HP Change Control Management

for the Windows® 2000 Server Service Pack 4 and
Windows® 2003 Enterprise Edition Service Pack 1 operating systems

Software Version: 3.00

User's Guide

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- Software version number, which indicates the software version
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To register for an HP Passport ID, go to: **www.managementsoftware.hp.com/passport-registration.html**

Table of Contents

Welcome to This Guide

Welcome to the *HP Change Control Management User's Guide*, which explains how to work with HP Change Control Management software in order to facilitate the Change Advisory Board's change approval process. Using HP Change Control Management, those involved in the change process and the Change Advisory Board can make more informed, and therefore more accurate, decisions regarding the approval of planned changes, thereby minimizing the business risks and costs associated with the change process. In addition, HP Change Control Management facilitates the change approval process itself.

How This Guide Is Organized

This guide contains the following chapters:

Chapter 1 **Introduction to HP Change Control Management**

Describes the various components of the HP Change Control Management application and provides information on how to access HP Change Control Management.

Chapter 2 **Working with the Dashboard**

Describes how to work with the HP Change Control Management Dashboard, which displays change request data in real time using graphical displays.

Chapter 3 **The Change Analysis Module at a Glance**

Introduces the key elements of the Change Analysis module.

Chapter 4 **Working in the Change Requests Mode**

Describes the different change request views in the Change Analysis module's Change Requests mode.

Chapter 5 **Working in the Action Items Mode**

Describes how to work with action items in the Change Analysis module's Action Items mode.

Chapter 6 **Filtering Change Requests and Action Items**

Describes how to filter the change requests displayed in the Change Requests mode and the action items displayed in the Action Items mode.

Chapter 7 **Working with the Details and Analysis Pane**

Describes the change request information displayed across the different tabs in the Change Analysis module's Details and Analysis pane, which is identical for both the Change Requests and Action Items modes.

Chapter 8 Configuring User Settings

Describes how to configure properties for the current HP Change Control Management user, select the applications you want to associate with the user, and define user preferences.

Who Should Read This Guide

This guide is intended for members of the Change Advisory Board and others involved in the change process who are responsible for assessing the business impact of change requests on your organization's IT environment and approving or rejecting the proposed changes.

HP Change Control Management Documentation

HP Change Control Management comes with the following documentation:

HP Change Control Management Installation and Configuration Guide explains how to install HP Change Control Management and configure the various parts of the HP Change Control Management system. This guide is accessible in the following formats, from the following locations:

- in PDF format on the HP Change Control Management CD-ROM
- in both PDF format and online HTML help format by selecting **Help** > **HP Change Control Management Documentation Library** from the HP Change Control Management application
- in HTML help format, from specific HP Change Control Management application windows, by clicking in the window and pressing F1, or clicking the **Help** button

HP Change Control Management User's Guide explains how to use the HP Change Control Management application. This guide is accessible in the following formats, from the following locations:

- in PDF format on the HP Change Control Management CD-ROM
- in both PDF format and online HTML help format by selecting **Help** > **HP Change Control Management Documentation Library** from the HP Change Control Management application
- in HTML help format, from specific HP Change Control Management application windows, by clicking in the window and pressing F1, or clicking the **Help** button

HP Change Control Management API Reference explains how to work with HP Change Control Management's API. The API Reference is available in CHM format on the HP Change Control Management CD-ROM, or from the HP Change Control Management application by selecting **Help** > **HP Change Control Management Documentation Library**.

HP Change Control Management Readme provides information on what's new in the current version of the product as well as comprehensive information on known problems and limitations. The Readme is available in HTML format on the HP Change Control Management CD-ROM, or from the HP Change Control Management application by selecting **Help** > **HP Change Control Management Documentation Library**.

Note: Anything published in PDF format can be read and printed using Adobe Reader, which can be downloaded from the Adobe Web site (http://www.adobe.com).

Additional Online Resources

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Typographical Conventions

This guide uses the following typographical conventions:

UI Elements and **Function Names**	This style indicates the names of interface elements on which you perform actions, file names or paths, and other items that require emphasis. For example, "Click the **Save** button." It also indicates method or function names. For example, "The **wait_window** statement has the following parameters:"
Arguments	This style indicates method, property, or function arguments and book titles. For example, "Refer to the *HP User's Guide*."
<**Replace Value**>	Angle brackets enclose a part of a file path or URL address that should be replaced with an actual value. For example, <**MyProduct installation folder**>**bin**.
Example	This style is used for examples and text that is to be typed literally. For example, "Type Hello in the edit box."
CTRL+C	This style indicates keyboard keys. For example, "Press ENTER."
[ ]	Square brackets enclose optional arguments.
{ }	Curly brackets indicate that one of the enclosed values must be assigned to the current argument.
...	In a line of syntax, an ellipsis indicates that more items of the same format may be included. In a programming example, an ellipsis is used to indicate lines of a program that were intentionally omitted.
|	A vertical bar indicates that one of the options separated by the bar should be selected.

1

Introduction to HP Change Control Management

This chapter provides an overview of HP Change Control Management, describing the various sections of the application. It also includes information on how to access HP Change Control Management.

Note: In this book, the HP Change Control Management application is referred to as HP Change Control Management.

Overview of HP Change Control Management

HP Change Control Management, which supports the change management process by consolidating requests for change from various sources, enables you to view a calculation of the risk involved in the implementation of each change, gain insight into the potential impact of each change, and identify collisions between concurrently scheduled changes. Based on this information, you can evaluate the way in which to proceed with each planned change.

In addition, HP Change Control Management's collaboration feature enables you to conduct virtual discussions about a planned change, create action items from the change, and, ultimately, approve or reject the change. As a result, the Change Advisory Board's actual meeting time can be significantly minimized, with most of the issues having been previously resolved virtually, via HP Change Control Management.

HP Change Control Management contains the following modules:

- **Dashboard.** Designed for IT managers, this module displays change request data in real time, using graphical displays. For details on this module, see Chapter 2, "Working with the Dashboard."
- **Change Analysis.** This module is divided horizontally into two panes. The upper pane displays a view of change requests that were processed by HP Change Control Management or action items that were created from change requests, depending on whether you are in the Change Requests or Action Items mode. The lower pane displays change request details and analysis information for each selected change request, or for the change request associated with each selected action item.

  In addition, the Change Analysis module provides both a change request and action item filter mechanism. For details on this module, see Chapter 3, "The Change Analysis Module at a Glance."

- **Administration.** (viewed by the administrator only). Enables the administrator to define and edit user properties, view details of the IT applications affected by processed change requests, assign importance levels to these applications and associate specific users with them, configure change request fields, define risk factors, and configure time period settings. For details on this module, refer to the *HP Change Control Management Installation and Configuration Guide*.

  You can view and configure user properties for the current HP Change Control Management user, select the applications you want to associate with the current user, and define current user preferences in the User Settings dialog box. To access this dialog box, select **Preferences** > **User Settings**. For details, see Chapter 8, "Configuring User Settings."

Note: The time zone of the user's machine is displayed to the right of the three module tabs.

Accessing HP Change Control Management

You access HP Change Control Management using a Web browser, from any computer with a network connection (intranet or Internet) to the HP Change Control Management server. For details on Web browser requirements, refer to the *HP Change Control Management Installation and Configuration Guide*.

To access the HP Change Control Management login page and log in to HP Change Control Management:

1. Configure the user authentication mode, as described in the *HP Change Control Management Installation and Configuration Guide*.
2. In the Web browser, enter the URL http://<server_name>:<Tomcat server port>/ccm if you are not working with an identity management system, or http://<server_name>/ccm if you are working with an identity management system, where **server_name** is the name or IP address of the HP Change Control Management server.

3 Enter the login parameters (user name and password) of a user defined by the administrator and assigned to you, and click **Log In**. After logging in, the user name appears in the top right-hand corner of the screen.

To log out of HP Change Control Management:

When you have completed your session, click **Logout** at the top right of the screen.

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Working with the Dashboard

This chapter describes how to work with the HP Change Control Management Dashboard, which displays change request data in real time, using graphical displays.

Note: This chapter describes the Dashboard features available to the regular user. If you are an administrator, contact customer support for assistance in working with the additional Dashboard features available to you.

