management User's Guide

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Chapter 1: Getting Started with Deployment Management

- ["Introduction to Deployment Management" below](#)
- ["Overview of an Deployment Management Process" below](#)
- ["Related Documents" on page 17](#)

Introduction to Deployment Management

Deployment Management is an Project and Portfolio Management Center (PPM Center) product that automates the migration and deployment of software code, configurations, and content. Deployment Management groups these objects into packages and routes the packages along business processes modeled in HPE's configurable workflow. The workflow automatically moves each package through required steps, which typically include system build, testing, quality assurance, staging, and final deployment.

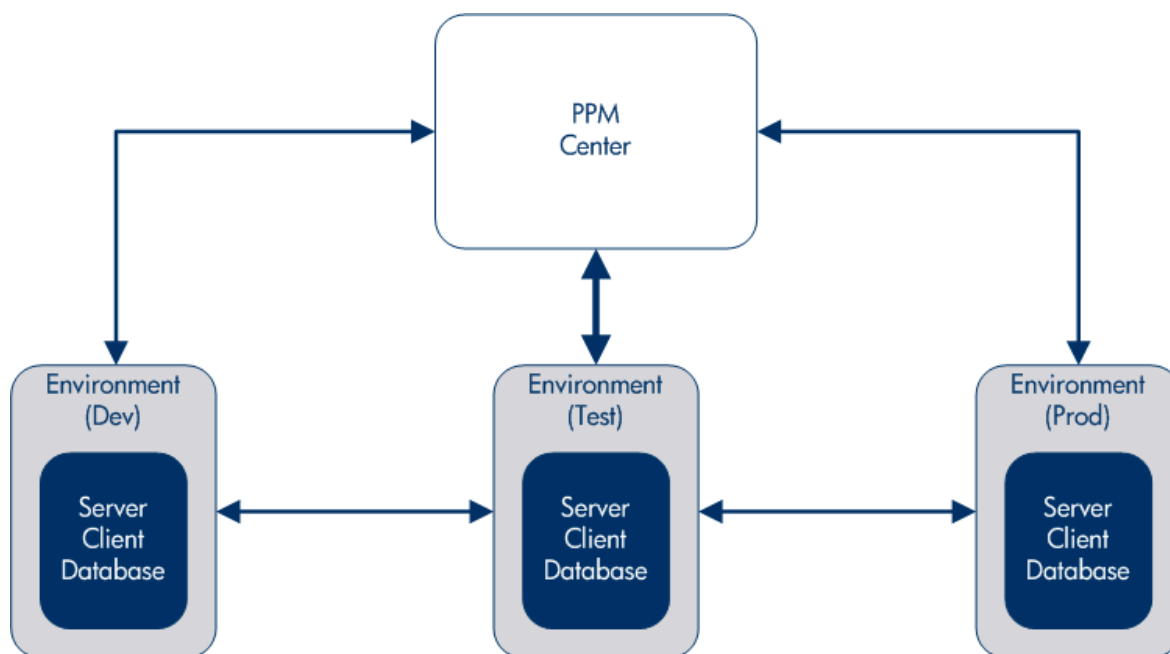
Deployment Management automatically deploys the application components (such as XML content, HTML files, Java™ programs, and Oracle application configurations) that each package requires. For example, Deployment Management connects to the development environment, copies Java files from the version control repository, and transfers the files to the quality assurance environment. It then uses the Java compiler to compile and pack all of the files into a single Java program. The customer can use a built-in scheduler to schedule deployments. Deployment Management maintains an audit trail for all activities, including package information, application components altered, approvals obtained, and deployments performed.

Overview of an Deployment Management Process

Deployment Management is an enterprise application designed to deploy and audit software changes to mission-critical applications. It does this by gathering all information required for a successful deployment (for example, information on environments and objects to be migrated) into a single logical unit called a *package*.

The package is the fundamental work unit in Deployment Management. A package consists of the objects that are processed through a business workflow. This results in a successful, easy-to-track software change.

Figure 1-1. Deployment Management overview

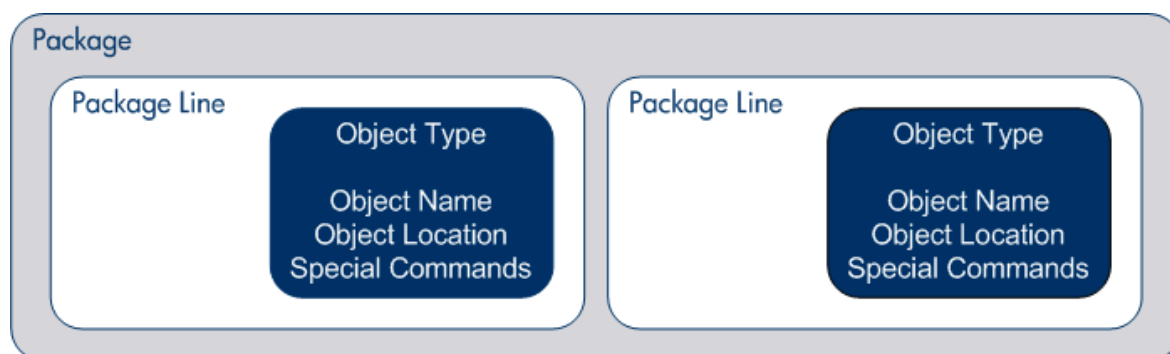


A package consists of a group of objects, each of which belongs to an object type. Each object type is associated with a set of parameters that defines the information the package requires, and any additional information it can accept.

For a more complete overview of packages, see ["Understanding Packages" on page 18](#).

For example, the File Migration object is a standard object type that copies files (objects) from one environment to another.

Figure 1-2. A package



Although each package line can be acted upon separately, the group of package lines and objects represent a logical unit that is moved and tracked as a unit. The way a package is processed depends on the specific workflow applied to it. "Figure 1-3. Sample package in the Package window " below shows a sample package in the Package window of the Package Workbench.

Figure 1-3. Sample package in the Package window

Package: 30003

Package Information

Package No.: 30003 Package Group: Created By: Admin User

Description: path test Created On: July 2, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: New

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 50

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Seq	Object Type	App Code	1	2	3
1	File Client->Client	(None)	Client File Name: test	Sub Path: test	File Type: AS
2	File Migration	(None)	File Location: Server	Sub-Path: test	File Name: te
3	RCS Server File	(None)	File Name: server file	RCS Dir: path	RCS Comme

New Line Edit Line Copy Line Remove Line

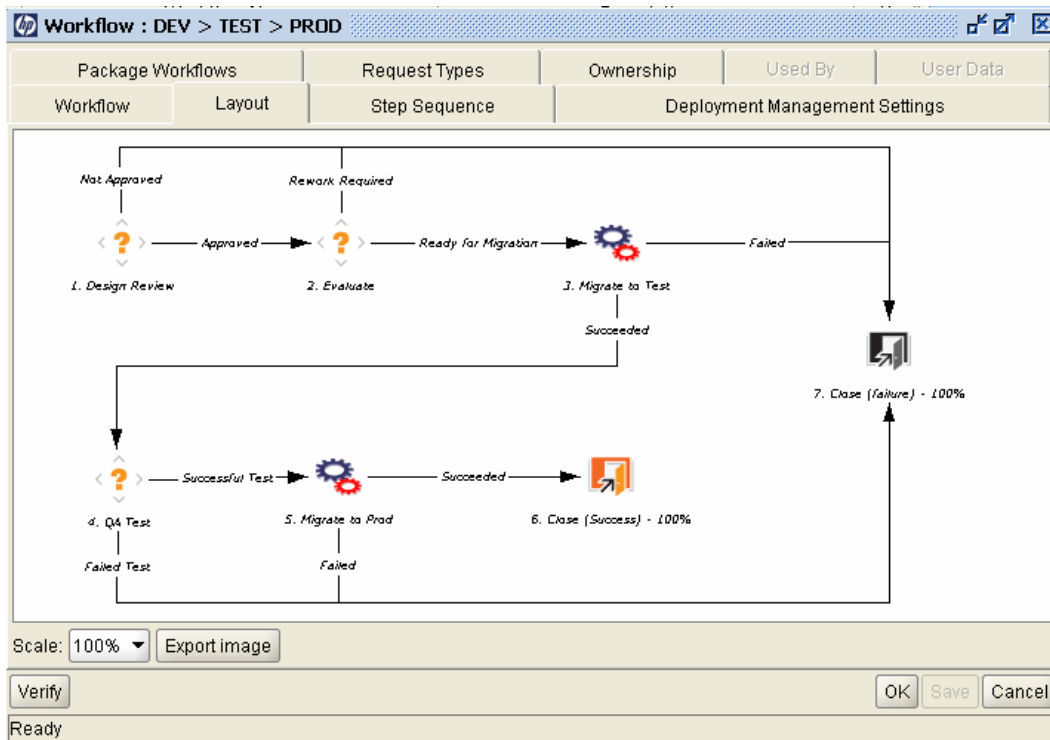
Submit OK Save Cancel

Ready

A workflow represents the business process associated with the package. Workflows consist of a logical series of steps that define the path that the objects in a package follow. Some of those workflow steps might represent decision-making processes; for example, code reviews and management approvals. Usually, at least one workflow step represents, or actually performs, the migration of the objects from one environment to another environment.

In "Figure 1-4. Package workflow" on the next page, the workflow step Migrate to Test represents the migration of package objects from one environment to another. The workflow steps Design Review and Evaluate represent business package-related decisions.

Figure 1-4. Package workflow



Deployment Management Terms and Concepts

- ["Standard Interface, PPM Workbench, and Deployment Management " below](#)
- ["Packages and Object Types " on the next page](#)
- ["Workflows and Workflow Steps " on page 13](#)
- ["Releases" on page 14](#)
- ["Deployment Management Environments" on page 15](#)
- ["Integrating Deployment Management" on page 16](#)

Standard Interface, PPM Workbench, and Deployment Management

Deployment Management provides two different interfaces for working with packages. In the standard interface, Deployment Management provides the package detail page. In the PPM Workbench,

Deployment Management provides the Package Workbench. Although these two interfaces have common functionality, a package detail page does not have all of the functionality of the Package Workbench.

The key difference between the Package Workbench and the detail page for a package is that you can use the Package Workbench to add package lines and submit a package. You cannot add package lines and submit a package from a detail page.

The Package Workbench is designed to allow engineers or developers to create and submit packages. Creating and submitting packages requires specialized knowledge. In some cases, it requires passwords to production servers. Some of this information is not available to the resources making decisions about a package. Additionally, not everyone who makes decisions about a package requires access to the PPM Workbench.

Note: For instructions on how to create and submit packages to deploy software and application changes, see ["Creating Packages" on page 40](#).

From a package detail page, and with the required permissions, you can process a package through its workflow. You can add notes and references to the package and make decisions about package status. However, you cannot change or delete a package from the detail page.

Note: For information about the licenses and access grants required to work with packages in Deployment Management, see the *Security Model Guide and Reference*. For information on how to move packages through their associated workflows, see ["Processing Packages" on page 73](#). For instructions on how to work with (copy, cancel, merge, and so on) packages, see ["Managing Packages" on page 100](#).

Packages and Object Types

Packages are the fundamental work units of Deployment Management. A package consists of the objects that are processed through a business workflow.

While each package line can be acted upon separately, the group of package lines and objects represent a logical unit that should be moved and tracked together. The processing of a package and package lines can vary greatly depending upon the workflow specified for that package. ["Figure 1-5. Sample package in the Package window " on the next page](#) shows a sample package in the Package window.

Figure 1-5. Sample package in the Package window

The screenshot shows a window titled "Package: 30003". It contains a "Package Information" section with various fields and a "Package Lines" section with a table.

Package Information:

- Package No.: 30003
- Package Group: [empty]
- Created By: Admin User
- Description: path test
- Created On: July 2, 2012
- Workflow: (REFERENCE) Dev -> Test -> Prod
- Package Status: New
- Assigned User: Admin User
- Priority: Normal
- Parent: [empty]
- Assigned Group: ITG User
- Package Type: Customization
- Priority Seq: 50
- Percent Complete: 0

Package Lines:

Seq	Object Type	App Code	1	2	3
1	File Client->Client	(None)	Client File Name: test	Sub Path: test	File Type: AS
2	File Migration	(None)	File Location: Server	Sub-Path: test	File Name: te
3	RCS Server File	(None)	File Name: server file	RCS Dir: path	RCS Comme

Buttons at the bottom: Submit, New Line, Edit Line, Copy Line, Remove Line, OK, Save, Cancel.

Each object belongs to an object type. An object type can also have associated commands that determine its behavior as it moves from one environment to another. Commands are used to define what a migration means for each type of object. For example, a File Object Type might only require that a file be copied, while a Database Script Object Type might require the copying of a file and executing it against the destination database.

Object types are user-configurable. Deployment Management and its extensions also provide libraries of predefined object types, falling under one of the following categories:

- **Standard Objects.** Standard objects are predefined object types that are shipped with Deployment Management or one of the Deployment Management Extensions. These object types encapsulate the basic functionality that manages crucial actions; for example, migrating and executing file system-level objects and operating system commands, or applying patches to an Oracle applications instance. A standard object type is the File Migration object, which copies a file from one environment to another. A more complex standard object type is the SQL Script, which not only copies the file but also runs the script against the destination database.
- **Custom Objects.** Customers must often customize standard object types, or produce entirely new object types, in order to handle the requirements of their software environments and deployment management processes. A custom objects category is provided to help distinguish these customized object types from those that come with Deployment Management or its extensions.

Such object types, designed by the customer or by consultants, are often used for integration with third-party tools or in-house products.

- **PPM Center Migrator Objects.** PPM Center migrator objects are object types that contain functionality to export and import configuration information. You can use these for several purposes, including:
 - To transfer configuration information between distinct PPM Center instances
 - To extract information from a PPM Center database schema into an XML file
 - To load information from an XML file into a database schema

This means that you can migrate configuration information using standard deployment management test practices, processing a package through a workflow.

Workflows and Workflow Steps

A workflow consists of a logical series of steps that define the path to be followed by objects in a package. Workflow configuration and routing can be customized, and the workflow engine can handle virtually any business practice. This allows a department to generate workflows to automate existing processes, rather than forcing users to adopt a new set of processes to perform their work.

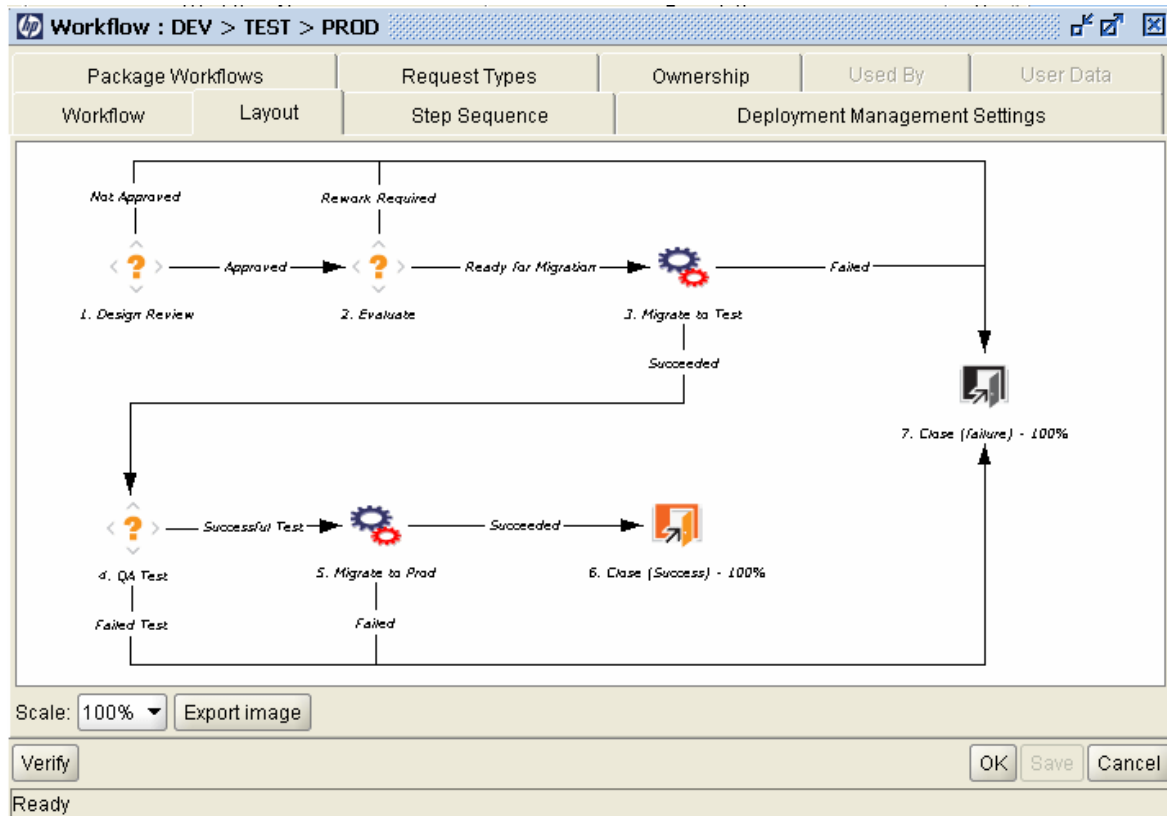
Workflow steps can range in usage from functional approvals to actual migrations. For example, migration steps automatically move specified objects from source environments to destination environments.

Workflow steps are events that are linked together to form a complete workflow. Deployment Management uses the following four types of workflow steps:

- **Decision workflow steps.** In decision workflow steps, you or group of users must indicate a result or outcome; for example, work is approved or a review is completed.
- **Execution workflow steps.** In execution workflow steps, the system performs an action, and then updates the step with its result. The action can be as simple as calculating the value for a token, or as complex as copying files, running programs, or updating Web pages.
- **Condition workflow steps.** Condition workflow steps are logic steps used for complex workflow processing; for example, allowing a workflow to proceed only after all prerequisite steps are completed.
- **Subworkflow workflow steps.** Subworkflow workflow steps are entire workflows that have been enabled for use as subworkflows. Subworkflows are useful time savers in modeling business processes that include predefined procedures.

"Figure 1-6. Package workflow" below shows a sample package workflow.

Figure 1-6. Package workflow



Releases

In Deployment Management, you can configure releases to group packages and related requests that must be deployed together. For example, the software company XYZ Corporation has a product update release scheduled for five months from now. To ensure successful product delivery, they decide to use Deployment Management to create a release that lets them track all changes to their original code.

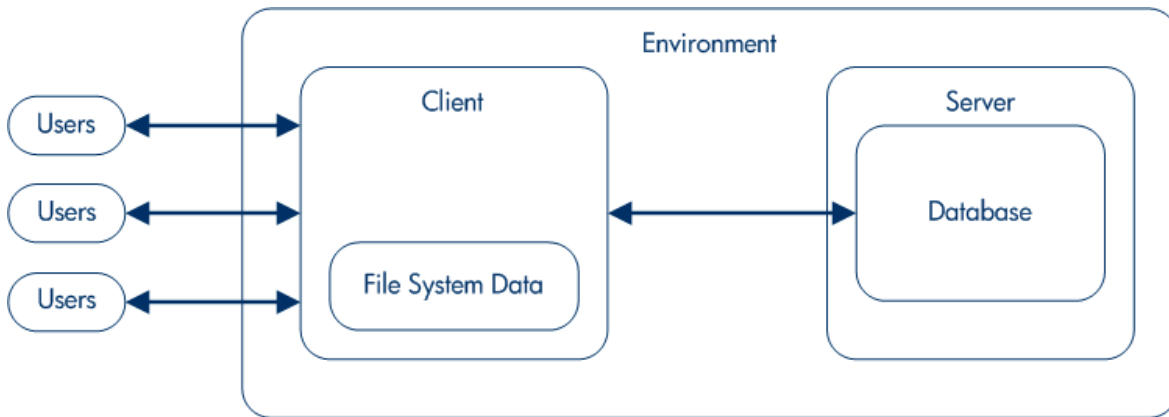
As developers complete their packages, the packages are included in the release and processed together. Because every required change is grouped in the release, the company can quickly and easily assess the product status and progress toward delivery.

For detailed information about releases, and how to create and configure them, see the *Deployment Management Configuration Guide*.

Deployment Management Environments

An Deployment Management environment is composed of a unique combination of server, client, database, and file system data that represent one logical group.