Viewing the Default Portlets

When you click the Dashboard tab, the Change Control Management Default Page opens, displaying the following four portlets:

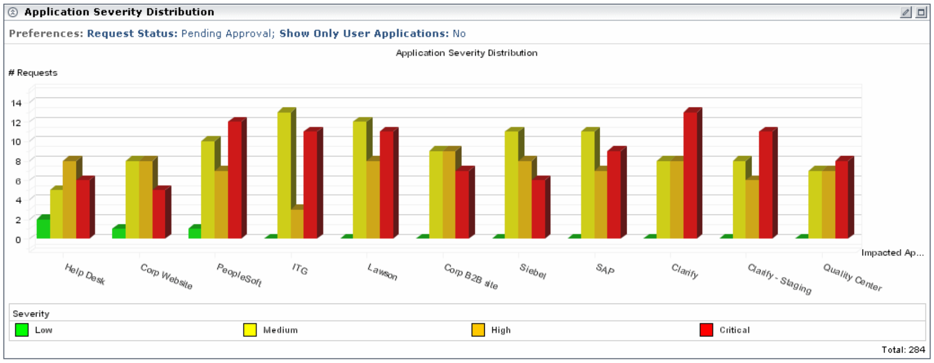
- Application Severity Distribution – for details, see page 19
- Application Status Distribution – for details, see page 21
- Change Request Impact Analysis Ratio – for details, see page 23
- New and Closed Change Requests Over Time – for details, see page 25

Note:

- If you are the first user logging on to the application after the server was started, the Dashboard may take a few minutes to load. The next time you enter the Dashboard, it will load immediately.
- The Change Control Management Default Page cannot be edited or personalized. To personalize or edit the preferences on this page, you must copy this page to your list of personal Dashboard pages (if copying is enabled by the administrator, which it is not by default).
- If you copied the Change Control Management Default Page and the administrator required a preference to be defined before displaying one of the portlets on the page, you must define a preference for this portlet in order to view it.
- Even if you copied the Change Control Management Default Page and can, in general, edit the preferences on this page, you will not be able to edit a portlet preference that the administrator preconfigured.

Application Severity Distribution

The Application Severity Distribution portlet displays the number of change requests at each severity level, per application, for the request status selected by the user.



For example, the above graph shows that the Help Desk application has:

- 2 Pending Approval change requests with a severity level of **Low**
- 5 Pending Approval change requests with a severity level of **Medium**
- 8 Pending Approval change requests with a severity level of **High**
- 6 Pending Approval change requests with a severity level of **Critical**

To modify the display preferences (possible only after the page has been copied):

1 Click the **Edit** button. The Edit Preferences page opens, displaying the following options:

- **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Application Severity Distribution portlet.
- **Show Only User Applications.** You can modify the default option whereby data is displayed only for those applications associated with the current user. (You associate applications with the current user in the User Settings dialog box. For details, see "Associating Applications with the Current User" on page 131.) To display data for all IT applications affected by the change requests that HP Change Control Management processes, select **No** under **Show Only User Applications**.
- **Request Status.** You can modify the default option whereby data is displayed only for requests with the status **Pending Approval**. To display data for requests with a different status, select the required status from the **Request Status** selection box.
- **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.

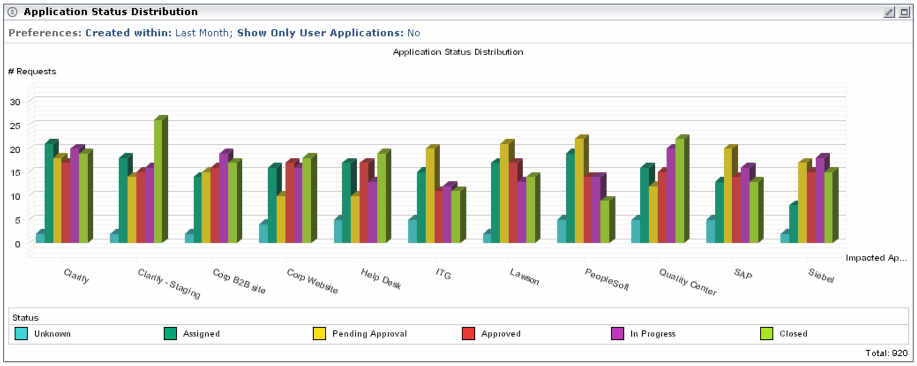
2 Click **Done** to save your preference settings and return to the default Dashboard page.

To maximize the Application Severity Distribution portlet:

Click the **Maximize** button. A magnified view of the Application Severity Distribution portlet is displayed on a page by itself. To return to the original view, click **Back**.

Application Status Distribution

The Application Status Distribution portlet displays the number of change requests for each request status level, per application, that were created within the time frame selected by the user.



For example, the above graph shows that the following change requests affecting the Help Desk application were created during the last month:

- 5 change requests with a current status level of **Unknown**
- 17 change requests with a current status level of **Assigned**
- 10 change requests with a current status level of **Pending Approval**
- 17 change requests with a current status level of **Approved**
- 13 change requests with a current status level of **In Progress**
- 19 change requests with a current status level of **Closed**

To modify the display preferences (possible only after the page has been copied):

1 Click the **Edit** button. The Edit Preferences page opens, displaying the following options:

- **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Application Status Distribution portlet.
- **Created Within.** You can choose to display data for change requests that were created within a time frame other than the default one, **Last Month**. To display data for change requests created within a different time frame, select **Last Week** or **Last Two Weeks** from the **Created Within** selection box.
- **Show Only User Applications.** You can modify the default option whereby data is displayed only for those applications associated with the current user. (You associate applications with the current user in the User Settings dialog box. For details, see “Associating Applications with the Current User” on page 131.) To display data for all IT applications affected by the change requests that HP Change Control Management processes, select **No** under **Show Only User Applications**.
- **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.

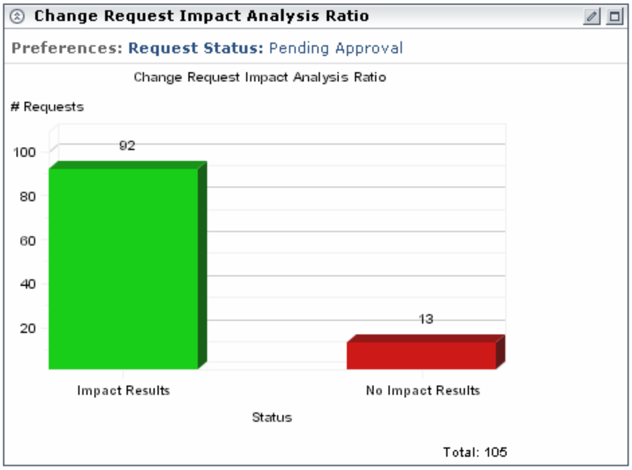
2 Click **Done** to save your preference settings and return to the default Dashboard page.

To maximize the Application Status Distribution portlet:

Click the **Maximize** button. A magnified view of the Application Status Distribution portlet is displayed on a page by itself. To return to the original view, click **Back**.

Change Request Impact Analysis Ratio

The Change Request Impact Analysis Ratio portlet displays both the number of change requests for which impact analysis results were available as well as the number of change requests for which impact analysis results were not available, for the request status selected by the user.



For example, the above graph shows the following:

- Impact analysis results were available for 92 Pending Approval change requests.
- Impact analysis results were unavailable for 13 Pending Approval change requests.

To modify the display preferences (possible only after the page has been copied):

1 Click the **Edit** button. The Edit Preferences page opens, displaying the following options:

➤ **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Change Request Impact Analysis Ratio portlet.

➤ **Request Status.** You can modify the default option whereby data is displayed only for requests with the status **Pending Approval**. To display data for requests with a different status, select the required status from the **Request Status** selection box.

➤ **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.

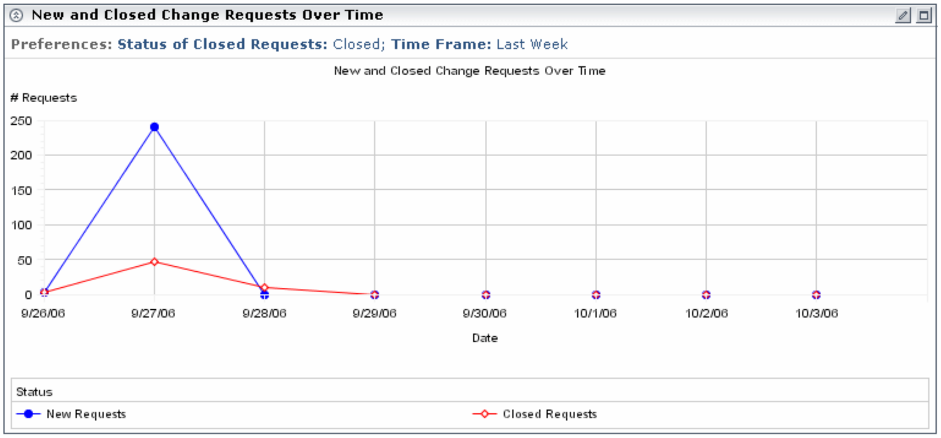
2 Click **Done** to save your preference settings and return to the default Dashboard page.

To maximize the Change Request Impact Analysis Ratio portlet:

Click the **Maximize** button. A magnified view of the Change Request Impact Analysis Ratio portlet is displayed on a page by itself. To return to the original view, click **Back**.

New and Closed Change Requests Over Time

The New and Closed Change Requests Over Time portlet displays the number of change requests with the request status of "New" as well as the number of change requests with the request status of "Closed" (or the status equated with that of "Closed") during the time frame selected by the user.



For example, the above graph shows the following:

- There were between 3 and 241 **New** change requests from the 26th until the 27th of September, and between 241 and 0 **New** change requests from the 27th until the 28th of September.
- There were 3 to 35 **Closed** change requests on any given day between the 26th and the 29th of September.

To modify the display preferences (possible only after the page has been copied):

1. Click the **Edit** button. The Edit Preferences page opens, displaying the following options:

   ➤ **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the New and Closed Change Requests Over Time portlet.

   ➤ **Time Frame.** You can choose to display data for change requests within a time frame other than the default one, **Last Week**. To display data for change requests within a different time frame, select **Last Two Weeks** or **Last Month** from the **Time Frame** selection box.

   ➤ **Status of Closed Requests.** HP Change Control Management enables the customization of the request status field. It is therefore possible that your service desk application uses a status other than **Closed** to refer to closed requests. To display requests of this status as **Closed** requests in the New and Closed Change Requests Over Time portlet, enter this status for the **Status of Closed Requests** preference. For example, if you mark **Closed** change requests as **Completed** in your service desk application, you would enter **Completed** here.

   ➤ **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.

2. Click **Done** to save your preference settings and return to the default Dashboard page.

To maximize the New and Closed Change Requests Over Time portlet:

Click the **Maximize** button. A magnified view of the New and Closed Change Requests Over Time portlet is displayed on a page by itself. To return to the original view, click **Back**.

Working with Dashboard Pages

The following buttons are available at the top of a Dashboard page:

Button	Description
	Enables you to view the comments that the administrator entered for the current module (available only if the page is public and is part of a module defined by the administrator).
	Enables you to determine the refresh rate for the current page.
	Enables you to create a PDF containing the data on the current page.
	Enables you to open the Personalize screen and personalize the Dashboard. For details, see "Personalizing the Dashboard" below.

If the page is a public page and the administrator has configured access to the page for a number of users, the words **Shared Page** appear in the top right-hand corner of the page.

Personalizing the Dashboard

You can personalize the Dashboard by adding groups and pages within these groups, choosing the portlets to be displayed on each page, and specifying the positions of the portlets on the page.

You personalize groups, pages, and portlets in the Personalize screen, which you can access by clicking the **Personalize** button in the top right-hand corner of the current page, or the **Personalize** tab in the top menu.

This section describes:

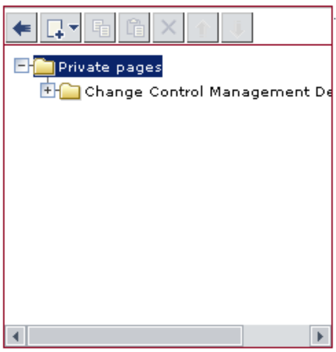
- “Adding Groups” below
- “Adding Pages” on page 29
- “Copying Pages” on page 30
- “Modifying Pages” on page 30
- “Adding Portlets” on page 31
- “Managing Portlets” on page 32

Adding Groups

You can add groups under which you can place pages. This enables you to categorize your personal pages.

To add a group:

1 In the Personalize screen, select **Private pages** in the Dashboard page tree.



2 Click the **Add** button and select **New Group**. A new group is added to the Dashboard page tree.

3 In the Edit Group pane on the right, enter a name for the new group and a brief description of the group. The new group is renamed in the Dashboard page tree.

Adding Pages

You can add new blank pages either to the groups that you created or directly to the Dashboard page tree. You then populate these pages with portlets.

If you have been assigned the necessary privileges, you can also add preconfigured pages (also referred to as modules). Preconfigured pages are sets of pages containing portlets that the administrator has already created.

To add a new page to the Dashboard page tree:

1. In the Personalize screen's Dashboard page tree, select **Private pages** or the specific group to which you want to add a page.

2. Click the **Add** button and select **New Page**. A new page is added to the Dashboard page tree.
3. In the Edit Page pane on the right, enter a name for the new page. The new page is renamed in the Dashboard page tree.
4. Specify how often you want the data on the page to be refreshed by selecting the **Automatically refresh this page every X minutes** check box and entering the refresh rate. By default, the Dashboard does not refresh pages.

After creating the page, you can populate it with portlets. For more information, see "Adding Portlets" on page 31.

To add a preconfigured page to the Dashboard page tree:

1. In the Personalize screen's Dashboard page tree, select **Private pages**.

2. Click the **Add** button and select **Add Preconfigured Pages**. The Add Preconfigured Pages dialog box is displayed in the right pane.
3. Select the check box to the left of the module(s) whose pages you want to add to the Dashboard page tree. Each module you select is added as a group in the tree. The module's pages appear under the group created for the module.

Copying Pages

You can copy pages from one group to another in the Dashboard page tree. In addition, if you have been assigned the necessary privileges, you can copy a shared module (containing several pages) or page to the list of your personal Dashboard pages.

To copy a module or page:

1 Select the module or page you want to copy (either in the Dashboard page tree or under **Share pages**) and click the **Copy** button.

2 In the Dashboard page tree, select **Private pages** or the group under which you want to place the copied module or page, and click the **Paste** button. The module or page is copied to the selected location.

Modifying Pages

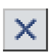
You can change the order of the Dashboard pages in the **Switch to page** list. You can also rename and remove pages, and modify the refresh rate of a page.

To modify a page:

1 Access the Personalize screen.

➤ To change the position of a page in the **Switch to page** list, change the position of the page in the Dashboard page tree by clicking the **Up** and **Down** buttons.

➤ To rename a page, select the page in the Dashboard page tree and enter a new name in the Edit Page pane's **Page Name** box.



➤ To remove a page from the Dashboard, select the page in the Dashboard page tree and click the **Delete** button. Click **Yes** to confirm deletion.

➤ To modify the refresh rate of a page, select the page in the Dashboard page tree, then select the **Automatically refresh this page every X minutes** check box and specify a new refresh rate in the Edit Page pane.

➤ To add portlets to a page, see "Adding Portlets" on page 31.

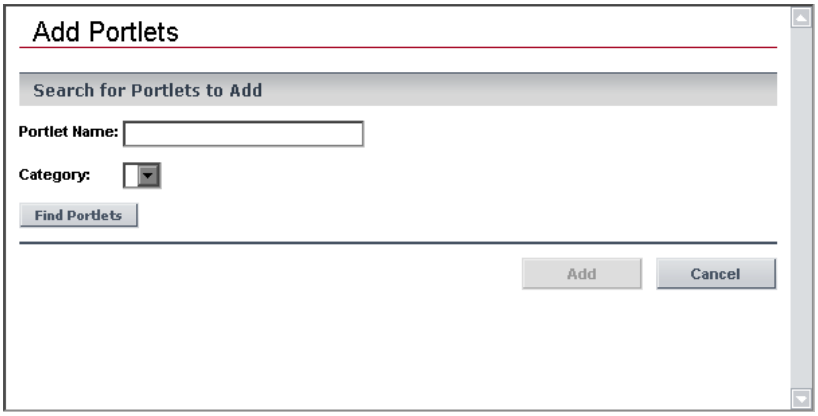
➤ To modify how portlets are displayed on a page, see "Managing Portlets" on page 32.