Figure 1-7. Deployment Management environment



The environment server represents the main host machine for the environment. This machine may be of any platform type; for example, UNIX or Windows . Typically, the server is a UNIX machine that also hosts the database for this environment.

The environment client represents a remote client machine that also serves to identify the specified environment. The client is typically defined if users are doing multiplatform development in a client/server environment, with some development done on UNIX, and some on Windows Server. The client can be a file server that stores client code accessed by users. Many programs, such as transactional forms, have both client and server components; for example, the user interface code and the database objects, respectively. ["Figure 1-8. Sample environment" on the next page](#) shows an example of information displayed in the Environment window.

Figure 1-8. Sample environment

The screenshot shows a software configuration window titled "Environment: Untitled1". It has a tabbed interface with "Host" selected. The "Environment Name" is "test_beta" and the "Description" is "test environment". The "Location" field is empty, and "Enabled" is set to "Yes". Below the tabs, there are three main sections: "Server", "Client", and "Database". Each section has a "Name" field set to "machine.name1.com" and a "Type" dropdown set to "UNIX (Generic)". The "Server" and "Client" sections also have "Username" (Bill), "Password" (masked with asterisks), "NT Domain", "Base Path" (/usr), "Connection Protocol" (Telnet), "Transfer Protocol" (FTP), and "Stream Encoding" (UTF-8). The "Database" section has a "Server Type" dropdown set to "Oracle Server" and fields for "Host Name", "Username", "Oracle SID", "DB Link", "JDBC_URL", "Connect String", "Password", "Port Number", and "Version". On the right side, there are checkboxes for "Enable Server", "Enable Client", and "Enable Database", all of which are checked. At the bottom, there is a "Check..." button and "OK", "Save", and "Cancel" buttons. The status bar at the bottom left says "Ready".

Integrating Deployment Management

Integration with Version Control

Deployment Management provides complete integration with all standard version control systems, including RCS, SCCS, PVCS, ClearCase, CCC/Harvest, and Visual SourceSafe. The Deployment Management outbound API provides all check-in, check-out, and promotion functions during deployment.

File system objects can be deployed to new installations and updated in version control simultaneously. This synchronizes your version control repository, physical installations, and Deployment Management workflows.

Integration with Demand Management

Deployment Management manages the physical deployment of changes to your application environment, but equally important, it also gathers and analyzes issues (requests) related to system

stability. To facilitate this request gathering, Deployment Management is integrated with Demand Management.

Like Deployment Management, Demand Management is a workflow-based system that features complete audit trail tracking of requests from submission to closure. The tight integration between Demand Management and Deployment Management allows packages to be automatically generated from requests.

The requests are then automatically updated upon package completion. This closed-loop integration ensures a coherent and consistent view of issue status and removes the need for redundant data across multiple applications.

Integration with Third-Party Applications through Deployment Management Extensions

Deployment Management Extensions are application-specific modules that automate the deployment and post-deployment steps of objects, files, and patches. Extensions are fully integrated with Deployment Management to provide a total solution for managing various enterprise applications. The following extensions are available:

- Deployment Management Extension for Oracle E-Business Suite
- Deployment Management Extension for Oracle Technology
- Deployment Management Extension for SAP Solutions

Related Documents

You can find related information in the following documents:

- *Deployment Management Configuration Guide*
- *Commands, Tokens, and Validations Guide and Reference*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*
- *HPE-Supplied Entities Guide*

Chapter 2: Understanding Packages

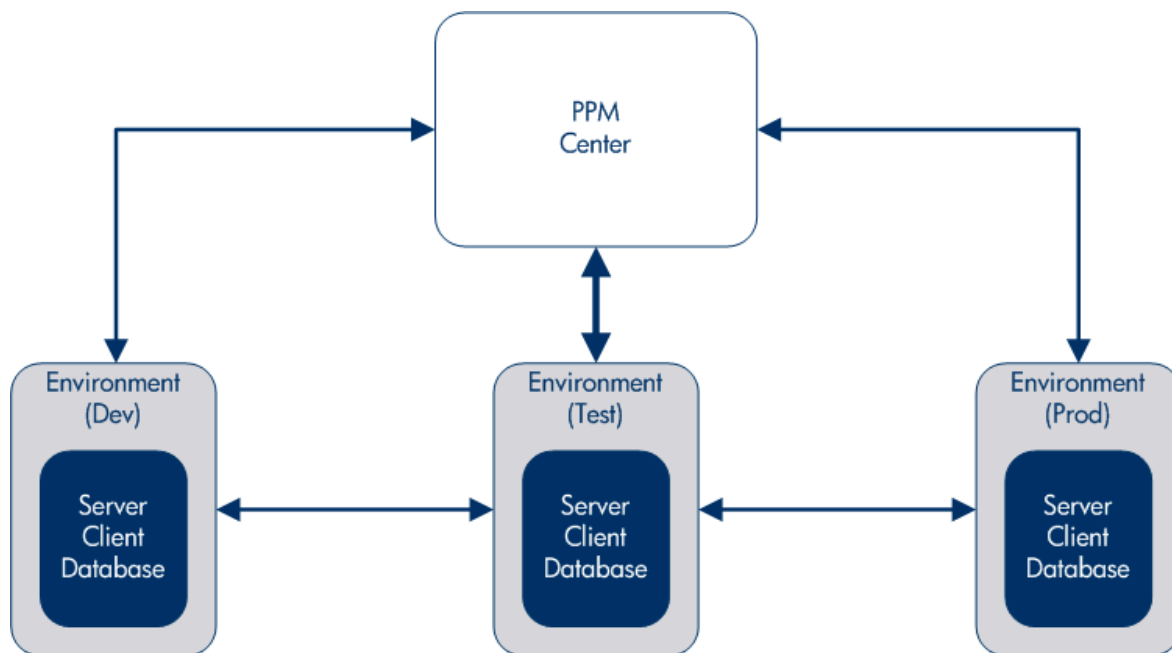
- ["About Packages " below](#)
- ["Packages in Standard Interface" on page 22](#)
- ["Packages in PPM Workbench " on page 26](#)
- ["Reference Relationships " on page 35](#)

About Packages

Deployment Management automates the migration and deployment of software code, configurations, and content. These objects are grouped into packages and are routed along business processes (workflows) using the PPM Workbench and the standard interface. Workflows automate the movement of each package through their required steps.

For example, you want to copy an operating system patch from the development environment, Dev, to the test environment, Test. After the operating system patch is thoroughly tested, you can copy the patch to production environment, Prod.

Figure 2-1. Package processing in Deployment Management



A package is the fundamental work unit of Deployment Management. Each package follows a workflow (business process). As with any business process, decisions are made and actions taken that affect the package. Each decision or action becomes a workflow step.

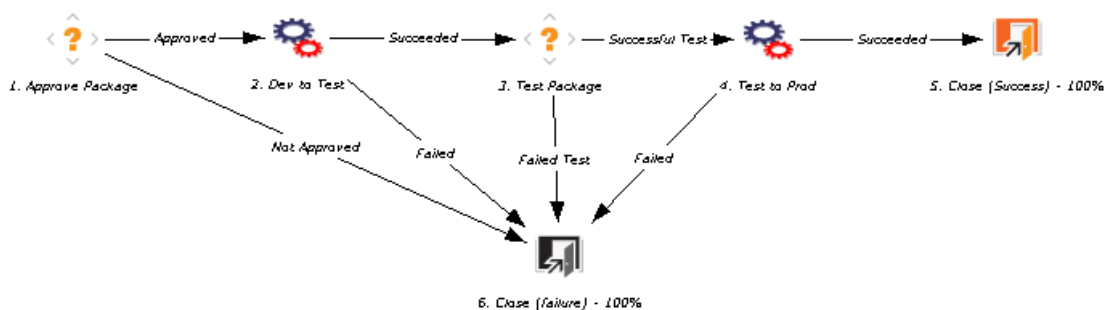
If a decision on a package is required, you must manually update a workflow step to reflect that decision. However, you can configure some actions (for example, migrating a file from one environment to another) to occur automatically. The basic components required to configure a workflow step to automatically migrate a file from one environment to another environment are as follows:

- A package, which defines the file name, location, and type, and the workflow to apply.
- A workflow, which determines the conditions that trigger file migration (workflow step), and the source and destination environments for the file migration.

When you create a package, you assign it a single workflow that defines the steps the package must take. "Figure 2-2. Package workflow and workflow steps " below shows a sample workflow, with the following steps:

- Approve Package
- Dev to Test (migration)
- Test Package
- Test to Prod (migration)
- Exit

Figure 2-2. Package workflow and workflow steps



You must perform the Approve Package and Test Package workflow steps manually during the course of the workflow. You configure the Dev to Test and Test to Prod workflow steps to run automatically.

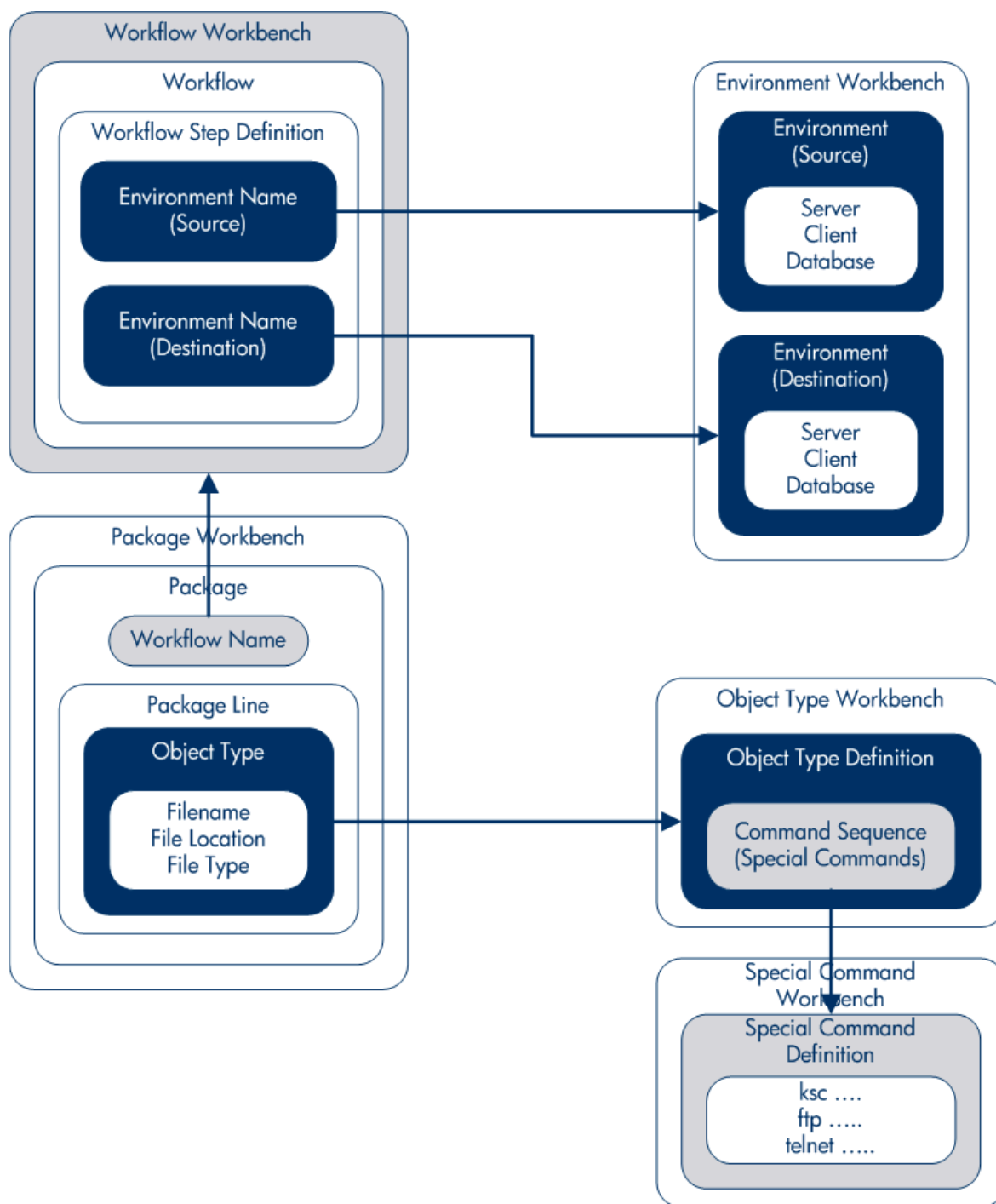
Note: To assign a workflow to a package, you do not need to know how to configure a workflow step, or even a workflow. However, you do need to know how to access the information in a

workflow, workflow step, and environment.

In "Figure 2-3. How a package comes together " on the next page, the package displayed in the Package Workbench is associated with a workflow in the Workflow Workbench. The migration workflow steps are configured with source and destination environments. You access and configure environments using the Environment Workbench.

The package in "Figure 2-3. How a package comes together " on the next page is configured with a single package line, and then configured with an object type. A package line can contain only one object type. The object type contains the information required to migrate a file (an object), including the file name, location, and type (ASCII or binary). Depending on the object type definition, additional information may be required.

Figure 2-3. How a package comes together



Object types are defined in the Object Type Workbench. In the Object Type Workbench, you can open and access the command sequence used to migrate the object across environments. These command sequences include special commands defined in the Special Command Workbench.

To create a package, you must know the following:

- **Workflow.** Defined in the Workflow Workbench.
- **Environments.** Specified in the workflow step and defined in the Environment Workbench.
- **Object type.** Defined in the Object Type Workbench.

For information about the licenses and access grants required to work with packages in Deployment Management, see the *Deployment Management Configuration Guide*.

Packages in Standard Interface

You can use the package detail page in the standard interface to view information for a package, add notes and references to the package, and process the package through its workflow. When you add a new package as a reference to a request, you do not access the Package window in the PPM Workbench. Instead, you access a New Package page in the standard interface.

Creating a new package using the New Package page does not create a complete package that you can submit. Instead, the New Package page opens and saves a package in the standard interface. Before you can submit the package, you must use the Package window in the PPM Workbench to add package lines to it. "Figure 2-4. Package detail page " on the next page shows the detail page for a package that was created from the standard interface as a reference to a request, and contains no lines yet.

Figure 2-4. Package detail page

Package 30008

SaveReset

Header

*Package No.:

30008

Package Group:

Created By:

Joseph Banks

Description:

Package Workplan

Created On:

January 18, 2016

Workflow:

Package Workplan

Status:

New

Assigned User:

Priority:

Low

Parent:

Assigned Group:

Package Type:

Customization

Priority Seq:

50

Percent Complete:

0

Status

View Lines:

Pending Lines Only

All Lines

View Steps:

Steps Waiting my Action

All Steps

Refresh

View All Lines

Seq	Object Name	Object Type
This package does not have any Lines to show.		

Check All

Clear All

Line Details

View Log

View Eligible Steps for Package Workplan

Check All

Clear All

Workflow Action

Notes

Notes to be added on save:

References

Reference Additions

New Reference:

Attachment

Add

References to be added on Save:

Open

Remove

SaveReset

Package Detail Page, Header Section

On the detail page for a package, the **Header** section displays general information such as who created the package, the date it was created, and its associated workflow. "Figure 2-5. Package detail page, Header section " below shows a typical **Header** section.

Figure 2-5. Package detail page, Header section

Header

*Package No.:

30030

Package Group:

Created By:

Admin User

Description:

Dev to Test - sql and html File Migration

Created On:

December 10, 2008

Workflow:

Standard Deployment

Status:

In Progress

Assigned User:

Priority:

Low

Parent:

Assigned Group:

Package Type:

Customization

Priority Seq:

50

Percent Complete:

0

Package Detail Page, Status Section

The **Status** section on a Package detail page displays the current package status. After a package is first created in the standard interface, the **Status** section does not exist. After the package is submitted, the **Status** section displays the package lines and all of the steps in the associated workflow. "Figure 2-6. Package detail page, Status section " below shows the **Status** section on a package detail page.

Figure 2-6. Package detail page, Status section

Status					
View Lines: <input checked="" type="radio"/> Pending Lines Only			View Steps: <input checked="" type="radio"/> Steps Waiting my Action		
<input type="radio"/> All Lines			<input type="radio"/> All Steps <input type="button" value="Refresh"/>		
View All Lines			View Eligible Steps for Standard Deployment		
	Seq	Object Name	Object Type	<input type="radio"/> 5: QA Test	<input type="radio"/>
<input type="checkbox"/>	1	mainpage.html	File Migration	<input type="checkbox"/> Eligible	
<input type="checkbox"/>	2	Load_Distribution_Data.sql	File Migration	<input type="checkbox"/> Eligible	
<input type="button" value="Check All"/> <input type="button" value="Clear All"/> <input type="button" value="Line Details"/> <input type="button" value="View Log"/>			<input type="button" value="Check All"/> <input type="button" value="Clear All"/> <input type="button" value="Workflow Action"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="First"/> <input type="button" value="Last"/>		

Package Detail Page, Notes Section

The **Notes** section on a package detail page contains fields that you can use to provide package information that you want to store. The **Notes** section is included in the package creation process and continues with package until it is closed.

"Figure 2-7. Package detail page, Notes section" on the next page shows a typical **Notes** section. All **Notes** sections include the **Add Notes** subsection. The **Existing Notes** section is created after the first note is created for the request.

Figure 2-7. Package detail page, Notes section

Notes

Notes to be added on save:

Package Detail Page, References Section

A package's detail page **References** section contains additional information about the package. For example, you might add a URL to a package or delete an outdated document from a package. The **References** section is included in the package creation process and continues with the package until the package is closed. References can be added or deleted from the package.

Use the **Reference Additions** section to add a reference to the package. Saved references are organized by reference type; for example, all saved reference packages are saved in the **Packages** section. For some references, a functional dependency between the package the referenced entity can be created. For more information about references and their functional dependencies, see ["Reference Relationships " on page 35](#).

["Figure 2-8. Package detail page, References section" on the next page](#) shows the **References** section on the Package detail page.

Figure 2-8. Package detail page, References section

References

Reference Additions

New Reference:

References to be added on Save:

Packages in PPM Workbench

You can use the Package Workbench to view existing packages. From a Package window, you can add notes and references to the package, and process the package through its workflow. From the Package window, you can create and submit a package, process it through its workflow, cancel it, or delete it. ["Figure 2-9. Package window" on the next page](#) shows the detail page for a package.

Figure 2-9. Package window

The screenshot shows a software window titled "Package: 30003". It contains two main sections: "Package Information" and "Package Lines".

Package Information Section:

- Package No.:** 30003
- Package Group:** (empty field)
- Created By:** Admin User
- Description:** path test
- Created On:** July 2, 2012
- Workflow:** (REFERENCE) Dev -> Test -> Prod
- Package Status:** New
- Assigned User:** Admin User
- Priority:** Normal
- Parent:** (empty field)
- Assigned Group:** ITG User
- Package Type:** Customization
- Priority Seq:** 50
- Percent Complete:** 0

Package Lines Section:

Package Lines | Status | Notes | References | User Data

Seq	Object Type	App Code	1	2	3
1	File Client->Client	(None)	Client File Name: test	Sub Path: test	File Type: AS
2	File Migration	(None)	File Location: Server	Sub-Path: test	File Name: te
3	RCS Server File	(None)	File Name: server file	RCS Dir: path	RCS Comme

Below the table are buttons: New Line, Edit Line, Copy Line, Remove Line, and up/down arrows. At the bottom are buttons: Submit, OK, Save, and Cancel. The status bar at the very bottom says "Ready".

Package Window, Package Information Section

The **Package Information** section of the Package window displays general information about the package; for example, who created the package, the date, and the associated workflow. The **Package Information** section is included in the package creation process and stays with the package. Typically, when creating a package, you must complete some fields in this section. "Figure 2-10. Package window, Package Information section" on the next page shows a typical general information section. The information in a package's detail page Header section is found in the Package window's general information section.

Figure 2-10. Package window, Package Information section

Package: 30003

Package Information

Package No.: 30003 Package Group: Created By: Admin User

Description: path test Created On: July 2, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: New

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 50

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Seq	Object Type	App Code	1	2	3
1	File Client->Client	(None)	Client File Name: test	Sub Path: test	File Type: AS
2	File Migration	(None)	File Location: Server	Sub-Path: test	File Name: te
3	RCS Server File	(None)	File Name: server file	RCS Dir: path	RCS Comme

New Line Edit Line Copy Line Remove Line

Submit OK Save Cancel

Ready

Package Window, Package Lines Tab

The **Package Lines** tab lists the package lines associated with a package. Package lines define the object migrating from one environment to another environment. Each package line defines one object (file). Typically, objects (files) are defined by their object type (for example, **File Client > Client** or **File Migration**), filename, location, and file type. You cannot define multiple objects on a single package line. "Figure 2-11. Package window, Package Lines tab " on the next page shows the **Package Line** tab with package lines displayed.