Adding Portlets

You can add portlets to a selected page. Note that to optimize the time that it takes to load a page and make the page easy to view, it is recommended that you limit the number of portlets on a page to six.

To add a portlet to a page:

1 In the Personalize screen's Dashboard page tree, select the page to which you want to add portlets and click **Add Portlets** in the Edit Page pane. The Add Portlets window opens.



2 In the **Portlet Name** box, enter the name of the portlet you want to add to the page.

3 From the **Category** box, select the category to which the portlet belongs if the administrator has defined portlet categories.

4 Click **Add**.

Alternatively, click **Find Portlets** to display a list of available portlets, select the portlets that you want to add to the page, and click **Add**.

The portlets you specified are added to the page in both the Edit Page pane and the Dashboard page tree.

To rearrange the order in which the portlets are displayed, or to move or remove portlets from a page, see "Managing Portlets" on page 32.

Managing Portlets

This section describes the following Dashboard functionality:

- Arranging Portlets on a Page – for details, see below
- Copying Portlets to Other Pages – for details, see below
- Renaming Portlets – for details, see page 33
- Removing Portlets from Pages – for details, see page 33

Arranging Portlets on a Page

You can determine the layout of the portlets on each of the Dashboard pages.

To arrange the portlets on a page:

1. In the Edit Page pane, select the portlet you want to move. Selecting the portlet causes it to be highlighted on the page.
2. Drag the portlet to its new position.

For each portlet you want to move, repeat steps 1 and 2.

The portlets appear in their new positions in the Edit Page pane and Dashboard page tree.

Copying Portlets to Other Pages

You can copy an existing portlet from one personal page to another. You can also copy a shared portlet to a personal page if you have been assigned the necessary privileges by the administrator.

Note: To optimize the time that it takes to load a page and make the page easy to view, it is recommended that you limit the number of portlets on a page to six.

To copy a portlet to another page:

1. Select the portlet that you want to copy and click the **Copy** button.

2 Select a page in the Dashboard page tree and click the **Paste** button. The portlet is copied to the selected page.

Note: The new portlet's name is the original portlet's name preceded by **Copy of**. To rename the copied portlet, see "Renaming Portlets" below.

Renaming Portlets

Renaming a portlet is useful when the same portlet is duplicated with different preferences in each copy.

To rename a portlet:

1 In the Edit Page pane, select the portlet that you want to rename and click the **Edit Portlet Preferences** button. The Edit Preferences: <name of portlet> pane is displayed.

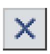
2 Click **Change Title**. The Change Portlet Title window opens.

3 Enter the new name (with a maximum of 30 characters) in the **Title** box and click **Change**. The new portlet title is displayed in the Edit Page pane and Dashboard page tree.

Removing Portlets from Pages

You can remove a portlet from a Dashboard page. Note that this does not affect other occurrences of the portlet on other Dashboard pages.

To remove a portlet from a page:



1 In the Dashboard page tree, select the portlet that you want to remove and click the **Delete** button. Alternatively, in the Edit Page pane, select the portlet that you want to remove, and click the **Remove Portlet From Page** button .

2 Click **Yes** to confirm deletion. The portlet is removed from the Edit Page pane and Dashboard page tree.

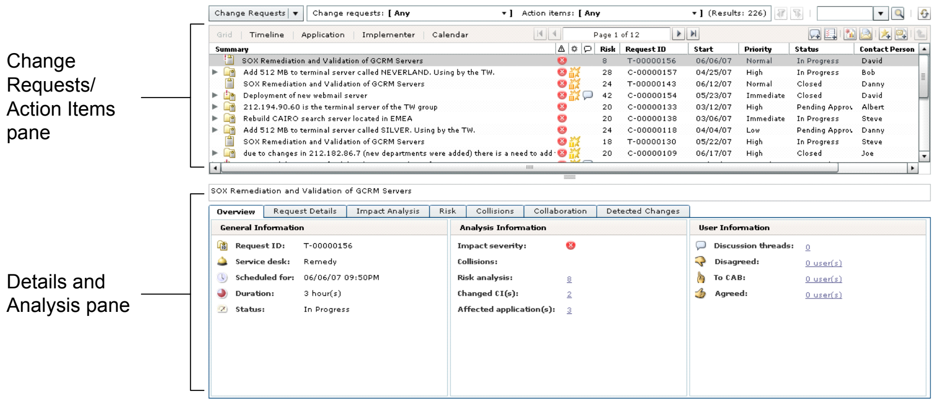
3

The Change Analysis Module at a Glance

This chapter introduces the key elements in the Change Analysis module.

Understanding the Change Analysis Module

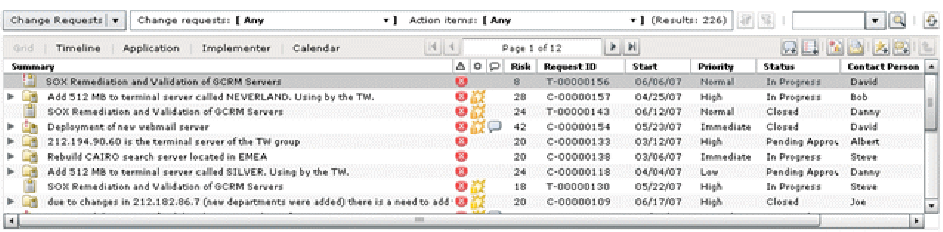
The Change Analysis module is divided horizontally into two panes. The upper pane displays a grid of change requests or action items, depending on the mode that you select. The lower pane displays change request details and analysis information.



Change Requests/Action Items Pane

You use the selection box in the top left-hand corner of the Change Analysis module to toggle between the following two modes in the upper pane of the module:

➤ **Change Requests mode.** Displays change requests that have been processed by HP Change Control Management. You can analyze the change requests from a number of different perspectives by selecting one of the following available views: **Grid**, **Timeline**, **Application**, **Implementer**, or **Calendar**.

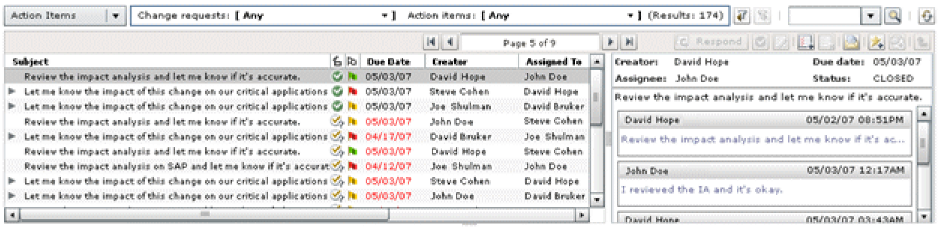


For detailed information on each of these views, see Chapter 4, “Working in the Change Requests Mode.”

For information on using the filter mechanism to display only those change requests that meet certain criteria, see Chapter 6, “Filtering Change Requests and Action Items.”

For an explanation of the Change Requests mode toolbar, see “Working with the Change Requests Toolbar” on page 39.

➤ **Action Items mode.** Displays action items that have been created from change requests. The left-hand section displays a grid view of the action items and the right-hand section displays basic information and user comments for each action item selected from the grid.



For detailed information on the Action Items mode, see Chapter 5, “Working in the Action Items Mode.”

For information on using the filter mechanism to display only those action items that meet certain criteria, see Chapter 6, “Filtering Change Requests and Action Items.”

For an explanation of the Action Items mode toolbar, see “Working with the Action Items Toolbar” on page 41.

Note: You can refresh the change requests displayed in the Change Requests mode or the action items displayed in the Action Items mode by clicking the **Refresh** button.

Details and Analysis Pane

The Details and Analysis pane displays the same information for the Change Requests and Action Items modes. If you are working with the Change Requests mode, the Details and Analysis pane displays information for each selected change request. If you are working with the Action Items mode, the Details and Analysis pane displays information for the change request associated with each selected action item.

The Details and Analysis pane contains the following tabs:

- **Overview.** Provides a general summary of the information pertaining to the selected or associated change request.
- **Request Details.** Displays the change request details that originate from the service desk application.
- **Impact Analysis.** Displays the applications and configuration items (CIs) that will be affected by the change request.
- **Risk.** Displays the risk analysis for the selected or associated change request, using both numerical and graphical data.
- **Collisions.** Displays the change requests that collide with the selected or associated change request.
- **Collaboration.** Displays the discussion threads pertaining to the selected or associated change request, the action items associated with the request, and the history of all the approvals and/or retractions of the request in HP Change Control Management. In addition, you can use the Approval view in this tab to approve or retract a request, depending on the status of the request, if you have been granted Approver status in HP Change Control Management.
- **Detected Changes.** Displays all the detected changes that match the selected or associated change request.