Figure 2-11. Package window, Package Lines tab

Package: 30003

Package Information

Package No.: 30003 Package Group: Created By: Admin User

Description: path test Created On: July 2, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: New

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 50

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Seq	Object Type	App Code	1	2	3
1	File Client->Client	(None)	Client File Name: test	Sub Path: test	File Type: AS
2	File Migration	(None)	File Location: Server	Sub-Path: test	File Name: te
3	RCS Server File	(None)	File Name: server file	RCS Dir: path	RCS Comme

New Line Edit Line Copy Line Remove Line

Submit OK Save Cancel

Ready

Package Window, Status Tab

The **Status** tab in the Package window displays the current package status. When a package is first created, the **Status** tab displays the package lines. After the package is saved or submitted, the **Status** tab displays the package lines and all of the workflow steps in the associated workflow.

Use the **Status** tab to view:

- All the possible actions that can be performed on the package
- All the actions performed to date
- Pending actions that must be performed to resolve the package

After a package is submitted, you can use the **Status** tab to process it through the workflow. Each package line includes all of the steps in the workflow. If a workflow step is eligible for action, the **Initial Approval** field for that step displays the value **Eligible** ("Figure 2-12. Package window, Status tab " on the next page).

Figure 2-12. Package window, Status tab

Package: 30006

Package Information

Package No.: 30006 Package Group: Created By: Admin User

Description: CREATED by Test Macro. Created On: July 9, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: In Progress

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 60

Percent Complete: 0

Package Lines Status Notes References User Data

Seq	Object Name	Object Type	1 Design Review	2 Evaluate	3 Migrate to Test	4 QA Test	Migr:
1		File Client->Client	Eligible				
2	test	File Migration	Eligible				
3	e	RCS Server File	Eligible				

Refresh Select All + All - All View --> Line Exec Log (Latest) Action

Submit

Ready

Line Exec Log (Latest)
Package Exec History
Graphical View
Line Permissions
Line Trans History
Decision Detail
Information URL

OK Save Cancel

After a package is submitted, you can expand a package line to display any of the subworkflow steps defined in the workflow. To view the subworkflow steps, above the subworkflow step, click **Expand**.

To expand all subworkflows on the **Status** tab, click **Expand All**. To hide expanded subworkflow steps, above the subworkflow step, click **Collapse**. To hide all subworkflow steps, click **Collapse All**. Clicking **Expand** expands the package line horizontally to display all of the steps within the subworkflow.

The header text for subworkflow steps is displayed in a different color than the header for workflow steps. The step numbering includes additional decimal places to indicate the level of the workflow. For example, if step 3 of a top-level workflow is a subworkflow, its steps are numbered as 3.1, 3.2, 3.3, and so on. Similarly, if the second step in that subworkflow is also a subworkflow step, its steps are numbered as 3.2.1, 3.2.2, 3.2.3, and so on.

From the **Status** tab, you can access several log files, a graphical view of the workflow, transaction histories, and detail files related to the package. Use these files, views, and histories to help you as you process your package.

Accessing Line Execution Log

You can select a package line and get the details of the execution of that particular line by viewing the line execution log. The line viewed is a subset of the overall execution batch log.

If the package line has been configured to migrate to multiple environments using an environment group, the execution log returns an execution summary and link for each destination environment. To view the detailed execution log for an environment, click the associated link.

Accessing Package Execution History

The Package Execution History displays the execution history of each package line. It displays the workflow step name, execution date, and outcome (**Succeeded** or **Failed**) of each execution step.

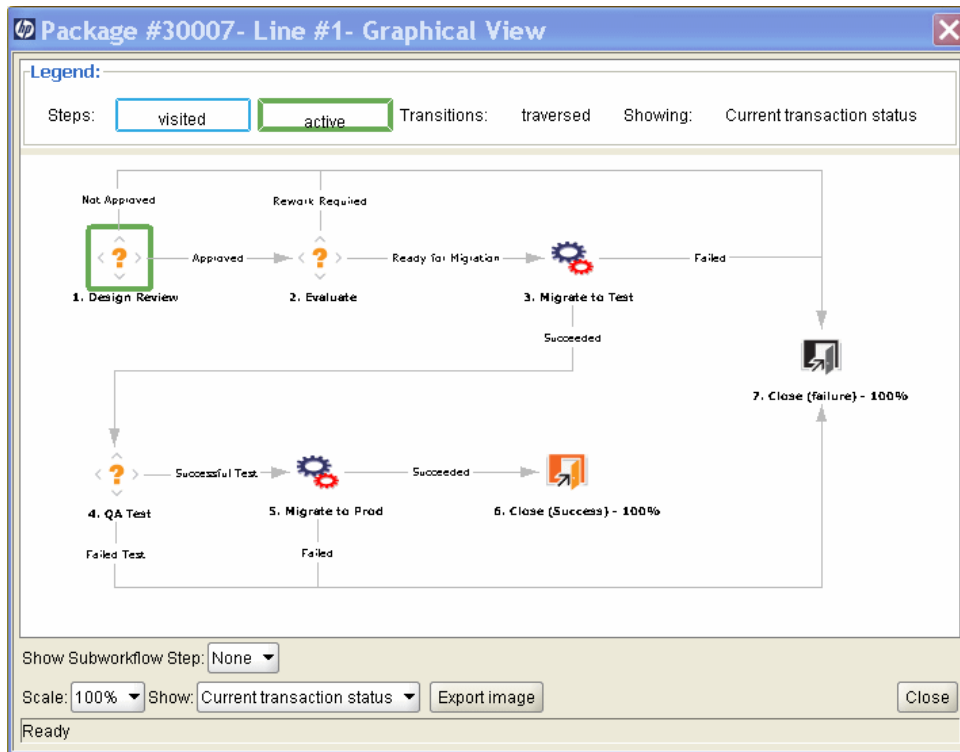
If the package line has been configured to migrate to multiple environments using an environment group, the execution log returns an execution summary and link for each destination environment. Click the link to get the detailed execution logs for each environment.

Graphical View

To view the workflow, select the Graphical View window ("[Figure 2-13. Graphical View window for a package](#)" on the next page). Use the legend at the top of the window to determine which workflow steps have been visited and which steps are active. This image displays all of the workflow steps and subworkflows used in the workflow definition.

To obtain a graphical view of a particular subworkflow, select the subworkflow name from the **Show Subworkflow Step** list at the bottom of the window. This opens a new window that displays the graphical view of that subworkflow.

Figure 2-13. Graphical View window for a package



Viewing Line Permissions

Workflow permissions are established during the initial workflow configuration. The Line Permissions view lists all users in security groups that have been enabled for the related workflow step. If you have questions regarding the permissions set for a particular workflow step, see your application administrator.

Viewing Line Transaction History

You can view the transaction history of each package line. This provides detailed information on how the package line has proceeded through an Deployment Management workflow. Information; for example, as the date of the transaction event, the user linked to the workflow step, the workflow step name and number, status, and results are displayed.

To display information on the subworkflow steps that have been traversed more than once by a single package line, select **Full transaction history**.

Selecting **Current transaction status** displays only information on the most recent transaction up through that step.

Viewing Decision Detail

The Decision Detail displays the decision history of each workflow step. It displays the date, resource, and decision of the decision workflow step.

Viewing Workflow Step Information URL

Workflow steps can be configured to include a URL that provides information regarding the workflow step. If you administrator has linked an informational URL to a workflow step, you can view the URL in the Workflow Step Information URL window.

Package Window, Notes Tab

The **Notes** tab in the Package window ("Figure 2-14. Package window, Notes tab " on the next page) contains fields where notes on and information about the package can be entered and stored. The **Notes** section is included in the package creation process and continues with the package until it is closed. Typically, when creating a package, you do not need to add a note to the package.

Figure 2-14. Package window, Notes tab

Package: 30006

Package Information

Package No.: 30006 Package Group: Created By: Admin User

Description: CREATED by Test Macro. Created On: July 9, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: New

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 60

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Existing Notes

Admin User (admin)
November 1, 2012 09:49:20 AM CST
Admin User (admin)

New Notes

Enlarge

Submit OK Save Cancel

Ready

Package Window, References Tab

A package window's **References** tab ("Figure 2-15. Package window, References tab " on the next page) displays additional information about the package. For example, you might add a URL to a package or delete an outdated document from a package. The **References** tab is included in the package creation process and continues with the package until the package is closed. You can add references to or delete them from the package.

Use the **Reference Addition** section to add a reference to the package. Saved references are organized by reference type; for example, all saved reference packages are saved in the Packages section. For some references, a functional dependency between the package and the referenced entity can be created. For more information about references and their functional dependencies, see "Reference Relationships " on the next page.

Figure 2-15. Package window, References tab

Package: 30006

Package Information

Package No.: 30006 Package Group: Created By: Admin User

Description: CREATED by Test Macro. Created On: July 9, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: New

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 60

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Type	Name	Details	Status	% Complete	Description	Relationship	Relationship
Package	30004		New	0%	CREATED by Te...	Related to this Pa...	Informa
Package	30005		New	0%	CREATED by Te...	Run after this Pac...	Informa

Items in **bold** are actively controlling this Package

New Reference Package (Existing) Add Remove Open Reference

Submit OK Save Cancel

Ready

Reference Relationships

For some references, you can create a functional dependency between the package and the referenced entity. For example, you can specify that a request is a predecessor to the package. This means the package cannot continue until the request is closed.

- Predecessor Relationships.** Predecessor relationships dictate that action is not allowed on one entity until the referenced entity closes. For example, a package cannot complete any workflow action until the referenced task is closed (**Completed**, **Bypassed**, or **Cancelled**). The package status is **Pending Task**. After the task closes, the package can be acted upon after more. This does not stop other request fields from being edited.
- Successor Relationships.** Successor relationships dictate that action is not allowed on the referenced entity until the entity closes. For example, a referenced task cannot change status until the original package is closed. The task status is **Pending Request**. When the package closes, the task can again be changed. This does not prevent other task fields from being edited.

Table 2-1 lists the references, their definitions, and possible dependency relationships.

Table 2-1. References and relationships

Reference	Reference Description	Possible Relationships	Relationship Description
Attachment	Attach a file from a local machine to the current package. The attached file is copied to the server.	Standard attachment interaction	(Informational) The attachment is related to this package.
Packages (Existing)	Reference an existing package.	Duplicate package	(Informational) The referenced package is a duplicate of the package.
		Run before this package in a release	(Informational) In a release, the selected package must be run before this package.
		Run after this package in a release	(Informational) In a release, the selected package must be run after this package.
		Predecessor	(Blocking) Action is not allowed on the package until the referenced package closes.
		Successor	(Blocking) Action is not allowed on the referenced package until the package closes.
Packages (New)	<p>New packages can also be created from a package.</p> <p>If configured as part of the workflow, you can spawn a package from a workflow step. When this happens, a reference to that package is automatically generated, establishing a two-way</p>	Run before this package in a release	(Informational) In a release, the selected package must be run before this package.

Table 2-1. References and relationships, continued

Reference	Reference Description	Possible Relationships	Relationship Description
	link between the packages.		
		Run after this package in a release	(Informational) In a release, the selected package must be run after this package.
		Predecessor	(Blocking) Action is not allowed on the package until the referenced package closes.
		Successor	(Blocking) Action is not allowed on the referenced package until the package closes.
Programs	Reference a program in Program Management.	Related to This program	(Informational) Selected program is related to this package.
Projects	Reference a project in Project Management.	Related to This package	(Informational) Selected project is related to this package.
Releases	Reference a release in Deployment Management.	Contains this package	(Informational) The package is contained in the selected release.
Request (Existing)	Reference an existing request.	Parent of this package	(Informational) The referenced request is the parent of the package.
		Related to this package	(Informational) Referenced request is related to this package.

Table 2-1. References and relationships, continued

Reference	Reference Description	Possible Relationships	Relationship Description
		Predecessor	(Blocking) Action not allowed on this package until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this package closes.
Requests (New)	<p>New packages can be created from existing packages.</p> <p>Also, if configured as part of the workflow, you can spawn a package from a package. When this happens, a reference to that package is automatically generated, establishing a two-way link between the packages.</p>	Parent of this package	(Informational) The referenced request is the parent of the package.
		Related to this package	(Informational) Referenced request is related to this package.
		Predecessor	(Blocking) Action not allowed on this package until the referenced request closes.
		Successor	(Blocking) Action not allowed on the referenced request until this package closes.
Tasks	Reference a task in Project Management.	Related to this package	(Informational) The referenced task is related to this package.
URL	Reference a Web address. Documents at the URL must be in MIME format.	Standard URL interaction	(Informational) The URL is related to this package.

Predecessor Relationships

Predecessor relationships dictate that action cannot be performed on one entity until the referenced entity closes. For example, a package cannot complete any workflow action until the referenced task is closed (**Completed**, **Bypassed**, or **Cancelled**). The package status is **Pending Task**. After the referenced task closes, the package can be acted on again. This does not prevent the editing of other request fields.

Successor Relationships

Successor relationships dictate that action is not allowed on a referenced entity until the entity closes. For example, a referenced task cannot change its status until the original package is closed. The task status is **Pending Request**. After the package closes, the task can be acted on. This does not stop other task fields from being edited.

Chapter 3: Creating Packages

- ["Overview of Creating Packages" below](#)
- ["Creating Packages" on page 46](#)
- ["Entering General Information for Packages " on page 53](#)
- ["Adding Lines to Packages " on page 53](#)
- ["Adding Notes to Packages " on page 56](#)
- ["Adding References to Packages from Package Workbench" on page 57](#)
- ["Submitting Packages " on page 71](#)

Overview of Creating Packages

This section provides instructions on how to create and submit packages to deploy software and application changes. Although you typically use the PPM Workbench to create packages, you can also create them by copying an existing package, or create them as referenced entities.

After you create a package, you must submit it to start the workflow (business process). For information on how to submit a package, see ["Submitting Packages " on page 71](#).

Before You Create Packages

Before you create a package, make sure you understand the following:

- **Workflow.** Defined in the Workflow Workbench.
- **Environments.** Specified in the workflow step and defined in the Environment Workbench.
- **Object type.** Defined in the Object Type Workbench.

Selecting Workflows

Each package is processed through a predefined workflow. You must select a workflow to apply to each package you create. It is important that you route your packages through workflows that

accurately model the appropriate business process.

To view the graphical layout of an Deployment Management workflow:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Configuration > Workflows**.

The Workflow Workbench window opens.

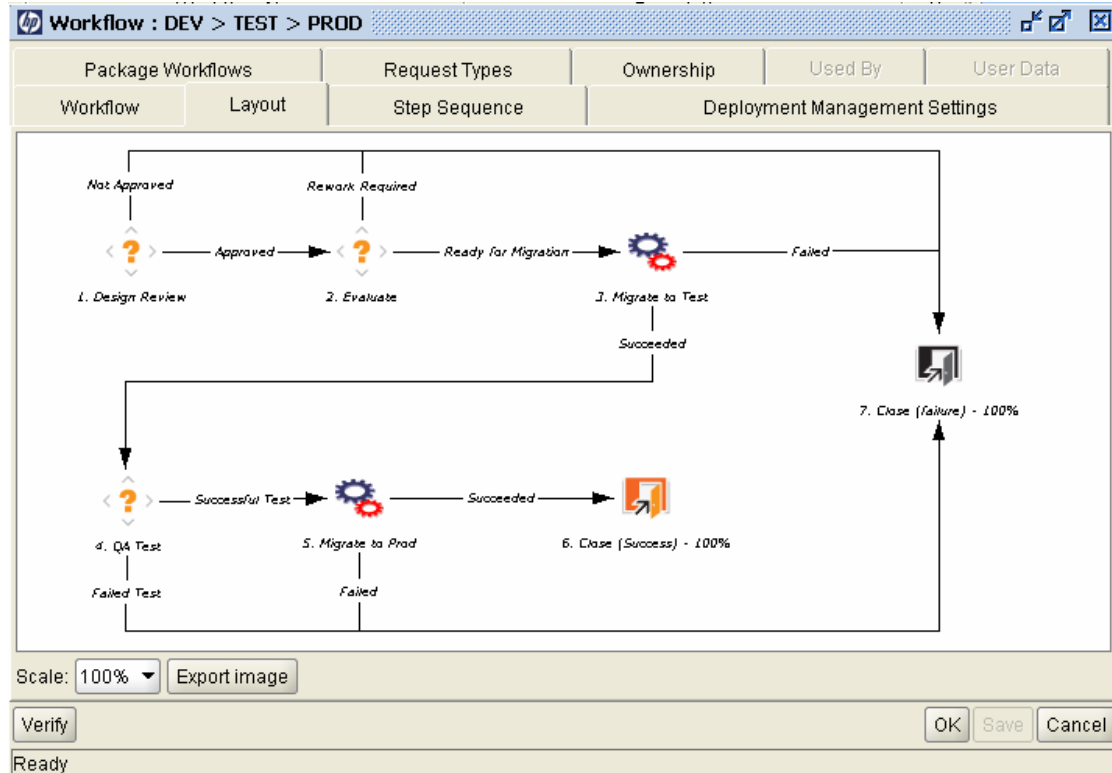
4. To display all of the workflows, in the Workflow Workbench, click **List**.

Note: To restrict your search, you would specify one or more of the query parameters.

The **Results** tab lists all workflow records.

5. Select a workflow for which the **Workflow Scope** column displays **Packages**, and then click **Open**.

The Workflow <Workflow Name> window opens to the **Layout** tab, which displays a graphical representation of the workflow steps.



Check to ensure that the workflow follows the correct business process for your package. If it does not, open a different workflow.

6. Double-click a migration workflow step. For example, Migrate to Test or Migrate to Prod.

The Workflow Step window for that step opens to the **Properties** tab.

7. Verify that the source and destination environments listed on the tab are correct.

The screenshot shows the 'Workflow Step' window with the 'Properties' tab selected. The window has a title bar with the HP logo and a close button. The tabs at the top are: Properties, Security, Segregation of Duties, Notifications, Timeout, User Data, Results, and Display Settings... The main content area contains the following fields and controls:

- Step Number: 4
- Step Name: Provide More Info
- Action Summary: (empty text box)
- Description: (empty text box)
- Source Type: Decision
- Source Name: DEM - Need Info from Requestor
- Enabled: ☒ Yes ☐ No
- Display: Always (dropdown menu)
- Workflow Parameter: NONE (dropdown menu)
- Avg Lead Time: (empty text box)
- Request Status: Pending Requestor Info (dropdown menu with a list icon)
- Current % Complete: (empty text box)
- Parent Assigned To User: (empty text box) with Edit and Clear buttons
- Parent Assigned To Group: (empty text box) with Edit and Clear buttons
- Workflow Step Information: (empty text box) with a 'U' icon
- Authentication Required: None (dropdown menu)

At the bottom right are the OK, Apply, and Cancel buttons. At the bottom left is a status bar that says 'Ready'.

8. To view additional information in the Workflow Step window, click the following tabs:
 - **Security.** Use to define the security groups allowed to act on the selected step. All enabled security groups are displayed in either the **Available Security Groups** field or the **Linked Security Groups** field. Each user who belongs to a linked security group can perform the actions defined for that particular workflow step.

- **Segregation of Duties.** Use to specify workflow steps to be segregated from the selected step in the workflow. This segregation prevents a given user from acting on both steps in the workflow. For example, you might use it to prevent the person who requests a change from then deploying that change to the production system without approval from a third party.

You can also use this tab to specify that the package creator cannot act on the selected workflow step.

- **Notifications.** Use to attach email notifications to the workflow step. Email messages can be sent whenever a particular event (for example, the step completes with a specific result) occurs at the step.
- **Timeout.** This tab displays timeout intervals set for this workflow step.
- **User Data.** This tab displays any custom fields for each workflow step.
- **Results.** This tab lists all of the possible valid results for the step.

9. Close the Workflow Step window.

Verifying Environments

Some workflow steps include specify source and destination environments. If you are not sure the specified environments are correct, you can open them in the Environment Workbench.

To access an environment:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench.**

The PPM Workbench opens.