For detailed information on the above tabs, see Chapter 7, “Working with the Details and Analysis Pane.”

Working with the Change Requests Toolbar

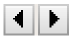
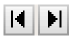
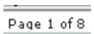
The Change Requests mode toolbar contains the following buttons:

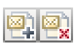
Icon	Name	Description
	Previous and Next arrows	Used to navigate between pages of change requests.
	First and Last Page arrows	Used to jump to the first or last page of change requests.
Page 1 of 8	**Page box**	Used to jump to a specific page of change requests. You do so by highlighting the text in the **Page** box, typing the page number, and pressing ENTER. If you type a page that is not within the available page range, the **Page** box is outlined in red and you are required to retype a page number that falls within the correct range.
	Zoom In/ Zoom Out	Used to open a time period selection box in which you select a time period on which to focus. Appears only in the Timeline, Application, and Implementer views.
	Select Time Period	Used to select the configured time periods to display in the ground of the Timeline, Application, Implementer, and Calendar views. Does not appear in the Grid view.
	New Discussion Thread	Opens the New Discussion Thread dialog box, which is used to add a new thread to the discussion in the Collaboration tab's Discussion view. For more information, see "Viewing and Adding Discussion Threads and Comments" on page 121.
	New Action Item	Opens the Add Action Item dialog box, which is used to create an action item associated with the request. For more information, see "Creating an Action Item" on page 67.

Icon	Name	Description
	**Generate Report**	Opens the Report Details dialog box, which is used to generate a PDF or an HTML report. For more information, see "Generating Reports in the Grid and Calendar Views" on page 59. Appears only in the Grid and Calendar views.
	**Send E-Mail**	Used to send a change request by e-mail. To send a change request by e-mail, select the change request that you want to send and click the **Send E-Mail** button. In the Send E-Mail dialog box, enter the e-mail address of each recipient of the e-mail, enter any additional comments you have on the change request, and click the **Send** button.
	**Add Selected Request to Favorites/ Remove Selected Request from Favorites**	Used to add or remove the selected change request from a predefined filter of favorite change requests and action items. You can also subscribe to receive notifications when certain modifications are made to favorite items and requests. For details, see "Configuring Current User Preferences" on page 133.
	**Subscribe to Selected Request/ Unsubscribe from Selected Request**	Used to receive e-mail notifications or cancel a notification subscription for the selected change request. For information on configuring notification rules and conditions, refer to the *HP Change Control Management Installation and Configuration Guide*.
	**Go to Parent Request**	Displays the parent change request for the selected child change request (task). Appears only in the Grid view.

Working with the Action Items Toolbar

The Action Items mode toolbar contains the following buttons:

Icon	Name	Description
	**Previous and Next arrows**	Used to navigate between pages of action items.
	**First and Last Page arrows**	Used to jump to the first or last page of action items.
	**Page box**	Used to jump to a specific page of action items. You do so by highlighting the text in the **Page** box, typing the page number, and pressing ENTER. If you type a page that is not within the available page range, the **Page** box is outlined in red and you are required to retype a page number that falls within the correct range.
	**Respond**	Opens the Respond dialog box, which enables the following: ➤ any user to post comments ➤ the assignee to mark an open action item as **Done** or return the item to its creator ➤ the creator to reopen an action item marked as **Done** For more information, see “Working with Action Items” on page 67.
	**Mark as Closed**	Enables the creator to change the status of the action item to **Closed**.
	**Edit Action Item**	Opens the Edit Action Item dialog box, enabling the creator to edit an open action item. For more information, see “Editing an Action Item” on page 69.

Icon	Name	Description
	**New Action Item**	Opens the Add Action Item dialog box, which is used to create a new action item associated with the same change request as the selected action item. For more information, see "Creating an Action Item" on page 67.
	**Delete Action Item**	Enables the creator to delete an action item. To delete an action item, select the item and click the **Delete Action Item** button. Click **Yes** in the deletion confirmation dialog box.
	**Forward by E-Mail (FYI)**	Used to send an action item by e-mail, for information purposes. To send an action item by e-mail, select the action item that you want to send and click the **Send E-Mail** button. In the Send E-Mail dialog box, enter the e-mail address of each recipient of the e-mail, enter any additional comments you have on the action item, and click the **Send** button.
	**Add Selected Action Item to Favorites/ Remove Selected Action Item from Favorites**	Used to add or remove the selected action item from a predefined filter of favorite action items and change requests. You can also subscribe to receive notifications when certain modifications are made to favorite items and requests. For details, see "Configuring Current User Preferences" on page 133.
	**Subscribe to Selected Action Item/ Unsubscribe from Selected Action Item**	Used to receive e-mail notifications or cancel a notification subscription for the selected action item. For information on configuring notification rules and conditions, refer to the *HP Change Control Management Installation and Configuration Guide*.
	**Go to Parent Action Item**	Displays the parent action item for the selected derived action item.

4

Working in the Change Requests Mode

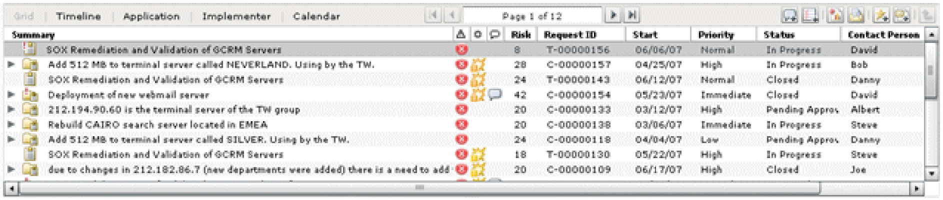
This chapter describes the Change Analysis module's Change Requests mode, which displays the change requests that have been processed by HP Change Control Management. The Change Requests mode contains a number of views, enabling you to analyze the change requests from several different perspectives.

Note: You can filter the change requests displayed in the Change Requests mode. For more information, see Chapter 6, "Filtering Change Requests and Action Items."

By default, HP Change Control Management displays all the change requests in the system. When a filter is in place, it filters the change requests in all of the different views.

Viewing Change Requests in a Grid

The Change Requests mode's Grid view displays change requests in the form of a sortable table. You can sort the order of appearance of the requests according to each column by clicking the appropriate column heading.



Parent requests (for example, changes) can be expanded to display all the child requests (for example, tasks). To expand or collapse parent requests, click the **Expand** button next to the request.

When you select a change request in the grid, details and analysis information for the selected change request are displayed in the Details and Analysis pane.

Note: By default, the Grid view displays data for 20 change requests. To reconfigure this number, see "Configuring Current User Preferences" on page 133.

Grid View Columns

Unless otherwise customized by the administrator, the Grid view includes the following columns:

Column	Description
Summary	Displays a brief overview of the change request. The icon next to the overview sentence indicates the following: ➤ the type of change request—that is, one of the following: **level 1** (by default, **change**) **level 2** (by default, **task**) **latent.** Indicates that the change request was detected by HP Change Control Management. A tooltip indicating the request type is visible when you hold your mouse over this icon. ➤ whether the request is scheduled to take place outside a Changes Allowed period or within a Changes Not Allowed period pertaining to the request. If so, a red exclamation point is included in the icon . A tooltip indicating that the change or task is abnormal and listing the time period category with whose rules the request does not comply is visible when you hold your mouse over this icon. **Note:** The HP Change Control Management administrator configures time period categories and rules that apply to these categories. The administrator can also configure the names of the change request types to reflect the terminology used in your integrated service desk application. For more information, refer to the *HP Change Control Management Installation and Configuration Guide*.
Impact Severity	Displays an icon indicating the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the request.

Column	Description
Impact Severity (cont'd)	Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels: Critical High Medium Low Very low No impact analysis available A tooltip indicating the impact severity level of the change request is visible when you hold your mouse over the severity level icon. For more information about impact analysis and how impact severity is calculated, see "Viewing Impact Analysis Results" on page 100.
Collision Severity	Displays an icon indicating the collision severity level of the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed. Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels: Critical High Medium Low Very Low If there are no collisions with the change request, no collision severity icon is displayed.

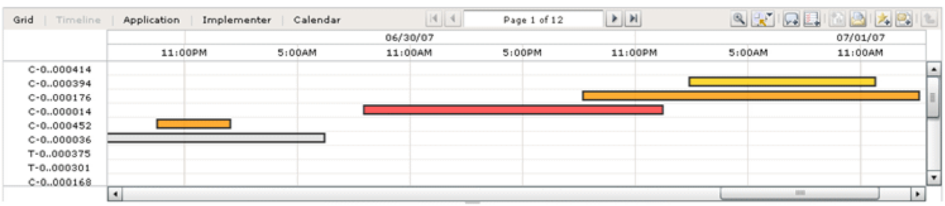
Column	Description
Collision Severity (cont'd)	A tooltip indicating the severity level of the collision is visible when you hold your mouse over the collision severity icon. For more information about collisions and how collision severity is calculated, see "Viewing Change Request Collisions" on page 110.
User Discussion Threads & Posts	The presence of a user discussion threads & posts icon indicates that user discussion threads and comments to these threads exist in response to the selected change request. A tooltip indicating how many discussion threads and comments exist is visible when you hold your mouse over this icon. You can view the discussion threads themselves in the Collaboration tab's Discussion view. For more information, see "Viewing and Adding Discussion Threads and Comments" on page 121.
Risk	Displays a number from 0-100 that indicates the risk level of the selected change request relative to the other change requests. A higher number indicates a higher risk level. HP Change Control Management calculates this figure based on risk factors that are subjectively weighted by the HP Change Control Management administrator during the configuration process. For more information about how the risk level is calculated, see "Viewing Change Request Risk Analysis" on page 103.
Request ID	Displays the reference ID number of the change request in the service desk application.
Start	Displays the date on which the change request is scheduled to begin.
Priority	Displays the HP Change Control Management priority level of the change request. When you configure HP Change Control Management, you configure the priority levels that can be assigned to a change request.

Column	Description
Status	Displays the HP Change Control Management status of the change request. When you configure HP Change Control Management, you configure the statuses that can be assigned to a change request.
Contact Person	Displays the name of the user responsible for the change request.

Note: You can customize the Grid view to display different information. For details on customizing the Grid view columns, refer to the *HP Change Control Management Installation and Configuration Guide*.

Viewing Change Requests on a Timeline

The Change Requests mode's Timeline view displays change requests as blocks of time on a timeline. Each change request is displayed on a separate row. The Timeline view resembles a typical Gantt chart, allowing you to view overlapping change requests.



When you hold your mouse over a change request block, a tooltip displays detailed information about the change request. When you select a change request block, details and analysis information for the selected change request are displayed in the Details and Analysis pane.

Note: The Timeline view is synchronized with the Grid view. The order of appearance of change requests and the number of change requests per page are the same for both views.

Viewing Impact Severity Levels

The color of the block indicates the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the change request.

By default, the following colors indicate the following impact severity levels:

Color	Impact Severity Level
Red	Critical
Orange	High
Yellow	Medium
Khaki	Low
Olive Green	Very Low
Gray	No impact analysis available

Note: For more information about impact analysis and how impact severity is calculated, see "Viewing Impact Analysis Results" on page 100.

Viewing Time Period-Related Data

The color of the block frame indicates whether the change request is scheduled to be executed within one of the configured Changes Allowed periods pertaining to the request.

- A white frame indicates that the change request is scheduled to take place during one of the Changes Allowed periods that is configured for a time period category in which the selected change request is included.
- A black frame indicates that the change request is abnormal and falls either outside a Changes Allowed period or within a Changes Not Allowed period configured for a time period category in which the selected change request is included. The name of the time period category and the name of the recurrence rule that is breached are indicated in the change request's tooltip.

You can choose to display the time periods themselves in the background of the view, according to the category colors and time period patterns that were configured by the HP Change Control Management administrator. You do so by clicking the **Select Time Period** button and selecting the categories you want to view in the background.

Note: For more information on time periods and their configuration, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

Viewing Change Requests from Different Perspectives

The perspective views in the Change Requests mode display change requests aggregated by groups, allowing you to view change requests from different perspectives. The following perspective views are available:

- **Application view.** Aggregated by affected application. Change requests are displayed as blocks of time on a timeline and are grouped according to the affected applications. Each row is dedicated to the change requests for a single application. You can also view each of the associated change requests on separate rows.
- **Implementer view.** Aggregated by implementer. Change requests are displayed as blocks of time on a timeline and are grouped according to the implementer. Each row is dedicated to the change requests for a single implementer. You can also view each of the associated change requests on separate rows.

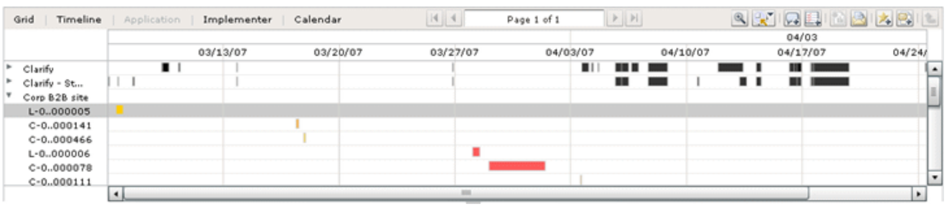
Note: The Application and Implementer views display only the applications/implementers that are included in the selected filter. For details on working with filters, see Chapter 6, "Filtering Change Requests and Action Items."

Working with the Application and Implementer Views

The Application and Implementer views share the same layout. Their common layout is described in this section. The following screen is an example of the Application view:

In the Application and Implementer views, each row is dedicated to the change requests for a single application or implementer. Change requests that overlap are indicated by a darker shade at the point at which they overlap.

You can display all of the change requests associated with a single application/implementer by clicking the arrow next to the application/implementer name.



Each change request associated with the selected application/implementer is displayed on a separate line. When you hold your mouse over a change request block, a tooltip displays detailed information about the change request. When you select a change request block, details and analysis information for the selected change request are displayed in the Details and Analysis pane.

Viewing Impact Severity Levels

The color of the block indicates the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the change request.

By default, the following colors indicate the following impact severity levels:

Color	Impact Severity Level
Red	Critical
Orange	High
Yellow	Medium
Khaki	Low
Olive Green	Very Low
Gray	No impact analysis available

Note: For more information about impact analysis and how impact severity is calculated, see "Viewing Impact Analysis Results" on page 100.

Viewing Time Period-Related Data

The color of the block frame indicates whether the change request is scheduled to be executed within one of the configured Changes Allowed periods pertaining to the request.

➤ A white frame indicates that the change request is scheduled to take place during one of the Changes Allowed periods that is configured for a time period category in which the selected change request is included.

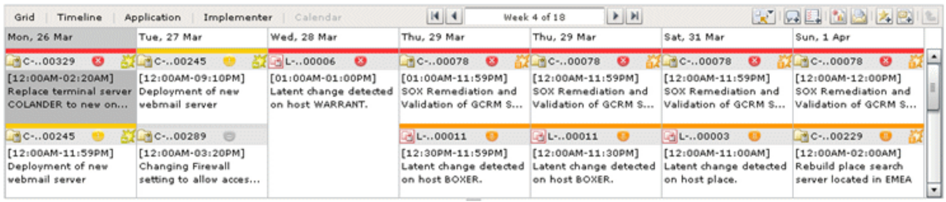
➤ A black frame indicates that the change request is abnormal and falls either outside a Changes Allowed period or within a Changes Not Allowed period configured for a time period category in which the selected change request is included. The name of the time period category and the name of the recurrence rule that is breached are indicated in the change request's tooltip.

You can choose to display the time periods themselves in the background of the view, according to the category colors and time period patterns that were configured by the HP Change Control Management administrator. You do so by clicking the **Select Time Period** button and selecting the categories you want to view in the background.

Note: For more information on time periods and their configuration, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

Viewing Change Requests in a Calendar

The Change Requests mode's Calendar view displays the change requests planned for each calendar day. A single page displays one calendar week. Each column represents a calendar day and each cell represents a single change request. Change requests appear in ascending order according to their scheduled start times.



Note:

➤ Change requests with no start or end times, or with start times later than their end times, will not appear in the Calendar view.