3. From the shortcut bar, select **Environments > Environments.**

The Environment Workbench opens.

4. To display all of the environments, click **List.**

To restrict the search, specify one or more query parameters.

The **Results** tab lists the environment records.

5. Select one or more of the listed environments, and then click **Open.**

The Environment <Environment Name> window opens.

6. Check the settings for the server, client, and database.
7. Close the Environment window.

Verifying Object Types

When creating a package, the available object types are displayed in an auto-complete list. To view the available object types before you start to create a package, you can open an object type in the Object Type Workbench. "Table 3-1. Object types" below lists the HPE-supplied object types.

Note: The Deployment Management Extensions provide additional object types.

Table 3-1. Object types

Object Type	Description
File Client>Client	File copy from client to client.
File Migration	File copy from environment to environment.
PPM Data Source Migrator	Migrates a PPM Center data source migrator.
PPM Module Migrator	Migrates a PPM Center module from one PPM Center environment to another PPM Center environment.
PPM Object Type Migrator	Migrates a PPM Center object type from one PPM Center environment to another PPM Center environment.
PPM Overview Page Section Migrator	Migrates a PPM Center overview page section from one PPM Center environment to another PPM Center environment.
PPM Portlet Definition Migrator	Migrates a PPM Center portlet definition from one PPM Center environment to another PPM Center environment.
PPM Project Template Migrator	Migrates a PPM Center project template from one PPM Center environment to another PPM Center environment.
PPM Report Type Migrator	Migrates a PPM Center report type from one PPM Center environment to another PPM Center environment.
PPM Request Header Type Migrator	Migrates a PPM Center request header type from one PPM Center environment to another PPM Center environment.
PPM Request Type Migrator	Migrates a PPM Center request type from one PPM Center environment to another PPM Center environment.

Table 3-1. Object types, continued

Object Type	Description
PPM Special Command Migrator	Migrates a PPM Center special command from one PPM Center environment to another PPM Center environment.
PPM User Data Context Migrator	Migrates a PPM Center user data context from one PPM Center environment to another PPM Center environment.
PPM Validation Migrator	Migrates a PPM Center validation from one PPM Center environment to another PPM Center environment.
PPM Workflow Migrator	Migrates a PPM Center workflow from one PPM Center environment to another PPM Center environment.
OS/390 JCL Migration	Migrates an OS/390 JCL from a source environment to the destination environment.
PVCS File Migration	Migrates an object from the PVCS archive to the destination environment.
RCS File Migration	This object manages the check out and distribution of code in RCS.
RCS Server File	Old file will be checked in on the destination environment. New file will be checked in and checked out Read-Only on the destination environment.
SourceSafe File Migration	Manages the check out and promotion of files from the SourceSafe version control archive.

Opening an Object Type

To open an object type:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Object Types**.

The Object Type Workbench window opens to the **Query** tab.

4. To display all object types, click **List**.

To restrict the search, specify one or more query parameters.

5. Select one or more of the listed object types, and then click **Open**.

The Object Type <Object Type Name> window opens.

6. Click the **Commands** tab.
7. Check the commands that the object type calls.
8. Close the Object Type *<Object Type Name>* window.

Creating Packages

Although you typically use the PPM Workbench to create packages, you can also create one by copying an existing package, or by creating a new package as a referenced entity. This section provides information about how to use all three methods.

Creating Packages Using PPM Workbench

Packages are used to deploy software and application changes. This section covers how to define the contents of a package, including adding package lines and specifying the appropriate deployment workflow. For each instance of a software migration submission, a new package needs to be created.

To create a package from the PPM Workbench:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**.
The Package Workbench opens.
4. Click **New Package**.

The Package window opens.

The screenshot shows the 'Package: 30003' window. The 'Package Information' tab is active, displaying fields for Package No. (30003), Package Group, Description (path test), Workflow ((REFERENCE) Dev -> Test -> Prod), Assigned User (Admin User), Assigned Group (ITG User), Package Type (Customization), Created By (Admin User), Created On (July 2, 2012), Package Status (New), Parent, and Priority Seq (50). The 'Package Lines' tab is also visible, showing a table with 3 columns: Seq, Object Type, App Code, and 1, 2, 3. The table contains 3 rows of data.

Seq	Object Type	App Code	1	2	3
1	File Client->Client	(None)	Client File Name: test	Sub Path: test	File Type: AS
2	File Migration	(None)	File Location: Server	Sub-Path: test	File Name: te
3	RCS Server File	(None)	File Name: server file	RCS Dir: path	RCS Comme

Below the table are buttons for 'New Line', 'Edit Line', 'Copy Line', 'Remove Line', and a scroll bar. At the bottom are 'Submit', 'OK', 'Save', and 'Cancel' buttons.

5. In the **Package Information** section, complete the fields.

For information on how to complete the fields in section, see ["Entering General Information for Packages " on page 53.](#)

6. On the **Package Lines** tab, add the package lines to the package.

Package lines capture information specifically related to each object that you are migrating from one environment to another environment. For information on how to add package lines, see ["Adding Lines to Packages " on page 53.](#)

7. On the **Notes** tab, add any notes to the package.

For information on how to add notes, see ["Adding Notes to Packages " on page 56.](#)

8. On the **References** tab, you can add references to the package.

For information on how to add references, see ["Adding References to Packages from Package Workbench" on page 57.](#)

9. To save the package and close the Package window, click **OK**. To save the package and leave the Package window open, click **Save**.

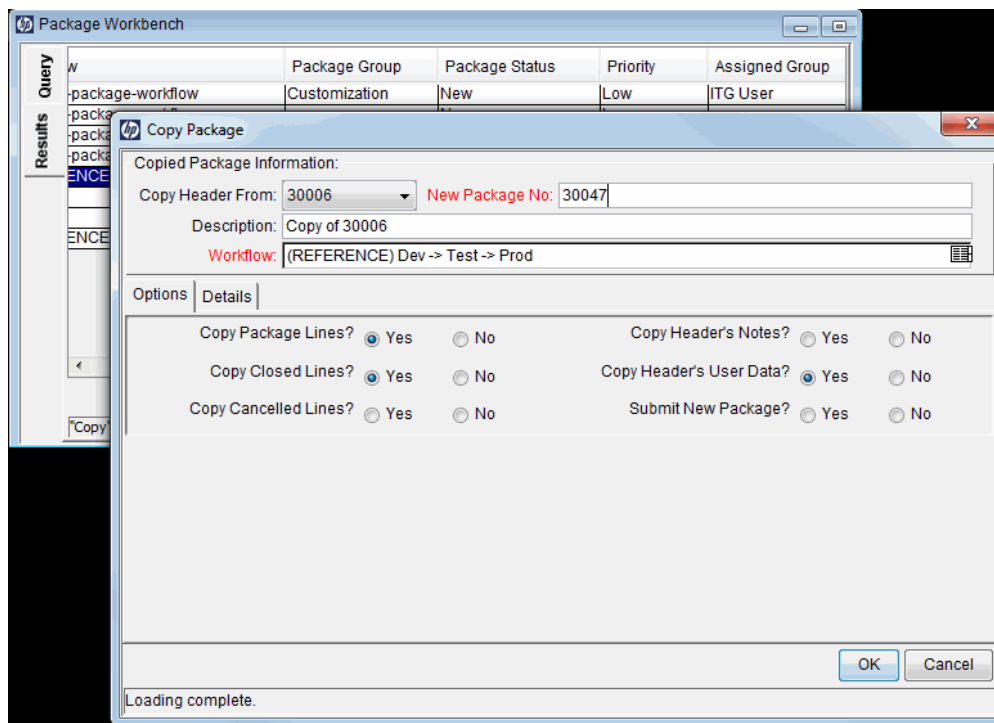
Creating Packages by Copying Existing Packages

You can create a package by copying an existing package (either new or saved). You can specify which sections of the existing package you want to include in the new package.

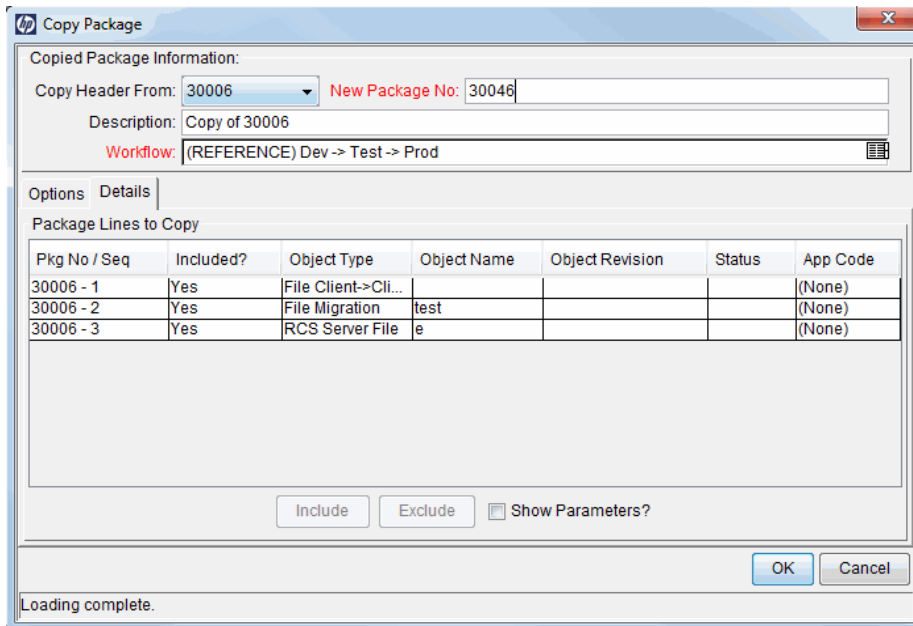
To create a package from an existing package:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**. The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**. The Package Workbench opens.
4. On the **Query** tab, click **List**. The Package Workbench **Results** tab lists all existing packages.
5. On the **Results** tab, select a package, and then click **Copy**.

The Copy Package window opens to the **Options** tab. ["Table 3-2. Copy package options" on the next page](#) lists the options available on the tab.



6. Select the sections to include in the new package, and then click the **Details** tab.



Copied Package Information:

Copy Header From: 30006 New Package No: 30046

Description: Copy of 30006

Workflow: (REFERENCE) Dev -> Test -> Prod

Options Details

Package Lines to Copy

Pkg No / Seq	Included?	Object Type	Object Name	Object Revision	Status	App Code
30006 - 1	Yes	File Client->Cli...				(None)
30006 - 2	Yes	File Migration	test			(None)
30006 - 3	Yes	RCS Server File	e			(None)

Include Exclude ☐ Show Parameters?

OK Cancel

Loading complete.

The **Details** tab lists all of the package lines that were copied from the original package. By default, all of these lines are included in the new package.

7. Exclude a listed package line from the new package.
 - a. In the **Package Lines to Copy** table, select the line.
 - b. At the bottom of the tab, click **Exclude**.

The Package window opens and displays the information you selected from the copied package.

8. View the parameters that describe a listed package line.
 - a. In the **Package Lines to Copy** table, select the line.
 - b. At the bottom of the tab, select the **Show Parameters** checkbox.

Additional columns in the **Package Lines to Copy** table display the package line parameters.

- c. To view all of the parameters, use the horizontal scroll bar.
9. Click **OK**.

Table 3-2. Copy package options

Option	Description
Copy Package Lines	Copies all of the package lines (with a status other than Closed or Cancel) in the existing package into the new package. The default is Yes .

Table 3-2. Copy package options, continued

Option	Description
Copy Closed Lines	Copies all of the closed package lines in the existing package into the new package. The default is Yes .
Copy Cancelled Lines	Copies all of the cancelled package lines in the existing package into the new package. The default is No .
Copy Header's Notes	Copies all of the notes attached to the existing package to the new package. Defaults to No .
Copy Header's User Data	If applicable, copy the user data from the existing package to the new package.
Submit New Package	After the package is copied, submit the package. The default is No . If you select No , your package is not submitted. To submit the package, you must open the copied package and click Submit .

Creating Packages as References from Packages

You can create a new package as part of referencing a new package to an entity such as a request or another package.

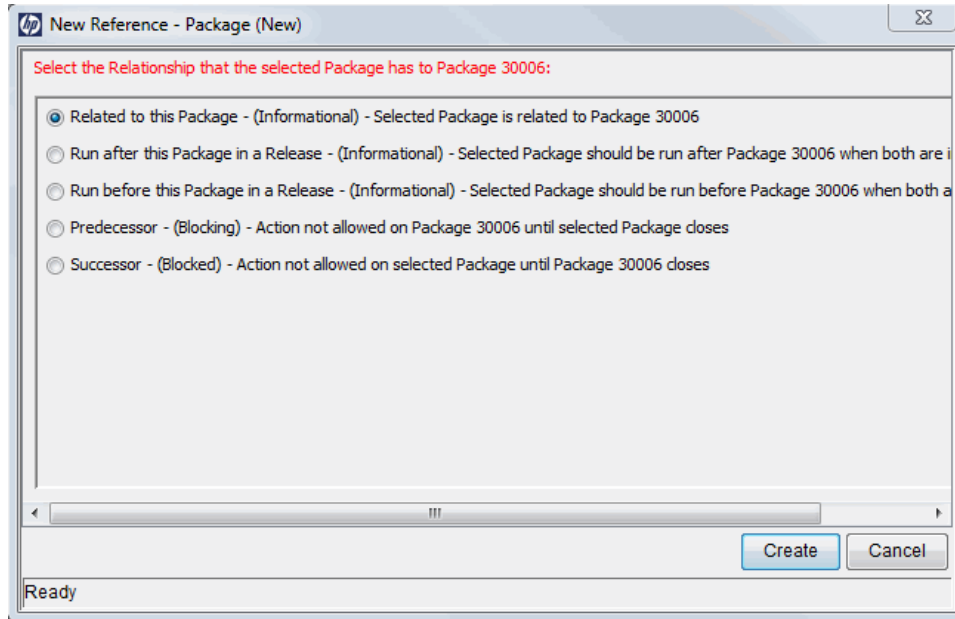
To create a new package as a reference to an existing package:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**.
The Package Workbench opens to the **Query** tab.
4. Use the available fields to provide your search criteria, and then click **List**.
The **Results** tab lists the packages that match your search criteria.
5. Double-click the row for the package you want to open.

The Package window opens.

6. Click the **References** tab.
7. From the **New Reference** list at the bottom on the tab, select **Package (New)**, and then click **Add**.

The New Reference - Package (New) window opens.



8. Under **Select the Relationship that the selected Package has to Package # <Package Number>**, select the option that describes the relationship that the new package is to have to the existing package, and then click **Create**.

A new Package window opens.

For descriptions of the possible relationships between referenced entities, see ["Table 2-1. References and relationships" on page 36](#).

9. Provide all required information, and any optional information you want to associate with the new package, and then click **OK** or **Save**.
10. In the Package window that displays the original package, click **OK**.

Creating Packages as References from Requests

You can create a package as a reference from a request. When creating a package from a request, you do not open the PPM Workbench, even if you have the correct permissions. Instead, you work in the standard interface using the Create New Package and New Package pages. When you create a package as a reference from a request, you cannot add package lines, which means you cannot complete and submit the package. Adding package lines to a package and submitting a package requires using the Package Workbench.

To create a package as a reference from a request:


1. Log on to PPM Center.
2. From the menu bar, select **Open > Demand Management > Search Requests**.
3. Locate, and then open a request.

You can open an existing request or create a new request from the menu bar. For information about how to open an existing request or create a request, see the *Demand Management User's Guide*.

The detail page for the request opens.

4. In the request's detail page, scroll to the **References** section.
5. From the **New Reference** list, select **Package (New)**, and then click **Add**.

The Create New Package page opens.

 PROJECT AND PORTFOLIO MANAGEMENT CENTER

Create New Package

***Relationship:**

- ☐ Child of this Request - (Informational) - The selected Package is the child of Request 30155
- ☒ Related to this Request - (Informational) - The selected Package is related to Request 30155
- ☐ Predecessor - (Blocking) - Action not allowed on Request 30155 until selected Package closes
- ☐ Successor - (Blocked) - Action not allowed on selected Package until Request 30155 closes

Create

Cancel

6. Select the relationship, and then click **Create**.

The New Package page opens.

7. Select the workflow from the list.

8. Type any optional information that you want to keep as part of the record in the **Notes** tab, and then click **Save**.
9. On the detail page for the request, click **Save**.

Entering General Information for Packages

To complete the general information section for packages:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**.
The Package Workbench opens.
4. From the **Query** tab, click **New Package**.
The Package window opens. You use the Package window to define the package contents. The package number is assigned automatically.
5. Complete the required fields.
6. Select the workflow from the auto-complete list.
7. In the Package window, click **OK** or **Save**.
The package line is added to the package.

Adding Lines to Packages

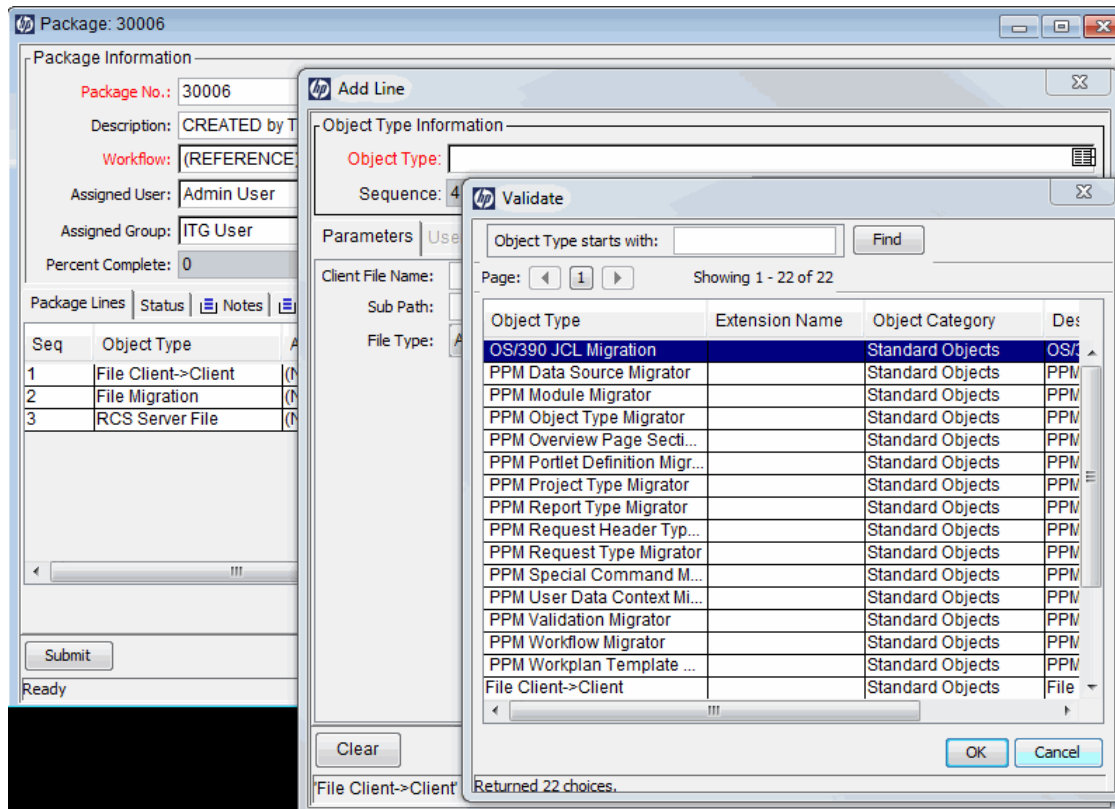
Package lines define the object migrating from one environment to another environment. Each package line defines just one object (often a file). Typically, objects are defined by their object type (for example, **File Client > Client** or **File Migration**), name, location, and, in the case of files, file type.

To add a line to package:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**. The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**. The Package Workbench opens.
4. Open or create a new package. The Package window opens.
5. Click **New Line**. The Add Line window opens.
6. In the **Object Type** field, select the object type for the object (file) you plan to migrate using the auto-complete icon.

Selecting an object type dynamically updates the fields in the Add Line window.



7. In the Add Line window, complete the associated fields, and then click **OK**.

In some cases, you can add multiple package lines from a single Add Line window. You can do this when you have multiple objects (files) to migrate that are in the same location.

To add multiple lines from a single Add Line window, the following must be true:

- Package lines all follow the same workflow and use the same object type.
- The object type parameters include at least one auto-complete list field with an enabled **Multi** button.

By selecting multiple files, you add multiple package lines to the package. Remember, you cannot define multiple objects on a single package line.

The screenshot shows the 'Add Line' dialog box. The 'Object Type Information' section has 'Object Type' set to 'RCS File Migration', 'Sequence' set to '4', and 'Application Code' set to 'None'. The 'Parameters' section has 'File Location' set to 'Server', 'Sub Paths' is empty, 'File Name' is empty, 'Version Label' is set to '[PKG.NUMBER]', and 'File Types' is set to 'ASCII'. The 'User Data' section is empty. At the bottom, there are 'Clear', 'OK', 'Add', and 'Cancel' buttons. A status bar at the bottom indicates 'RCS File Migration parameters loaded.'

The contents of the Add Line window are included in the Packages window as a package line. The Add Line window closes. In the Add Line window, clicking **Add** includes the package line in the Package window and the Add Line window remains open.

The screenshot shows a window titled "Package: 30003". It contains a "Package Information" section with fields for Package No. (30003), Package Group, Description (path test), Workflow ((REFERENCE) Dev -> Test -> Prod), Assigned User (Admin User), Assigned Group (ITG User), Package Type (Customization), Created By (Admin User), Created On (July 2, 2012), Package Status (New), Parent, and Priority Seq (50). Below this is a tabbed interface with "Package Lines", "Status", "Notes", "References", and "User Data". The "Package Lines" tab is active, showing a table with 3 columns: Seq, Object Type, and App Code. The table has 3 rows of data. Below the table are buttons for "New Line", "Edit Line", "Copy Line", and "Remove Line", along with up and down arrow icons. At the bottom are "Submit", "OK", "Save", and "Cancel" buttons. The status bar at the very bottom says "Ready".

Seq	Object Type	App Code	1	2	3
1	File Client->Client	(None)	Client File Name: test	Sub Path: test	File Type: AS
2	File Migration	(None)	File Location: Server	Sub-Path: test	File Name: te
3	RCS Server File	(None)	File Name: server file	RCS Dir: path	RCS Comm

8. In the Package window, click **OK** or **Save**.

The package line is added to the package. To start the package on its associated workflow, click **Submit**. Submitting the package to the workflow generates entries under the **Status** tab for each of the workflow steps defined for the workflow. As each step in the workflow is ready to be processed, the step shows an Eligible status. You can view the progress of each package line by clicking the **Status** tab. For information about how to submit a package, see ["Submitting Packages" on page 71](#).

Adding Notes to Packages

In the Package window, the **Notes** tab ("Figure 3-1. Package window, Notes section" on the next page) displays additional package information. Notes are attached to the package, and not to individual package lines. If you have a note that is specific to a package line, you must include the package line reference as part of the note text.

Figure 3-1. Package window, Notes section

Package: 30006

Package Information

Package No.: 30006 Package Group: Created By: Admin User

Description: CREATED by Test Macro. Created On: July 9, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: New

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 60

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Existing Notes

Admin User (admin)
November 1, 2012 09:49:20 AM CST
Admin User (admin)

New Notes

Enlarge

Submit OK Save Cancel

Ready

You can add notes to existing packages, packages you are creating, and to submitted packages that have not been closed. You cannot add a note to a closed package.

To add a note, open a package and click the **Notes** tab. In the **New Notes** field, type the text of the note, and then click **Save**. The note is added to the **Existing Notes** field.

Adding References to Packages from Package Workbench

You can use the **References** section of the package detail page to add references of several types to a package. For example, you might want to add a document or URL to a package. You can add the following types of references to a package:

- Attachments
- Packages (new and existing)
- Projects
- Releases

- Requests (new and existing)
- Tasks
- URLs

For some references (such as requests and other packages), you can create a functional dependency to the original package. For example, you can specify that a request is a predecessor to the package. This means the package cannot continue until the request is closed. For a list of the references and their possible dependency relationships, see ["Reference Relationships " on page 35](#).

This section provides details on how to use the Package Workbench to add the different entity types as package references. For information on how to add package references from the standard interface, see ["Adding References to Packages from Standard Interface" on page 78](#).

Adding Attachments as Package References

This section provides the steps you use to add an attachment as a package reference.

To add an attachment as a package reference:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. Open a package.
5. In the Package window, click the **References** tab.

The screenshot shows the 'Package: 30006' window. The 'Package Information' section includes fields for Package No. (30006), Package Group, Description (CREATED by Test Macro.), Workflow ((REFERENCE) Dev -> Test -> Prod), Assigned User (Admin User), Assigned Group (ITG User), Package Type (Customization), Created By (Admin User), Created On (July 9, 2012), Package Status (New), Parent, and Priority Seq (60). Below this is a table of Package Lines.

Type	Name	Details	Status	% Complete	Description	Relationship	Relation
Package	30004		New	0%	CREATED by Te...	Related to this Pa...	Informa
Package	30005		New	0%	CREATED by Te...	Run after this Pac...	Informa

Below the table, there is a section for 'Items in bold are actively controlling this Package' and a 'New Reference' section with a dropdown menu set to 'Package (Existing)', an 'Add' button, and a 'Remove' button. At the bottom, there are 'Submit', 'OK', 'Save', and 'Cancel' buttons.

- From the **New Reference** list, select **Attachment.**, and then click **Add**.

The Add Document window opens.

The screenshot shows the 'Add Document' window. It has a 'File:' label and a text input field with a 'Browse' button next to it. Below this is an 'Author:' label with a text input field containing 'Admin User'. There is also a 'Description:' label with a large text input field. At the bottom, there are 'Add' and 'Cancel' buttons.

- Attach the file, complete the fields, and then click **Add**.

The **References** tab lists the attachment.

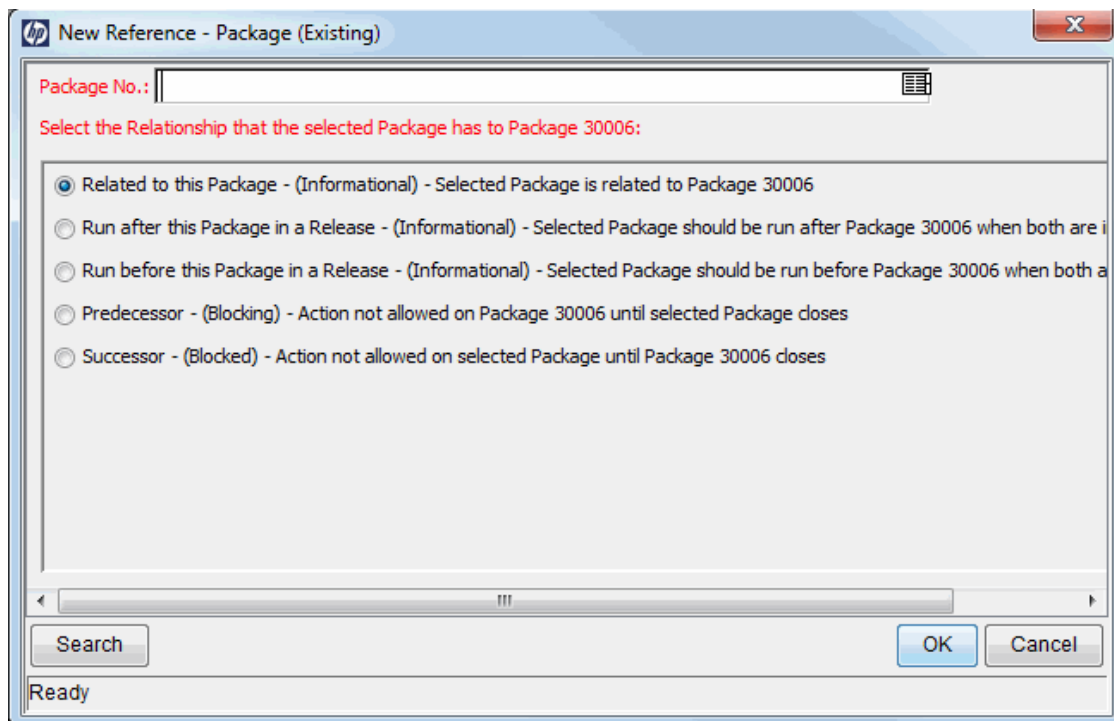
8. Click **OK** or **Save**.

Adding Existing Packages as Package References

To add an existing package as a reference to a package:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**.
The Package Workbench opens.
4. Open a package.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **Package (Existing)**, and then click **Add**.

The New Reference - Package (Existing) window opens.



7. Under **Select the Relationship that the selected Package has to Package <Package Number>**, select the option that describes the relationship that the packages have to the open package.

8. Select the existing packages from the **Package No.** auto-complete list.

The **Package No** field displays the number of the package you selected.

9. Under **Select the Relationship that the selected Package has to Package <Package Number>**, select the option that describes the relationship that the packages have to the open package, and then click **OK**.

The **References** tab lists the selected packages.

10. Click **OK** or **Save**.

Adding New Packages as Package References

You can reference a new package to a package.

To create a package to add as a package reference:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

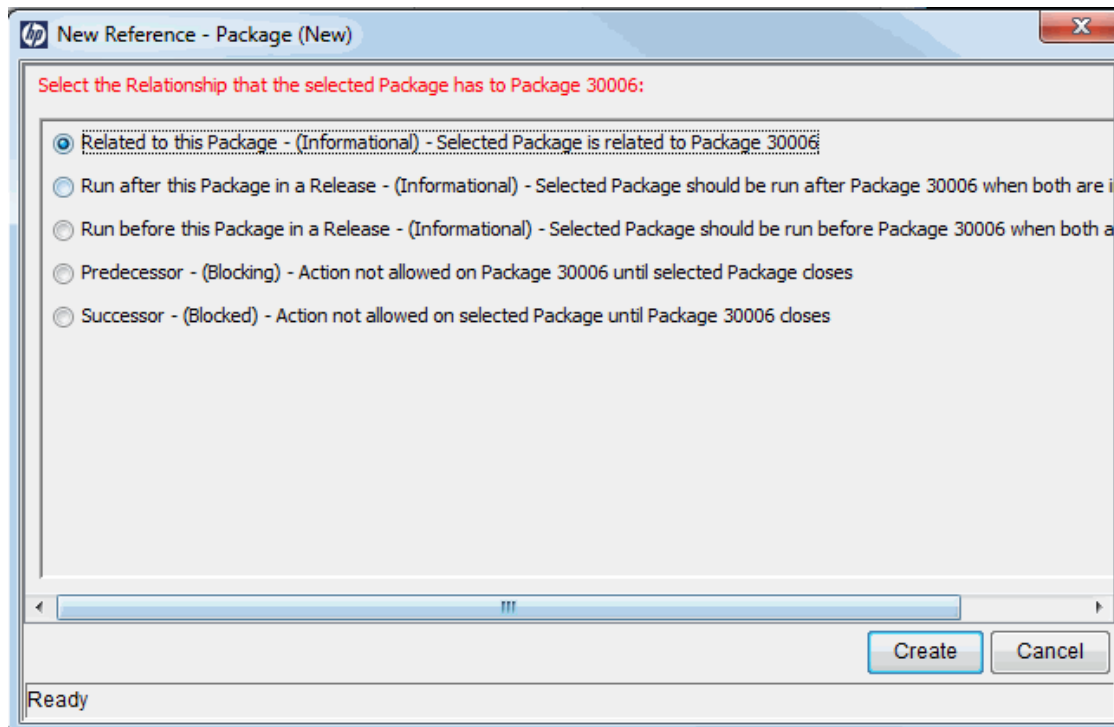
The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. Open the package to which you want to add a reference.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **Package (New)**, and then click **Add**.

The New Reference - Package (New) window opens.



7. Under **Select the Relationship that the selected Package has to Package <Package Number>**, select the option that describes the relationship that the new package is to have to the package you opened, and then click **Create**.

A new Package window opens.

8. In the **Workflow** field, type the name of a workflow to apply to the new package.
9. Type any other information you want to record in the **Notes** tab, modify any values that you want to change, and then click **Save** or **OK**.

The **References** tab lists the new package reference.

10. Click **Save** to save the package.

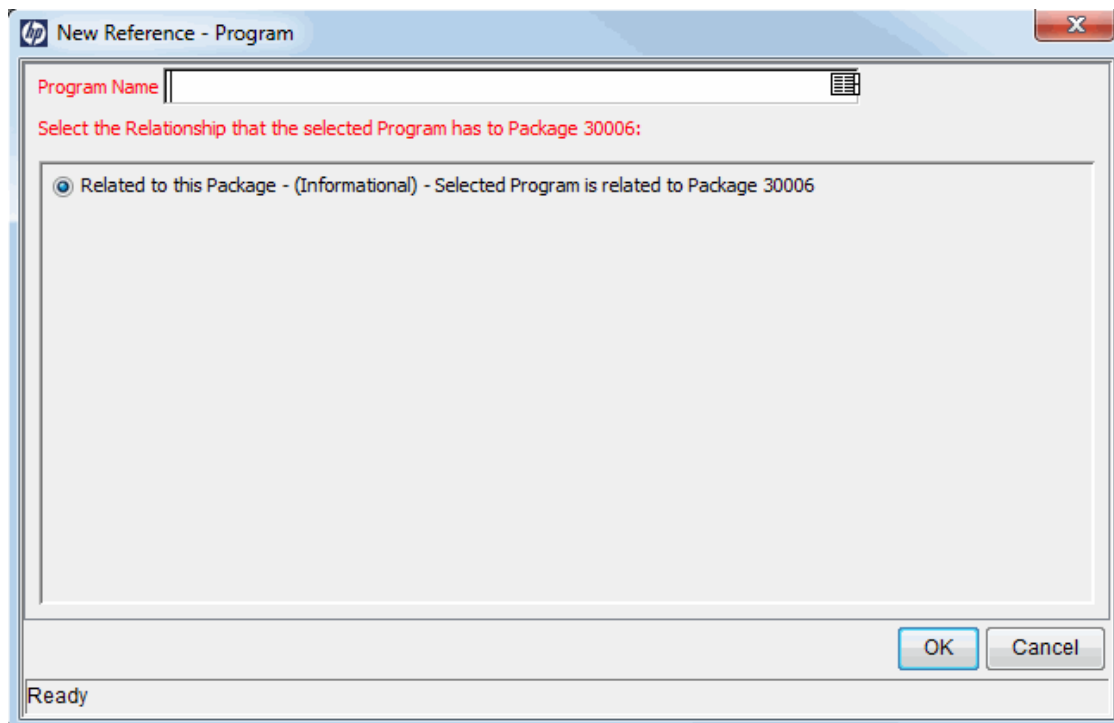
Attaching Programs as Package References

You can reference existing programs to a package.

To reference an existing program:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**.
The Package Workbench opens.
4. Open the package to which you want to add a reference.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **Program**, and then click **Add**.

The New Reference - Program window opens.



7. In the **Program Name** field, select the program from the auto-complete list.
The **Program Name** field displays the program you selected.
8. Under **Select the Relationship that the selected Program has to Package <Package Number>**, select the option that describes how the program is related to the package, and then click **OK**.

The **References** tab displays the program name.

9. Click **Save** to save the package.

Attaching Projects as Package References

To attach a project as a package reference:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

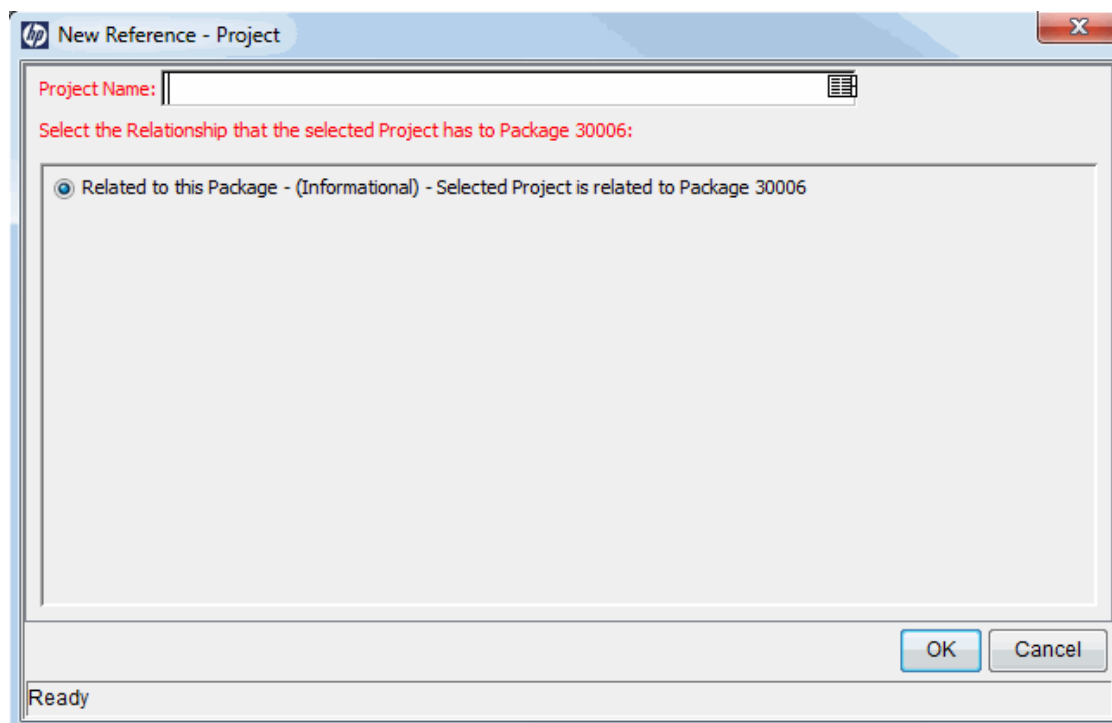
The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. Open the package to which you want to add a reference.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **Project**, and then click **Add**.

The New Reference - Project window opens.



7. In the **Project Name** field, select a project name from the auto-complete list.
8. Under **Select the Relationship that the selected Project has to Package <Package Number>**, select the option that describes how the project is related to the package, and then click **OK**.

The **References** tab lists the selected project.

9. Click **Save** to save the package.

Adding Releases as References

You can reference existing releases to requests.

To reference a release:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

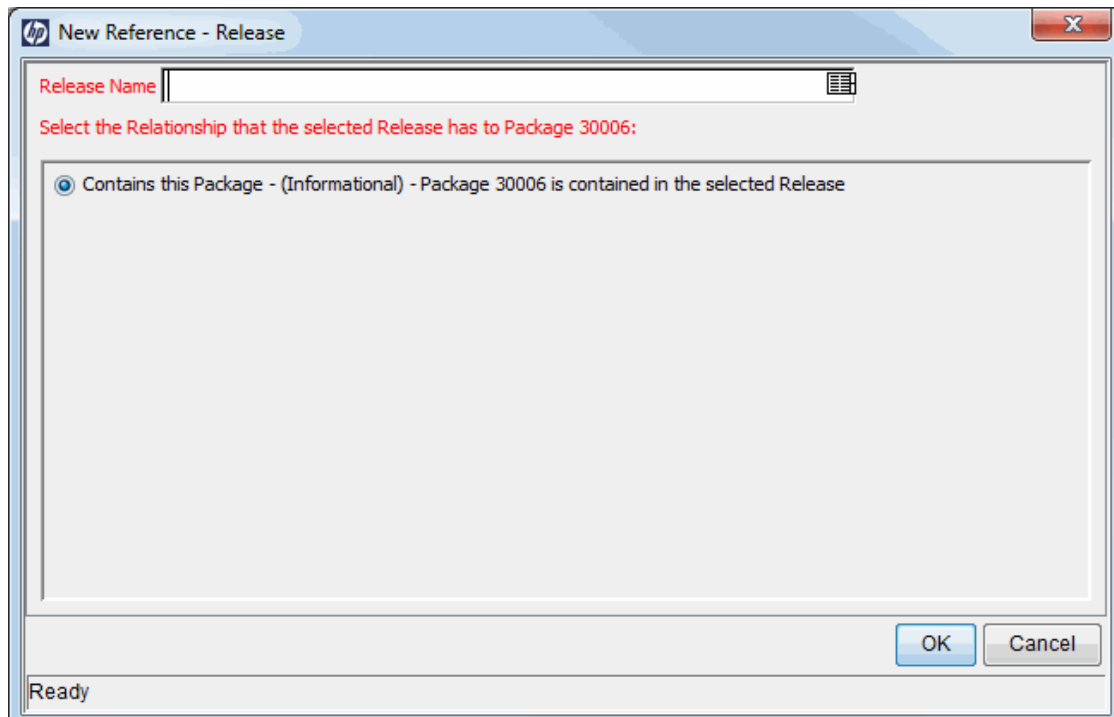
The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. Open the package to which you want to add a reference.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **Release**, and then click **Add**.