➤ The Calender view displays up to one hundred changes per calendar day. When a filter returns more than one hundred change requests per day, the Calendar view will display only the first hundred. To view all the change requests, either refine the filter or switch to the Grid or Timeline view.

➤ By default, the calendar week begins on Monday and ends on Sunday and the color of each cell header indicates the impact severity level of the change request. To reconfigure these settings, refer to the *HP Change Control Management Installation and Configuration Guide*.

The following icons are displayed in each cell:

Icon	Description
Request type	The request type icon indicates the following: ➤ the type of change request—that is, one of the following: **level 1** (by default, **change**) **level 2** (by default, **task**) **latent.** Indicates that the change request was detected by HP Change Control Management. A tooltip indicating the request type is visible when you hold your mouse over this icon. ➤ whether the request is scheduled to take place outside a Changes Allowed period or within a Changes Not Allowed period pertaining to the request. If so, a red exclamation point is included in the icon . A tooltip indicating that the change or task is abnormal and listing the time period category with whose rules the request does not comply is visible when you hold your mouse over this icon. **Note:** The HP Change Control Management administrator configures time period categories and rules that apply to these categories. The administrator can also configure the names of the change request types to reflect the terminology used in your integrated service desk application. For more information, refer to the *HP Change Control Management Installation and Configuration Guide*.

Icon	Description
Impact severity	Displays the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the request. Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels: Critical High Medium Low Very low No impact analysis available For more information about impact analysis and how impact severity is calculated, see “Viewing Impact Analysis Results” on page 100.

In addition, the following icons may also be displayed in a cell:

Icon	Description
Collision severity	Displays the collision severity level of the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed. Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels:  Critical  High  Medium  Low  Very Low For more information about collisions and how collision severity is calculated, see “Viewing Change Request Collisions” on page 110.
User Discussion Threads & Posts	The presence of a user discussion threads & posts icon indicates that user discussion threads and comments exist in response to the selected change request. You can view the discussion threads themselves in the Collaboration tab’s Discussion view. For more information, see “Viewing and Adding Discussion Threads and Comments” on page 121.

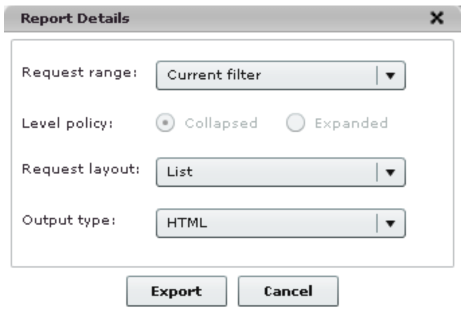
Note: You can choose to display the configured time periods in the Calendar view. You do so by clicking the **Show Time Periods** button and selecting the time period categories you want to view. The Calendar view displays these time periods alongside the dates on which they apply, using the **Changes Allowed** and **Changes Not Allowed** icons. When you mouse over an icon, the name of the category to which the time period belongs as well as the period’s start and end times are listed in the tooltip.

Generating Reports in the Grid and Calendar Views

In both the Grid and Calendar views, you can generate a PDF or an HTML report that contains data for a single change request, all the change requests displayed on the current page, or all the change requests included in the current filter.

To generate a report:

1 Select the change request, page, or filter for which you want to create a report and click the **Generate Report** button. The Report Details dialog box opens.



2 In the **Request range** box, select **Selected change request**, **Current page**, or **Current filter**, depending on the data you want to view in the report.

3 Under **Level policy**, select **Expanded** if you want to view data for child change requests (tasks). By default, the report will display data for parent change requests (changes) only.

4 In the **Request layout** box, choose one of the following options:

- **One page.** Displays the data for each change request on a separate page.
- **List.** Displays the data for each change request concisely, in a list format. Several lists are displayed on each page.

5. In the **Output type** box, choose whether you want the report to be generated as a PDF or as an HTML page.
6. Click **Export**. HP Change Control Management generates the report and displays it in a separate browser window.

Note: For information on customizing reports, contact customer support.

5

Working in the Action Items Mode

This chapter describes the Change Analysis module's Action Items mode, which displays action items that were created from change requests.

Note: By default, the Action Items mode displays all the action items that were created from all the change requests in the system. For information on filtering the action items displayed, see Chapter 6, "Filtering Change Requests and Action Items."

About Action Items

Action items are tasks that one user can send another regarding a specific change request. The user to whom the action item is assigned—known in HP Change Control Management as the assignee—can choose to perform the task assigned to him or return the action item to its creator. If the assignee chooses to perform the task, he informs the creator that the action item is done once the work has been completed. The creator of the action item then closes the item or reopens it, as required.

When the assignee receives an action item for whose completion he must involve other users, the assignee can create one or more derived action items from the action item he was assigned. However, these action items are not directly associated with the original action item and their statuses do not impact upon the status of the original action item. The status of the original action item does not change until the original item's assignee informs the creator that the item is done.

To monitor specific action items, you can add the items to your Favorites list. You can also subscribe to receive e-mail notifications when modifications are made to action items. In addition, you can forward an action item by e-mail to other users for them to review the item or comment on it.

Note:

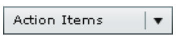
- A change request can have multiple action items associated with it, but an action item can be associated with only one change request.
- By default, HP Change Control Management automatically creates action items for certain change requests. For details, refer to the *HP Change Control Management Installation and Configuration Guide*.

Action items can be viewed in two places within the Change Analysis module:

- in the Action Items pane of the Action Items mode. You use the Action Items pane to view all the action items in your system, or those that meet certain filter criteria.
- in the Action Items view of the Collaboration tab. You use the Collaboration tab to view the action items associated with a specific change request.

This chapter describes the Action Items pane of the Action Items mode. For information on the Action Items view of the Collaboration tab, see “Viewing Action Items” on page 120.

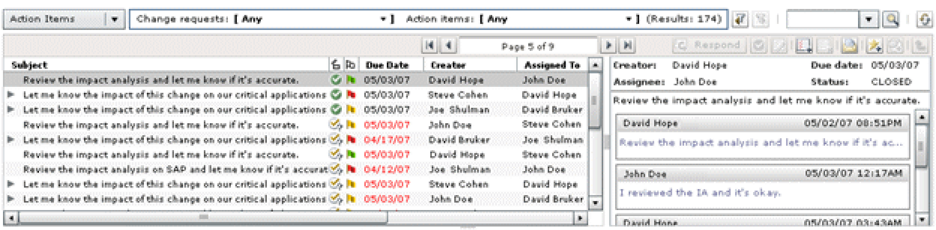
Viewing Action Items



You access the Action Items mode by selecting **Action Items** from the selection box in the top left-hand corner of the Change Analysis module.

The Action Items pane (upper pane) contains two sections:

- The left-hand section displays a grid view of the action items in the selected filter.
- The right-hand section displays detailed information for each action item selected from the grid.



Grid View

The left-hand section of the Action Items pane contains the following columns:

Column	Description
Subject	Displays a brief overview of the action item. Parent action items can be expanded to display all the derived action items. To expand or collapse action items, click the **Expand** button ▶ to the left of the item. Derived action items are displayed in purple.
Status	Displays an icon indicating the status of the action item. The following icons indicate the following statuses: Open Done Closed A tooltip indicating the status of the action item is visible when you hold your mouse over the action item icon.
Priority	Displays an icon indicating the priority level that the creator assigned to the action item. The following colors indicate the following priority levels: ➤ **Red** – High ➤ **Yellow** – Normal ➤ **Green** – Low A tooltip indicating the priority of the action item is visible when you hold your mouse over the action item icon.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Due Date</td><td>The day by which the creator determined that the action item must be completed. If this date has passed and the item has not been closed, the due date is displayed in red.