In the **Status** section, the New Reference - Release window opens.



7. To specify a release name in the **Release Name** field, use the auto-complete list.
8. Under **Select the Relationship that the selected Release has to Package <Package Number>**, select the option that describes how the release is related to the package, and then click **OK**.

The **References** tab lists the release.

9. Click **Save** to save the package.

Adding Existing Requests as Package References

You can reference existing requests to requests.

To reference an existing request:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

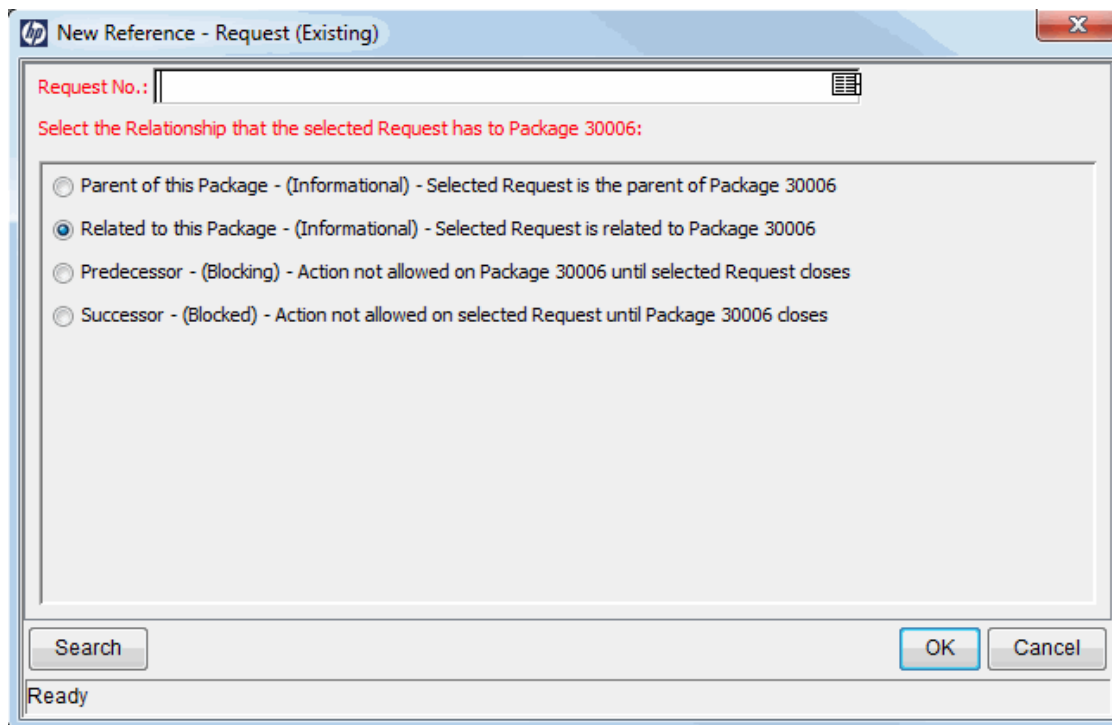
The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. Open the package to which you want to add a reference.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **Request (Existing)**, and then click **Add**.

The New Reference - Request (Existing) window opens.



7. To specify the request name in the **Request No** field, use the auto-complete list.
8. Under **Select the Relationship that the selected Request has to Package <Package Number>**, select the option that describes how the request is related to the package, and then click **OK**.

The **References** tab lists the existing request.

9. Click **Save** to save the package.

Adding New Requests as Package References

You can create new requests and add them as package references.

To reference a new request:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

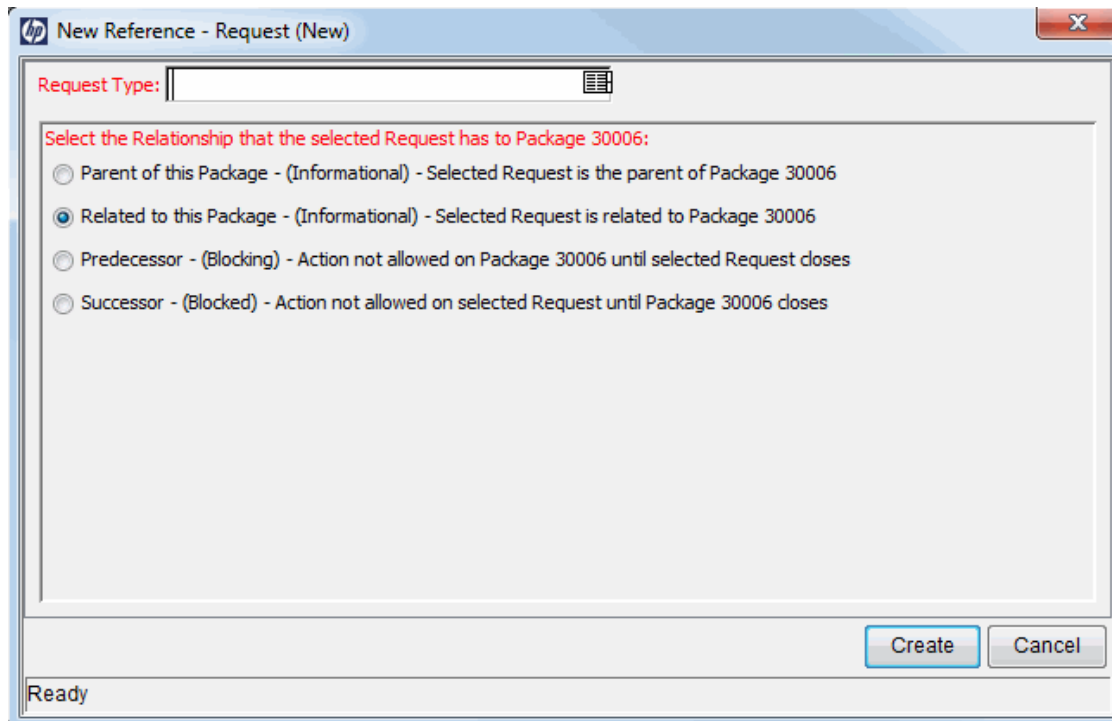
The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. Open the package to which you want to add a reference.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **Request (New)**, and then click **Add**.

The New Reference - Request (New) window opens.



7. To specify the type of request you want to create in the **Request Type** field, use the auto-complete list.
8. Under **Select the Relationship that the Request has to Package <Package Number>**, select the option that describes how the new request is related to the package, and then click **Create**.

The Create New Request page opens in a new browser window.

9. Complete all required fields (marked with a red asterisk).
10. In the optional fields and in the **Notes** tab, type any additional information about the request you want to make available to users.
11. Click **Submit**.

In the Package window, the **References** tab lists the new request.
12. Click **Save** to save the package.

Adding Tasks as Package References

You can add existing tasks as references to packages.

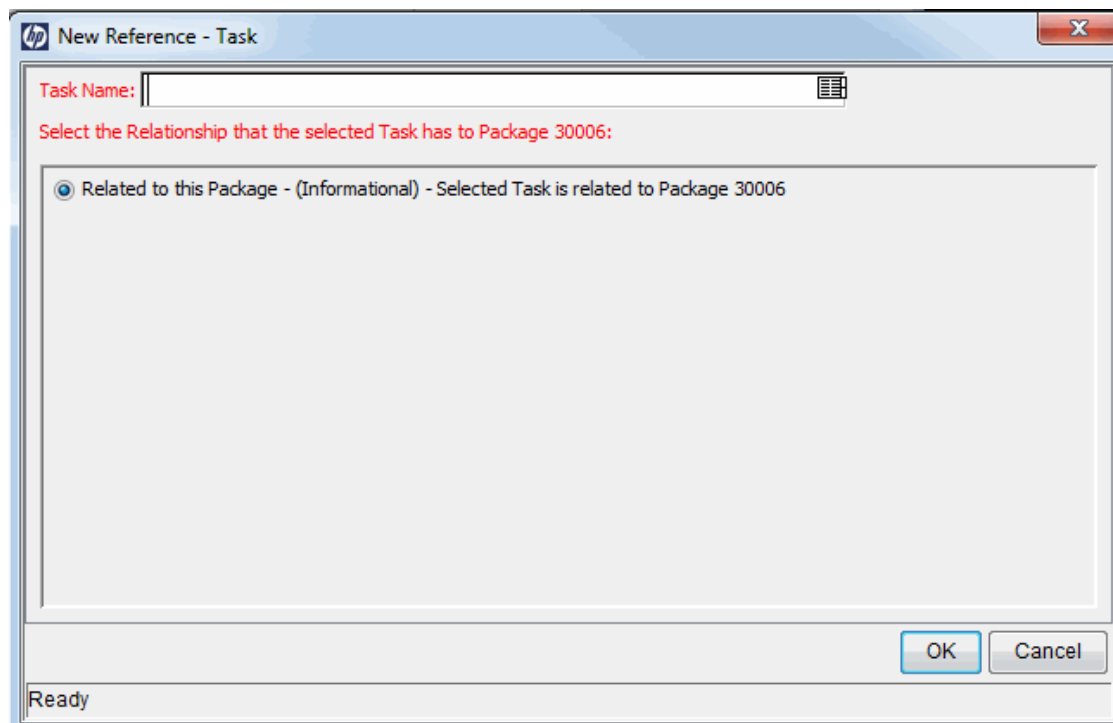
To reference an existing task:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.
4. Open the package to which you want to add a reference.
5. From the **New Reference** list, select **Task**, and then click **Add**.

The New Reference - Task window opens.



6. To specify a task in the **Task Name** field, use the auto-complete list.
7. Under **Select the Relationship that the selected task has to Package <Package Number>**, select the option that describes how the task is related to the package, and then click **OK**.

In the Package window, the **References** tab lists the task.

8. Click **Save** to save the package.

Adding URLs as Package References

You can reference a URL to a package.

To reference a URL:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

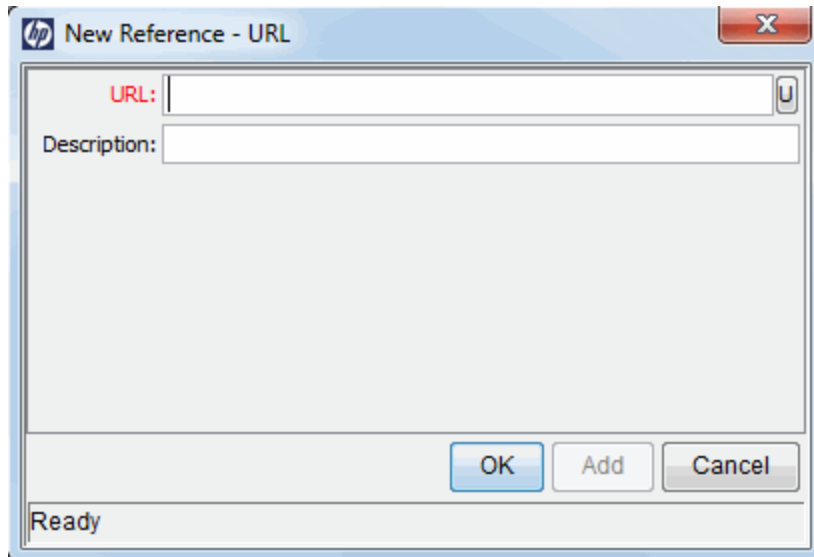
The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. Open the package to which you want to add a reference.
5. In the Package window, click the **References** tab.
6. From the **New Reference** list, select **URL**, and then click **Add**.

The New Reference URL window opens.



7. In the **URL** field, type the URL address.
8. To test the URL you specified, to the right of the **URL** field, click **U**.
9. In the **Description** field, you can type a description or an explanation of how the URL is related to the package, and then click **OK**.

In the Package window, the **References** tab displays the URLs.

10. Click **Save** to save the package.

Submitting Packages

After you complete a package, you can submit it. A complete package must have the following:

- A package number
- An associated workflow
- At least one package line

In the Package window, if a package is complete and eligible for submission, the **Submit** button is enabled in the bottom left corner.

To submit a completed package, click **Submit**.

Chapter 4: Processing Packages

- ["Overview of Processing Packages" below](#)
- ["Using Standard Interface to Process Packages" on the next page](#)
- ["Opening Packages from Standard Interface" on the next page](#)
- ["Approving Packages in Standard Interface" on page 75](#)
- ["Adding Notes to Packages in Standard Interface" on page 77](#)
- ["Adding References to Packages from Standard Interface" on page 78](#)
- ["Processing Packages Using PPM Workbench " on page 89](#)

Overview of Processing Packages

In Deployment Management, after a package has been submitted, you can process and manage it. Processing packages refers to working with the package as the package progresses through its workflow.

You can locate packages that require attention using one of the following methods:

- **Use the Package Workbench.** Use the **Query** tab in the Package Workbench to specify search criteria to find a package. After the package is found, highlight the package and click **Open**. The selected package opens in the Package window.
- **Use Portlets in the Standard Interface.** The quickest way to locate relevant packages is through the standard interface. When included on a PPM Dashboard page, the My Packages portlet displays all the packages you have created or that are assigned to you. Click a package number to open the package in the standard interface.
- **Use Searches in the Standard Interface.** Using search in the standard interface is another way to find a package. In the standard interface, on the menu bar, select **Search > Packages**. The Package Search page opens. In the Package Search page, complete the search criteria, and then click **Search**. The Package Search Results page opens. In the Package Search Results page, click a package number to open the package in the standard interface.
- **Use Notifications.** As a package proceeds through its workflow, email notifications can be sent to alert you of pending actions. The notification might include a link to the package. Click the link to

open the referenced package in the PPM Workbench. If you are not currently logged on to PPM Center, the Logon page opens.

- **Generate a Report on Open Packages (Standard Interface).** Deployment Management includes a predefined set of reports that generate HTML text and can be accessed by a Web browser. Among these reports is the Packages Pending Report, which reports on open packages with pending activity.

For information about generating and viewing Deployment Management reports, see the *Reports Guide and Reference*.

For detailed information on how to process packages in the standard interface, see ["Using Standard Interface to Process Packages"](#) below.

Using Standard Interface to Process Packages

You can use the package detail page in the standard interface to process a package through its entire workflow. You can add notes and references to the package, and make decisions about package status. For information on how to process packages from the PPM Workbench, see ["Processing Packages Using PPM Workbench"](#) on page 89.

Opening Packages from Standard Interface

This section provides information on how to open packages from the standard interface using the Search Packages page, using portlets, or using the package links in email notifications.

Opening Packages from Search Packages Page

To open a package using the Search Packages page:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Deployment Management > Search Packages**.

The Search Packages page opens.

3. Provide your search criteria, and then click **Search**.

The Package Search Results page lists the packages that match the criteria you specified.

4. In the **Pkg #** column, click the package number for the package you want to open.

The detail page for that package opens.

Opening Packages from My Packages Portlet

If the My Packages portlet is not displayed on one of your PPM Dashboard pages, you can add it. For information on how to add portlets to PPM Dashboard pages, see the *Creating Portlets and Modules* guide.

To use the My Packages portlet to open a package that you have created or a package that is assigned to you:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard**, and then select the name of a PPM Dashboard page that displays the My Packages portlet.
3. On the My Packages portlet, in the **Pkg #** column, select the number for the package you want to open.

The detail page for that package opens.

Opening Packages Using Notification Links

In some cases, as a package moves through the steps in its workflow, email notifications are sent to alert you of pending actions for a package. If the notification includes a link to the package, click the link to open the referenced package in the PPM Workbench. (If you are not logged on to PPM Center, the Logon page opens.)

Approving Packages in Standard Interface

To approve a package using the standard interface:

1. Log on to PPM Center.
2. Open the package that you want to approve.

For information on how to open the details page, see ["Opening Packages from Standard Interface" on page 74](#).

Package 30008

Save Reset

Header

*Package No.: 30008 Package Group: Created By: Joseph Banks
Description: Created On: January 18, 2016
*Workflow: Package Workplan Status: New

Assigned User: Priority: Low Parent:
Assigned Group: Package Type: Customization Priority Seq: 50
Percent Complete: 0

Status

View Lines: ☒ Pending Lines Only ☐ All Lines
View Steps: ☒ Steps Waiting my Action ☐ All Steps Refresh

Seq	Object Name	Object Type
This package does not have any Lines to show.		

Check All Clear All Line Details View Log

Check All Clear All Workflow Action

Notes

Notes to be added on save:

References

Reference Additions

New Reference: Attachment Add

References to be added on Save:

Open Remove

Save Reset

The **Status** section displays the package lines for the workflow.

3. In the **Status** section, next to **View Lines**, do one of the following:
 - To display only the package lines that are eligible for action, click **Pending Lines Only**, and then click **Refresh**.
 - To display all of the package lines for the workflow, click **All Lines**, and then click **Refresh**.
4. In the **Status** section, next to **View Steps**, do one of the following:
 - To display only workflow steps that await action, click **Steps Waiting my Action**, and then click **Refresh**.

- To display all workflow steps, click **All Steps**, and then click **Refresh**.

View All Lines		
Seq	Object Name	Object Type
1	mainpage.html	File Migration
2	Load_Distribution_Data.sql	File Migration

View Eligible Steps for Standard Deployment		
Seq	Object Name	Object Type
5	QA Test	
	Eligible	
	Eligible	

Under the workflow name are the numbered steps that must be completed and approved to move the workflow to completion. To navigate forward or backward through the workflow steps, use the directional arrows.

5. In the **View Eligible Steps for <Workflow Name>** section, select the option button that corresponds to the numbered workflow step that you want to approve (or not), and then select the **Eligible** checkbox for the specific line you want to approve (or not).

To select all of the steps, click **Check All**.

To clear all eligible checkboxes for the workflow step, click **Clear All**.

6. If one or more package lines are selected for action, click **Workflow Action**.

The Package Workflow Action page opens.

7. In the **Action Required** section, select the outcome of the step.

Because the outcome is configurable, it can be different for each workflow step, depending on the configuration at your site. In the above example, the possible actions are:

- If the workflow step is ready for approval, select **Approved**.
- If the workflow step is not ready for approval, select **Not Approved**.

8. Click **OK**.

The package details page opens. Because you approved (or disapproved) the selected workflow steps, the workflow has moved on to the next step. This process continues until the package moves through all of its steps to resolution.

Adding Notes to Packages in Standard Interface

The **Notes** section contains fields in which you can provide supplementary package information. To add a note, in the **Add Notes** subsection, type the information. To save the note, save the package.

View existing notes in the **Existing Notes** section. Existing notes are listed in chronological order with the most recent note listed first. You can filter existing notes, using **Show Only User Notes**, **Note Author**, and **Changed Fields**.

You cannot delete an existing note.

Figure 4-1. Notes section

Notes

Notes to be added on save:

▲
▼

Adding References to Packages from Standard Interface

In some cases, it might be useful to reference a Web-accessible file, a document, or file from a local machine to the package. You can add such references to a package from the standard interface.

You can add the following entities as package references:

- Attachments
- Packages (new or existing)
- Projects
- Releases
- Requests (new or existing)
- Tasks
- URLs

For some reference types (such as requests and other packages), you can create a functional dependency to the reference. For example, you can specify that a request is a predecessor to the

package. This means that the package cannot continue along its workflow until the referenced request closes. For more information about valid package references and the relationships they can have to packages, see ["Reference Relationships " on page 35](#).

This section provides information on how to add various types of references to a package from the standard interface. For information on how to add package references from the PPM Workbench, see ["Adding References to Packages from Package Workbench" on page 57](#).

Adding Attachments as References

To add an attachment as a package reference:

1. Log on to PPM Center.
2. Open or create a package.

Note: For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Attachment**, and then click **Add**.

The Add Document window opens.

5. Click **Choose File** and then locate and select the document file you want to attach as a reference.
6. In the **Author** field, you can replace the default value with the name of the attachment author.
7. In the **Description** field, type a description of the attachment.
8. Click **Add**.

On the Package page, the **References to be added on Save** field lists the referenced attachment.

9. Click **Save**.

The attachment is added as a request reference.

Adding Existing Packages as Package References

You can reference existing packages to a package.

To specify an existing package as a package reference:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Package (Existing)**, and then click **Add**.

The Add References: Package window opens.

PROJECT AND PORTFOLIO MANAGEMENT CENTER

Add Reference: Package

SearchCancel

Search for Packages to ViewClear Fields

Package #:

Workflow:

Object Type:

Object Name:

Assigned To:

Created By:

Creation Date From:To:

Keywords in Description:

Include Closed?

☐ Yes ☒ No

Eligible for My Action?

☐ Yes ☒ No

Submitted Only?

☐ Yes ☒ No

Preventing Action On:

☐ Requests

☐ Packages

Sort By:

Package Number

☐ Ascending

☒ Descending

*Maximum Results Per Page:

50

SearchCancel

5. Provide your search criteria, and then click **Search**.

The **Package Search Results** section lists the packages that match your search criteria.

6. Select the checkbox for the package that you want to add as a reference, and then click **Add**.

On the Package page, the **References to be added on Save** field lists the referenced package.

7. Click **Save**.

Adding New Packages as Package References

You can reference a new package to a package.

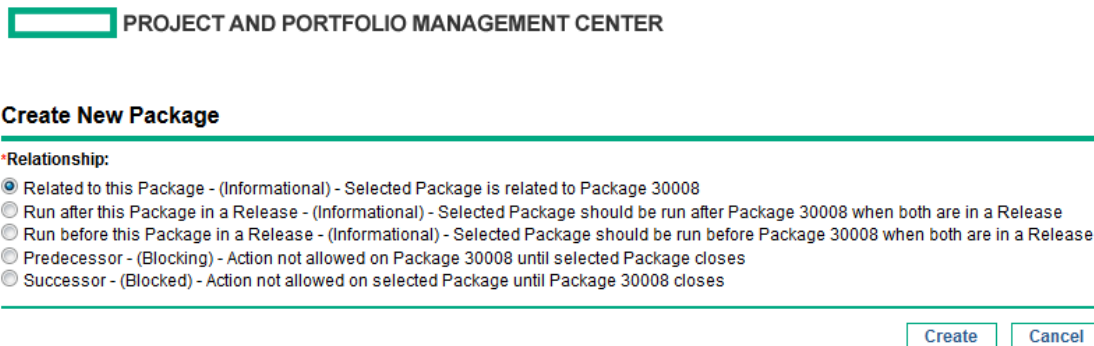
To add a new package as a package reference:

1. Log on to PPM Center.
2. Open a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Package (New)**, and then click **Add**.

The Create New Package window opens.



PROJECT AND PORTFOLIO MANAGEMENT CENTER

Create New Package

***Relationship:**

- ☒ Related to this Package - (Informational) - Selected Package is related to Package 30008
- ☐ Run after this Package in a Release - (Informational) - Selected Package should be run after Package 30008 when both are in a Release
- ☐ Run before this Package in a Release - (Informational) - Selected Package should be run before Package 30008 when both are in a Release
- ☐ Predecessor - (Blocking) - Action not allowed on Package 30008 until selected Package closes
- ☐ Successor - (Blocked) - Action not allowed on selected Package until Package 30008 closes

5. Under **Relationship** select the option that describes the relationship that the new package has to the open package.

For information about the different types of reference relationships, see ["Reference Relationships" on page 35](#).

6. Click **Create**. The package page opens.
7. In the **Workflow** field, type the name of a workflow to apply to the new package.
8. Type any optional information you want to save, and modify any values that you want to change, and then click **Save**.

On the Package page, the **References to be added on Save** field lists the new referenced package.

9. Click **Save**.

Attaching Programs as Package References

You can reference existing programs to a package.

To specify a program as a package reference:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Program**, and then click **Add**.

The Reference Program window opens.

PROJECT AND PORTFOLIO MANAGEMENT CENTER

Reference Program

*Program:

*Relationship:

☒ Related to this Package - (Informational) - Selected Program is related to Package 30008

5. To specify the name of the program to reference in the **Program** field, select the name from the auto-complete list, and then click **Add**.

On the Package page, the **References to be added on Save** field lists the program you selected.

6. Click **Save**.

Attaching Projects as Package References

To specify a project as a package reference:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Project**, and then click **Add**.

The Add Reference: Project window opens.

PROJECT AND PORTFOLIO MANAGEMENT CENTER

Add Reference: Project

Search for Projects to View

Project Name contains:

Project Type:

Planned Start Date From: To:

Planned Finish Date From: To:

Include Finished Projects: ☐ Yes ☒ No

Health: ☐ ☐ ☐ ☐ ☐ None

Project Manager:

Associated Programs:

Region:

Sort By: ☒ Ascending ☐ Descending ***Results Displayed Per Page:**

5. Provide your search criteria in one or more of the available fields, and then click **Search**.

The Add Reference: Project window lists the projects that match the search criteria you specified.

6. In the **Select Project to View** section, select the checkbox for the project that you want to add as a package reference.
7. Click **Add**.

On the Package page, the **References to be added on Save** field lists the referenced project.

8. Click **Save**.

Adding Releases as Package References

You can add existing releases as package references.

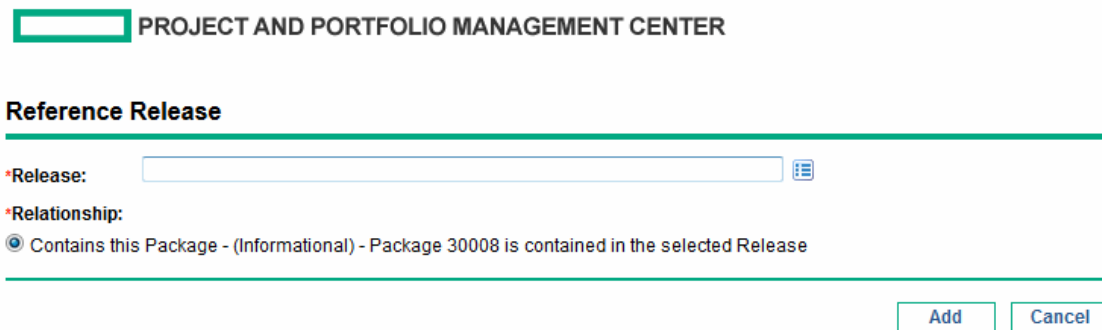
To reference an existing release to a package:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Release**, and then click **Add**.

The Reference Release window opens.



PROJECT AND PORTFOLIO MANAGEMENT CENTER

Reference Release

*Release:

*Relationship:

☒ Contains this Package - (Informational) - Package 30008 is contained in the selected Release

Add Cancel

5. To specify the name of the release to reference in the **Release** field, select it from the auto-complete list, and then click **Add**.

On the Package page, the **References to be added on Save** field lists the referenced release.

6. Click **Save**.

Adding Existing Requests as Package References

You can reference existing requests to packages.

To reference an existing request:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Request (Existing)**, and then click **Add**.

The Add Reference: Request window opens.

- Specify search criteria for the request, and then click **Search**.

Add Reference: Request Search Cancel

Search for Requests to View Clear Fields

Request Type: Advanced Search

Status: Priority:

Assigned To: Assigned To Group:

Created By: Request Sub Type:

Department: Application:

Workflow: Request Group:

Contact: Company Name:

Linked Project: Request #:

Creation Date From: **To:**

Last Update Date From: **To:**

Request Key Words: Search the content of Request Notes and Descriptions.

Preventing Action On: ☐ Requests ☐ Packages **Eligible for My Action?** ☐ Yes ☒ No

Include Closed? ☐ Yes ☒ No

Additional Filters: Query Builder

Sort By: ☐ Ascending ☒ Descending

***Maximum Results Per Page:** ***Limit Rows Returned To:** **Show Total Number of Records:** ☐

Choose Columns

Available Columns

- % Complete
- Application
- Assigned To Group
- Company Name
- Contact
- Creation Date
- Department
- Last Updated
- Request Group

Selected Columns

- Req # *
- Request Type
- Description
- Status
- Assigned To
- Priority
- Created By

Note: Columns followed by an asterisk (*) cannot be removed from the display.

Search Cancel

- Under **Select which Relationship the selected Requests will have to Package #**, select the option that describes the relationship that the new request has to the open package.

For information about the different types of reference relationships, see ["Reference Relationships" on page 35](#).

7. Select the checkbox for the request that you want to add as a package reference, and then click **Add**.

On the Package page, the **References to be added on Save** field lists the referenced request.

8. Click **Save**.

Adding New Requests as Package References

To reference a new request:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Request (New)**, and then click **Add**.

The Create New Request window opens.

PROJECT AND PORTFOLIO MANAGEMENT CENTER

Create New Request

*Request Type:

*Relationship:

☐ Parent of this Package - (Informational) - Selected Request is the parent of Package 30008

☒ Related to this Package - (Informational) - Selected Request is related to Package 30008

☐ Predecessor - (Blocking) - Action not allowed on Package 30008 until selected Request closes

☐ Successor - (Blocked) - Action not allowed on selected Request until Package 30008 closes

5. From the **Request Type** list, select the type of request you want to create as a reference to the open package.

6. Under **Relationship**, select the option that describes the relationship that the new request has to the open package.

For a list of reference types, their definitions, and possible dependency relationships, see ["Reference Relationships " on page 35](#).

7. Click **Create**.

The Create New <Request Type> window opens.

8. Provide data in all of the required fields (marked with a red asterisk), and any optional data about the new request that you want to record.

9. Click **Submit**.

On the Package page, the **References to be added on Save** field lists the new request.

10. Click **Save**.

Adding Tasks as Package References

You can reference existing tasks to packages.

To reference an existing task:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **Task**, and then click **Add**.

The Add Reference: Task window opens.

5. Provide your search criteria in any of the available fields, and then click **Search**.

The Add Reference: Task window lists the tasks that match the search criteria you specified.

PROJECT AND PORTFOLIO MANAGEMENT CENTER

Add Reference: Task

Search for Tasks to View

* indicates that at least one field must be populated.

*Task Name starts with:

*Resource:

Task Status:

Include finished Tasks?

☐ Yes

☒ No

Show only tasks with exceptions?

☐ Yes

☒ No

Show only milestones?

☐ Yes

☒ No

Scheduled Start Date From:

To:

Scheduled Finish Date From:

To:

Search in projects that meet the following criteria

*Project Name:

*Project Manager:

admin

Sort By:

Task Name

☒ Ascending

☐ Descending

*Results Displayed Per Page:

50

Search

6. In the **Select Task to View** section, select the checkbox for the task you want to add as a reference to the open package, and then click **Add**.

On the Package page, the **References to be added on Save** field lists the task you selected.

7. Click **Save**.

Adding URLs as Package References

You can reference an existing URL to a package.

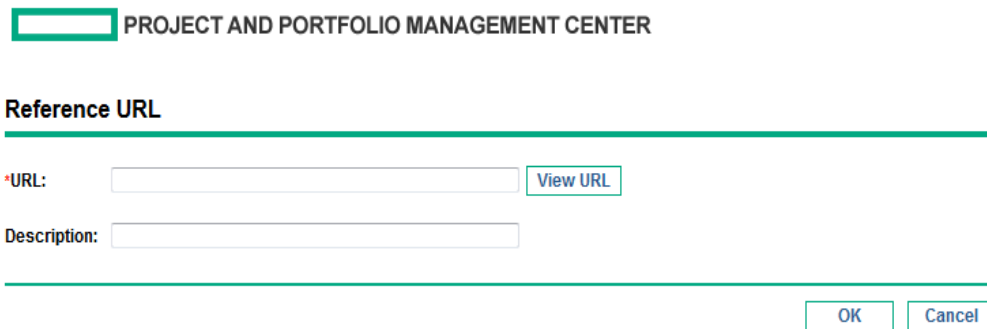
To add a URL as a package reference:

1. Log on to PPM Center.
2. Open or create a package.

For information on how to open a package, see ["Opening Packages from Standard Interface" on page 74](#).

3. Scroll to the **References** section.
4. From the **New Reference** list, select **URL**, and then click **Add**.

The Reference URL window opens.



PROJECT AND PORTFOLIO MANAGEMENT CENTER

Reference URL

*URL: [View URL](#)

Description:

[OK](#) [Cancel](#)

5. In the **URL** field, type the URL address.
6. To test the URL you specified in your default browser window, to the right of the **URL** field, click **U**.
7. In the **Description** field, type a description or an explanation of how the URL is related to the package.
8. Click **OK**.

On the Package page, the **References to be added on Save** field lists the URL you specified.

9. Click **Save**.

Processing Packages Using PPM Workbench

You can process submitted packages from the PPM Workbench using the Package window. You can use the Package window to process a submitted package through its workflow. You can add notes and references to the package, make decisions on package status, and run actions for the package. You can also change or delete a package from the Package window.

Opening Packages from PPM Workbench

To open a package from the PPM Workbench:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Packages Workbench opens.

4. To display all the existing packages, click **List**.

To restrict the search, provide information in one or more of the search fields.

5. Select a listed package, and then click **Open**.

Checking Package Status

Each package line must follow the business process defined by its assigned workflow. You can view all the workflow and subworkflow steps for each line on the **Status** tab in the Package window.

To view the status of a submitted package:

1. Open a submitted package.

For information on how to open a package, see ["Opening Packages from PPM Workbench " on the previous page](#).

The Package window opens.

2. Click the **Status** tab.
3. Review the status of the package.

You can now review the status of each package line. The result of each workflow step is recorded in the package line row, so that you can quickly get an idea of which lines have closed with success or closed with a failure.

Although all the workflow steps are listed, a package line does not necessarily go through every step before it is resolved. For example, you might have a rework step that is only used if rework is required. For more information about the package, select one of the logs, views, or reports related to the package. For more information about the **Status** tab, see ["Package Window, Status Tab " on page 29](#).

Acting on Eligible Steps

After a package is submitted, each package line has one or more workflow steps set to **Eligible**, as shown in "Figure 4-2. Status tab eligible steps" below. This indicates that the execution or decision steps must be performed first in the resolution process for the package. If you have permission to act on the eligible step, the text in the **Status** column is displayed in bold text.

If the eligible step is:

- *Execution* workflow step, you must perform an action.
- *Decision* workflow step, you must specify a decision.

After you perform the action or make the decision, Deployment Management displays the outcome.

Figure 4-2. Status tab eligible steps

The screenshot shows a window titled "Package: 30006" with a "Status" tab selected. The "Package Information" section includes fields for Package No. (30006), Package Group, Description (CREATED by Test Macro), Workflow ((REFERENCE) Dev -> Test -> Prod), Assigned User (Admin User), Assigned Group (ITG User), Priority (Normal), Package Type (Customization), Created By (Admin User), Created On (July 9, 2012), Package Status (In Progress), Parent, and Priority Seq (60). The "Package Lines" section shows a table with columns for Seq, Object Name, Object Type, and workflow steps. The table contains three rows, all with "Eligible" status in the "Design Review" column.

Seq	Object Name	Object Type	1 Design Review	2 Evaluate	3 Migrate to Test	4 QA Test	Migrate
1		File Client->Client	Eligible				
2	test	File Migration	Eligible				
3	e	RCS Server File	Eligible				

At the bottom of the window, there are buttons for "Refresh", "Select All", "All", "View -->", "Line Exec Log (Latest)", "Action", "Submit", "OK", "Save", and "Cancel". The status bar at the bottom indicates "Ready".

Processing a Workflow Step

To process a workflow step:

1. Open a submitted package.

For information on how to open a package, see ["Opening Packages from PPM Workbench " on page 89.](#)

The Package window opens.

2. Click the **Status** tab.
3. Select one or more package lines.

You can select a single step for a single package line, or multiple steps for multiple lines. To select all the steps on all the open package lines that are eligible for action, click **Select All**.

You cannot act on multiple workflow steps at one time. If you select cells for multiple workflow steps, the **Action** button remains disabled. If you have the security privileges to perform the given workflow step, the button is enabled.

After you select a workflow step for which you have the security permission to act on the workflow step, the label on the button at the bottom-right of the **Status** tab changes from **Action** to the workflow step name.

4. To perform an action or decision on a selected step, click **Action**.

A decision window or the execution window opens.

Each step is configured with a selection of valid results.

5. If a decision window is open, from the **Result** list, select a decision result. If an execution window is open, in the list, select **Execute Now**, **Schedule Execution**, or **Bypass Execution**.
6. In the **Notes** field, you can type any comments you want to save.

For information about the decision window, see ["Acting on Decision Workflow Steps " on the next page.](#) For information about the execution window, see ["Acting on Execution Workflow Steps" on page 94.](#)

7. Click **OK**.

Whether the step is a decision or an execution, the result of the step is processed by the workflow engine and can lead to a number of changes. Based on the workflow definition (which can contain multiple workflow steps and subworkflows) the given workflow step result can cause additional workflow steps to become eligible, indicating the next actions to be performed in the package resolution process.

When subsequent steps become eligible, those steps are completed sequentially, making eligible the next workflow steps in line. This process continues until the package reaches its final state and is resolved, usually at a close step.

Acting on Decision Workflow Steps

Decision workflow steps are steps for which you (or a group) must indicate the outcome. For example, Approve Migration is an example of a decision workflow step. You can either act on the decision step yourself or delegate the decision.

To act on a decision workflow step:

1. In the Package window, select the **Status** tab.

Package: 30006

Package Information

Package No.: 30006 Package Group: Created By: Admin User

Description: CREATED by Test Macro. Created On: July 9, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: In Progress

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 60

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Seq	Object Name	Object Type	1 Design Review	2 Evaluate	3 Migrate to Test	4 QA Test	Migr
1		File Client->Client	Eligible				
2	test	File Migration	Eligible				
3	e	RCS Server File	Eligible				

Refresh Select All All View --> Line Exec Log (Latest) Multi Steps

Submit OK Save Cancel

Ready

2. Select an eligible decision workflow step.

For information on how to access the **Status** tab and select an eligible decision workflow step, see ["Acting on Eligible Steps" on page 91](#).

The **Action** button label changes, depending on the step selected. For example, if you click Eligible for QA Test, the Action button label changes to QA Test.

Note: If you cannot see the **Action** button on the **Status** tab, that means that a security group has not been assigned to the workflow step.

3. Click the action button. For the example given in step 2, click **QA Test**. The QA Test Package

Decision window opens.

4. In the list, select the applicable action needed (**Decide Now** or **Delegate Decision**).
 - If you select **Decide Now**, you must make a decision about the decision workflow step; for example, **Approve**. To make a decision regarding the decision workflow step:
 - i. From the **Result** list, select the result.
 - ii. In the **Notes** field, type helpful information about the decision you made, and then click **OK**.

The decision window closes. The decision results are added to the **Status** tab.

- If you select **Delegate Decision**, you must then assign the decision to someone. To delegate a decision:
 - i. To select a resource, use the **Delegate To** auto-complete list.
 - ii. In the **Notes** field, type helpful information about the decision that needs to be made, and then click **OK**.

The decision window closes, and the results are listed on the **Status** tab.

5. Click **OK**.

The decision is entered into the system. If the workflow step was configured so that more than one person must decide on the result, the package line may not move to the next step until all required decisions are made. If a decision workflow step requires that more than one person decide on the result, you can view the current decision results for the workflow step using the Decision Detail view.

Acting on Execution Workflow Steps

Execution workflow steps are workflow steps where the Deployment Management system performs an action, and then updates the step with its result. These actions can be as simple as calculating the value for a token or as complex as copying files, running programs, or updating Web pages.

To act on an execution workflow step:

1. In the Package window, on the **Status** tab, select the eligible decision workflow step.

For information on how to access the Status tab and select an eligible decision workflow step, see ["Acting on Eligible Steps" on page 91](#).

The **Action** button is enabled. Notice that the button label changes with the step selected. For the following example, the action button label changed to **SAP_Export**.

The screenshot shows a window titled "Package: 30134". It has two main tabs: "Package Information" and "Package Lines".

Package Information Tab:

- Package No.: 30134
- Package Group: [empty]
- Created By: Admin User
- Description: CREATED by Test Macro.
- Created On: December 11, 2012
- Workflow: (REFERENCE) Dev -> Test -> Prod
- Package Status: In Progress
- Assigned User: [empty]
- Priority: Low
- Parent: [empty]
- Assigned Group: [empty]
- Package Type: Customization
- Priority Seq: 50
- Percent Complete: 0

Package Lines Tab:

Seq	Object Name	Object Type	Package	2 Code Review	3 SAP_EXPORT
1	a	File Client->Client		Approved	Eligible

At the bottom of the window, there are buttons: Refresh, Select All, + All, - All, View ->, Line Exec Log (Latest), and a button labeled SAP_EXPORT. There are also Submit, OK, Save, and Cancel buttons at the very bottom.

2. On the **Status** tab, click the action button, which for this example is **SAP_Export**. The SAP_Export execution window opens.
3. In the list, select **Execute Now**, **Schedule Execution**, or **Bypass Execution**.
 - If you select **Execute Now** and click **OK**, you run the workflow step. The Execution window closes. The result of the workflow step is displayed on the package line at the workflow step. This process could be a software migration, execution of a PL/SQL function, the closing of the package line, or other activity. The execution engine runs the step and sets the result accordingly.
 - If you select **Schedule Execution**, the **Execution Date** and **Execution Time** fields are visible. Select a date and time, and then click **OK**. The Execution window closes. The execution schedule is displayed on the package line at the workflow step. This process could be a software migration, execution of a PL/SQL function, the closing of the package line, or other activity. The execution engine runs the step and sets the results accordingly.
 - If you select **Bypass Execution**, the **Execution Result** field is visible. Select the results, and then click **OK**. The execution window closes and the selected result is displayed on the package line at the workflow step.
4. Click **OK**.

Adding Notes

In the Package window, the **Notes** tab ("Figure 4-3. Notes tab in the Package window" below) displays additional package information.

Figure 4-3. Notes tab in the Package window

The screenshot shows a software window titled "Package: 30006". The "Package Information" section contains the following fields: Package No. (30006), Package Group (empty), Created By (Admin User), Description (CREATED by Test Macro.), Created On (July 9, 2012), Workflow ((REFERENCE) Dev -> Test -> Prod), Package Status (New), Assigned User (Admin User), Priority (Normal), Parent (empty), Assigned Group (ITG User), Package Type (Customization), and Priority Seq (60). Below this is a "Package Lines" section with tabs for "Package Lines", "Status", "Notes", "References", and "User Data". The "Notes" tab is active, showing "Existing Notes" (Admin User (admin), November 1, 2012 09:49:20 AM CST, Admin User (admin)) and a "New Notes" text area. At the bottom are "Submit", "Enlarge", "OK", "Save", and "Cancel" buttons. The status bar at the bottom left says "Ready".

To add a note, type the text in the **New Notes** field, and then click **Save**. The note is added to the **Existing Notes** field.

Adding, Updating, and Deleting References

You can add and update package references from the **References** tab of the Package window in the PPM Workbench. The following sections provide information about how to add, update, and delete references.

- ["Adding References " on the next page](#)
- ["Updating Reference Relationships" on the next page](#)

- ["Deleting References " on the next page](#)

Adding References

The Package window **References** section contains additional package information. For example, you might add a document or URL as a reference to a package. You can add the following entities as package references:

- Attachments
- Packages (New and Existing)
- Projects
- Releases
- Requests (New and Existing)
- Tasks
- URLs

For some references (such as requests and other packages), a functional dependency to the original package can be created. For example, you can specify that a request is a predecessor to the package. This means the package will not continue until the request is closed. For a list of the references and their possible dependency relationships, see ["Reference Relationships " on page 35](#).

For information on how to add a reference, see ["Adding References to Packages from Package Workbench" on page 57](#) or ["Adding References to Packages from Standard Interface" on page 78](#).

Updating Reference Relationships

To update an existing reference relationship from the PPM Workbench:

1. Open a package.

For information on how to open a package, see ["Opening Packages from PPM Workbench " on page 89](#).

2. Click the **References** tab.
3. Click the **Relationship** field for the referenced entity, and then select an item from the displayed

list.

Package: 30006

Package Information

Package No.: 30006 Package Group: Created By: Admin User

Description: CREATED by Test Macro. Created On: July 9, 2012

Workflow: (REFERENCE) Dev -> Test -> Prod Package Status: In Progress

Assigned User: Admin User Priority: Normal Parent:

Assigned Group: ITG User Package Type: Customization Priority Seq: 60

Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Type	Name	Details	Status	% Complete	Description	Relationship	Info
Package	30004		New	0%	CREATED by Test Macro.	Related to this Package	Info
Package	30005		New	0%	CREATED by Test Macro.	Related to this Package	Info

Run after this Package in a Release

Run before this Package in a Release

Predecessor

Successor

Items in **bold** are actively controlling this Package

New Reference Attachment Add Remove Open Reference

Submit OK Save Cancel

Ready

4. Click **OK** or **Save**.

The change to the package is saved.

Deleting References

To delete a reference from the PPM Workbench:

1. Open a package.

For information on how to open a package, see ["Opening Packages from PPM Workbench "](#) on [page 89](#).

2. Click the **References** tab.
3. Select the reference, and then click **Remove**.

The reference is deleted.

4. Click **Save** to confirm that you want to delete the reference(s).
5. Click **Cancel** to back out of the reference and cancel removing (or deleting) any references.

Adding a Package Line to an In-Progress Package

You may want to add a package line to a package that is already submitted. You can add package lines to a package that has a status of In Progress. For information on how to do this, see ["Adding Lines to Packages " on page 53](#).

A new package line is not submitted until you save the package. After you save the package, the new package line is submitted to the first step in the workflow, and the user can process it separately until it catches up with the other lines in the package. At submission, the new package line is not automatically assigned the same status as the other lines.

Chapter 5: Managing Packages

- ["Managing Packages in Deployment Management" below](#)
- ["Merging Packages" below](#)
- ["Creating New Package Groups " on page 102](#)
- ["Editing Package Groups" on page 104](#)
- ["Deleting Packages " on page 106](#)
- ["Cancelling Package Lines " on page 106](#)

Managing Packages in Deployment Management

After a package is submitted in Deployment Management, it can be processed and managed. Package management involves copying, merging, grouping, editing, and deleting packages, modifying package groups, and cancelling package lines. The following sections address all of these tasks, except for copying packages. The procedure for copying packages is provided in ["Creating Packages by Copying Existing Packages " on page 48](#).

Merging Packages

You can generate a new package by merging two or more existing packages. This is useful if you want to generate a single package consisting of certain package lines contained in separate packages.

To merge two packages:

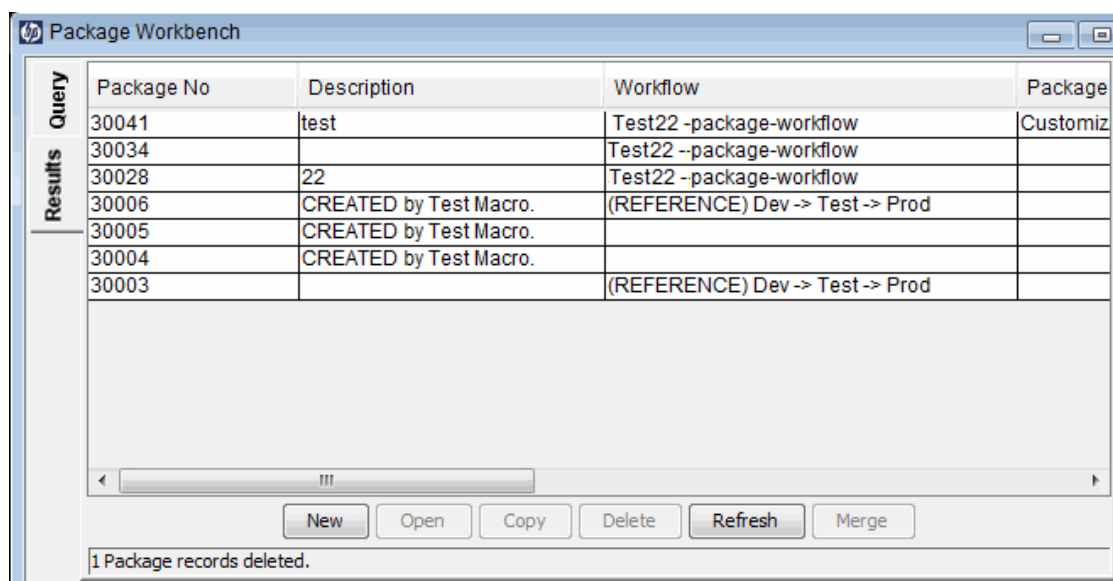
1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Deployment Mgmt > Packages**.
The Package Workbench opens.

4. On the **Query** tab, click **List**.

The **Results** tab lists all of the existing packages.

5. Select the packages to merge.

To select nonadjacent rows, use the Ctrl key. To select adjacent rows, use the Shift key.



6. On the **Results** tab, click **Merge**.

The Merge Package window opens to the **Options** tab.

The screenshot shows the 'Merge Package' dialog box. The 'Merged Package Information' section contains the following fields:

- Copy Header From: 30006 (dropdown)
- New Package No: 30049 (text field)
- Description: Copy of 30006,30005,30004,30003 (text field)
- Workflow: (REFERENCE) Dev -> Test -> Prod (text field with a list icon)

The 'Options' tab is selected, showing the following options:

Option	Yes	No
Copy Package Lines?	<input checked="" type="radio"/>	<input type="radio"/>
Copy Closed Lines?	<input checked="" type="radio"/>	<input type="radio"/>
Copy Cancelled Lines?	<input type="radio"/>	<input type="radio"/>
Copy Header's Notes?	<input type="radio"/>	<input type="radio"/>
Copy Header's User Data?	<input checked="" type="radio"/>	<input type="radio"/>
Submit New Package?	<input type="radio"/>	<input type="radio"/>

At the bottom right are 'OK' and 'Cancel' buttons. The status bar at the bottom left says 'Loading complete.'

7. In the **New Package Number** field, you can either leave the generated package number, or type a different unique package number.
8. In the **Workflow** field, you can leave the default workflow name, or select a different one in the auto-complete list.
9. On the **Options** tab, select **Yes** or **No** for the listed options.
10. Click **OK**.

The Package Workbench prompts you to indicate whether you want to edit the new (merged) package.

11. To edit the package, click **Yes**. To save and close the package, click **No**.

Creating New Package Groups

It is often useful to link a new package to a package group for tracking and reporting purposes. After you link packages to package groups, you can use the package group to search for packages or in building custom portlets. You create new package groups from the Package Workbench.

To create a package group:

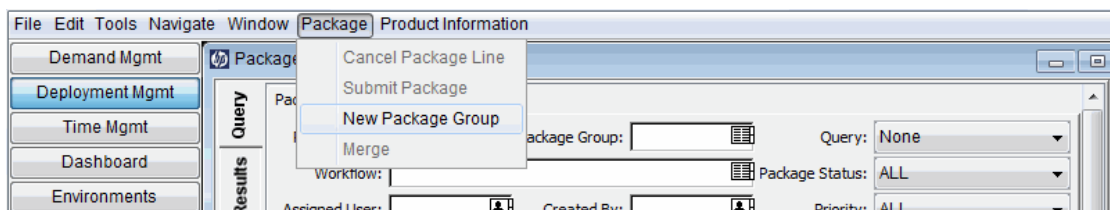
1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

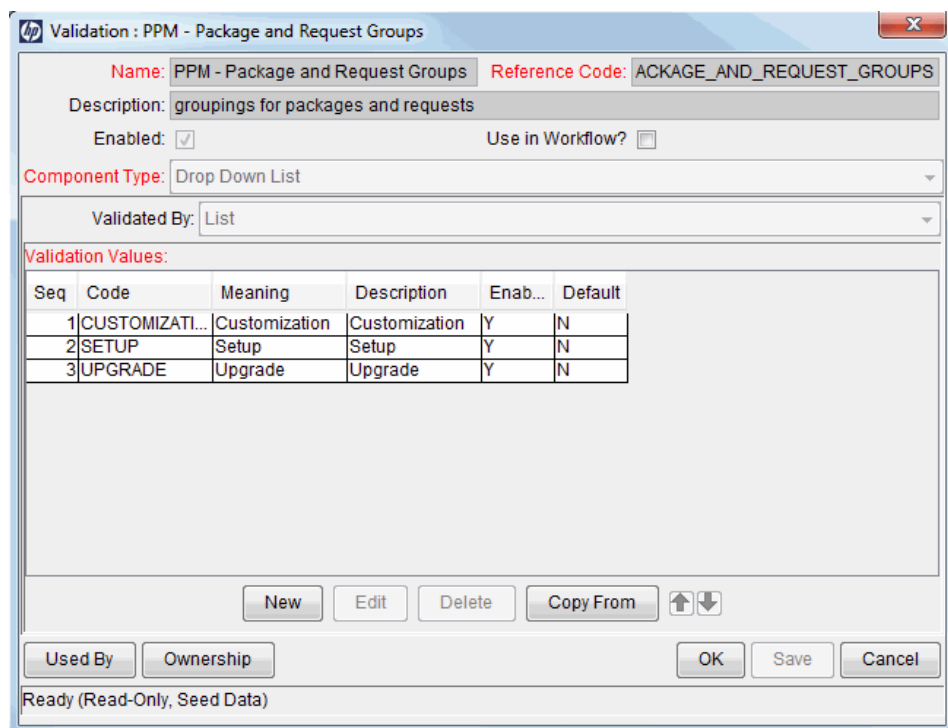
3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. From the **Package** menu, select **New Package Group**.

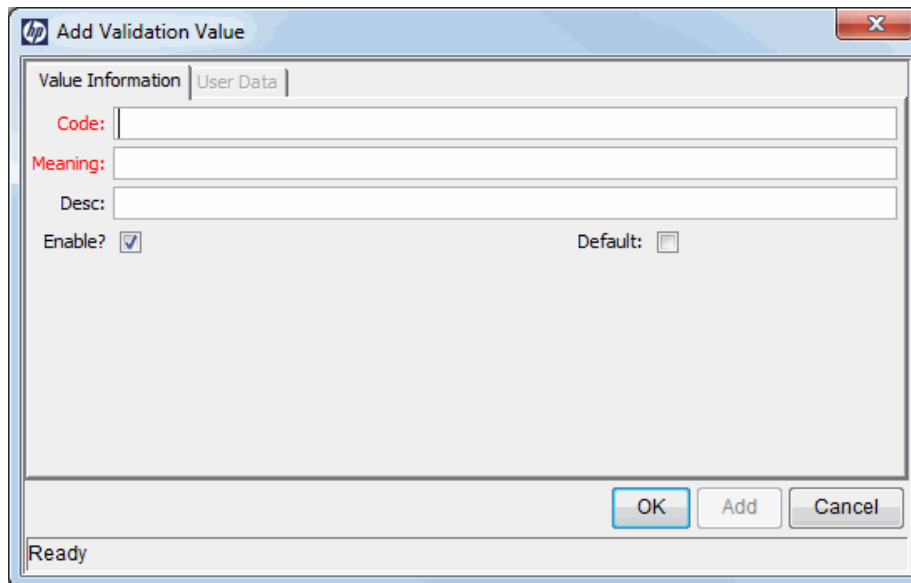


The Validation: KNTA - Package and Request Groups window opens and displays the existing groups for packages and requests.



5. Click **New**.

The Add Validation Value window opens to the **Value Information** tab.



6. In the **Code** field, type the token name for the new **Package Group** list item.
7. In the **Meaning** field, type the name to display for this item in the **Package Group** list.
8. In the **Desc** field, type a short description of the package group.
9. To disable the new list value, clear the **Enable?** checkbox.
10. To make this value the default selection in the **Package Group** list, select the **Default** checkbox.
11. Click **OK**.

Editing Package Groups

You can edit existing package groups from within the PPM Workbench. You can only change the KNTA Package and Request Groups Validation list if you have the required access grants and security privileges. For information about the licenses and access grants required to work with packages in Deployment Management, see the *Security Model Guide and Reference*.

Before you add or edit any package groups, consult your application administrator. Package groups are typically generated to adhere to specific business application standards.

To edit a package group:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

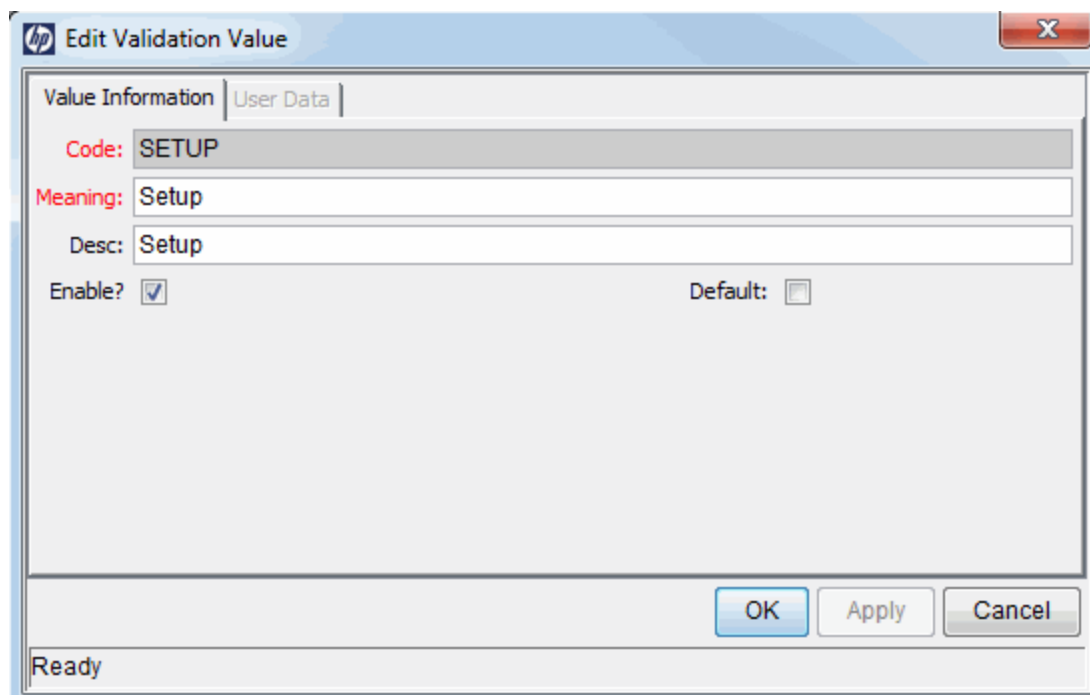
The Package Workbench opens.

4. Select **Package > New Package Group**.

The Validation: KNTA - Package and Request Groups window opens and lists existing package groups.

5. Select the package group you want to change, and then click **Edit**.

The Edit Validation Value window opens.



6. Edit the field values, as necessary, and then click **OK**.

The new validations are added to the Validation: KNTA - Package and Request Groups window.

7. Click **OK**.

Deleting Packages

You can delete packages from the Packages Workbench.

To delete a package:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. To see a list of all the packages, on the **Query** tab, click **List**.

The **Results** tab displays the packages list.

5. Select the packages you want to delete, and then click **Delete**.

Note: To select nonadjacent rows, press and hold the **Ctrl** key. To select adjacent rows, press and hold the **Shift** key.

The Packages Workbench prompts you to confirm that you want to delete the package.

6. Click **Yes**.

Cancelling Package Lines

In some instances, you might want to cancel package lines because, for example, the files are out of date or are no longer required. You use the Package Workbench to cancel package line.

To cancel a package line:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Deployment Mgmt > Packages**.

The Package Workbench opens.

4. To see a list of all of the packages, on the **Query** tab, click **List**.

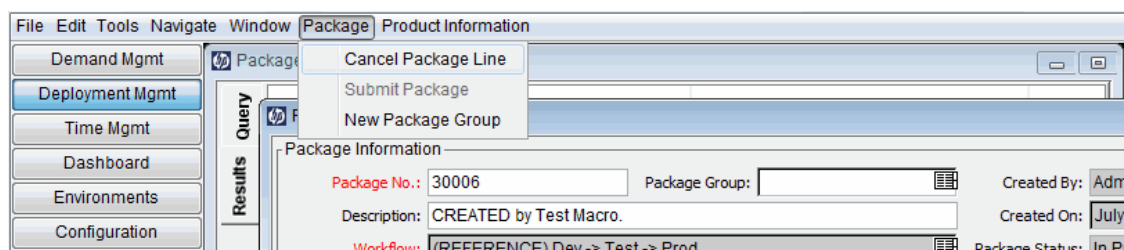
The **Results** tab displays the list.

5. Select a package that contains lines you want to cancel, and then click **Open**.

The Package window opens.

6. On the **Package Line** tab, select the package line to cancel.

7. From the menu bar, select **Package > Cancel Package Line**.



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Feedback on Deployment Management User's Guide (Project and Portfolio Management Center 9.40)

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 your_IE_team_PDL@hpe.com.

We appreciate your feedback!