A tooltip indicating the due date (including the day and hour) of the action item is visible when you hold your mouse over the action item icon. If the due date has passed and the item has not been closed, [Expired] is also included in the tooltip.</td></tr>
<tr><td>Creator</td><td>Displays the name of the user who created the action item. The creator is also the user responsible for marking the action item as Closed.</td></tr>
<tr><td>Assigned To</td><td>Displays the name of the user to whom the action item was assigned. This user can respond to the request in one of the following ways:
➤ complete the task involved and mark the action item as Done once it has been completed
➤ reject the request and return it to the creator
If necessary, the assignee can also create a new, derived action item from the current action item. For details on all of the above actions, see “Working with Action Items” on page 67.</td></tr>
<tr><td>Pending On</td><td>Displays the name of the user whose action is being awaited. If the item is open, the name of the assignee, who is supposed to mark the item as Done, is displayed in this column (unless the assignee returned the item to the creator). If the item is marked as Done, the name of the creator, who is supposed to mark the item as Closed, is displayed in this column.</td></tr>
<tr><td>Modified</td><td>Displays the date (including the day and hour) on which the action item was last modified. If the item has not been modified since its creation, this column displays the item’s creation date and time.</td></tr>
<tr><td>ID</td><td>Displays the HP Change Control Management-generated ID number of the action item.</td></tr>
</table>

Note: You can sort the order of appearance of the requests according to each column by clicking the appropriate column heading.

Details View

The right-hand section of the Action Items pane contains the following information for each selected action item:

- **Creator.** Displays the name of the user who created the action item. If the action item is pending on the creator, a bullet appears to the right of the creator's name.
- **Assignee.** Displays the name of the user to whom the action item was assigned. If the action item is pending on the assignee, a bullet appears to the right of the assignee's name.
- **Due date.** The day by which the creator determined that the action item must be completed.
- **Status.** Displays the status—**Open**, **Done**, or **Closed**—of the action item.
- **Subject.** Displays the subject line of the action item (above the comments).
- **Comments.** Displays the comments that were posted regarding the action item. Each comment contains a header that includes the name of the user who posted the comment and the date and time of the comment's posting. The subject of the comment is displayed in blue text and the description entered by the user is displayed in black text.

Note: Comments can be posted by any HP Change Control Management user.

Working with Action Items

You use the buttons on the Action Items toolbar to add a new action item, edit an action item, add a comment to an item, return an item to its creator, and change an action item's status.

Note: This section describes only select buttons on the Action Items toolbar. For a full explanation of the toolbar, see "Working with the Action Items Toolbar" on page 41.

This section describes:

➤ "Creating an Action Item" below
➤ "Editing an Action Item" on page 69
➤ "Adding a Comment to an Action Item" on page 69
➤ "Returning an Action Item" on page 70
➤ "Changing an Action Item's Status" on page 71

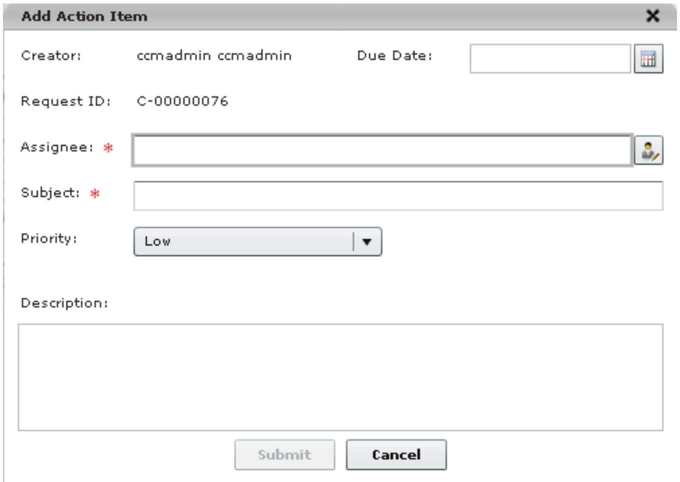
Creating an Action Item

You create an action item for a specific change request.

To create an action item:

1. If you are in the Action Items mode, select the action item for whose associated change request you want to create a new action item. If you are in the Change Requests mode, select the change request for which you want to create a new action item.

2 Click the **New Action Item** button. The Add Action Item dialog box opens.



3 Click the calendar icon to the right of the **Due date** box, select the date and time by which the action item should be completed, and click **OK**. The date appears in the **Due date** box.

Note: You select the time according to your machine's time zone, as indicated in the calendar box.

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4 Click the user selection icon to the right of the **Assignee** box, locate and select the user to whom you want to assign the action item, and click **OK**. The user name of the user you selected appears in the **Assignee** box.

5 In the **Subject** box, enter a brief overview of the action item.

6 In the **Priority** box, select the priority—**Low**, **Normal**, or **High**—you want to assign the action item.

7 If you selected an action item in step 1 and are the action item's assignee, choose whether you want to create the action item as a new item or as a derived action item. A derived action item is listed under the parent item in the Action Items pane.

8 In the **Description** box, enter a brief summary of the action item.

9 Click **Submit**. The action item is added to both the Action Items pane and the Action Items view of the associated change request's Collaboration tab. An e-mail notification is sent to the assignee.

Editing an Action Item

The creator of an action item can modify the assigned action item if it is still open.

To edit an action item:

1 In the Action Items pane, select the action item you want to modify and click the **Edit Action Item** button. The Edit Action Item dialog box opens.

2 Modify the due date, assignee, subject, priority, and/or description, as required. For details, see "Creating an Action Item" on page 67.

Note: You cannot modify the level (parent/derived) of the action item.

---

3 Click **Submit**. The action item properties are updated in both the Action Items pane and the Action Items view of the associated change request's Collaboration tab.

Adding a Comment to an Action Item

Any HP Change Control Management user can add a comment to any action item that is not closed.

To add a comment to an action item:

1 In the Action Items pane, select the action item to which you want to add a comment and click the **Respond** button. The Respond dialog box opens.

2 If you are the action item's creator or assignee, select **Respond with a post**.

3 In the **Subject** box, enter a brief overview of the comment you are adding.

4 In the **Description** box, enter the full text of your comment.

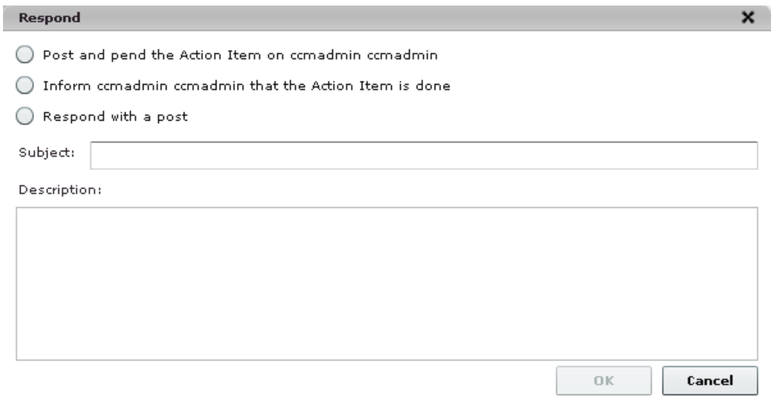
5 Click **OK**. When the action item is selected in either the Action Items pane or the Collaboration tab's Action Items view, the comment appears in the right-hand section of the screen.

Returning an Action Item

If you are assigned an action item and do not want to accept it, for any reason, you can return the item to its creator.

To return an action item:

1 In the Action Items pane, select the action item that you were assigned and click the **Respond** button. The Respond dialog box opens.



2 Select **Post and pend the action item on <creator>**. **Send it back to: <creator>** appears in the **Subject** box.

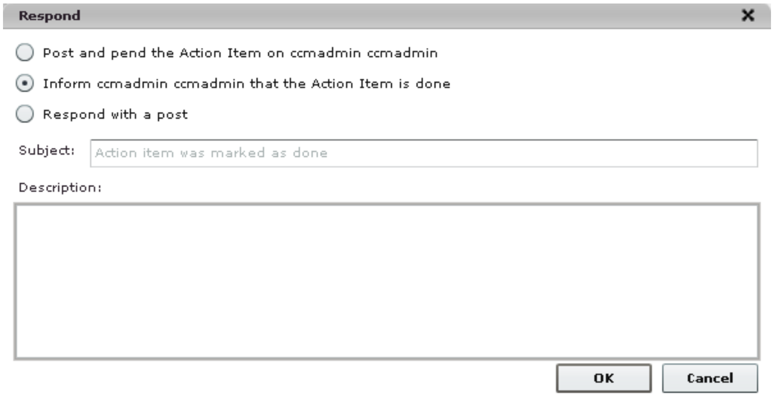
3 In the **Description** box, enter the reason why you do not want to accept the action item.

4 Click **OK**. Your action is now listed as a comment in both the Action Items pane and the Collaboration tab's Action Items view. The action item is now listed as pending on the creator.

Changing an Action Item's Status

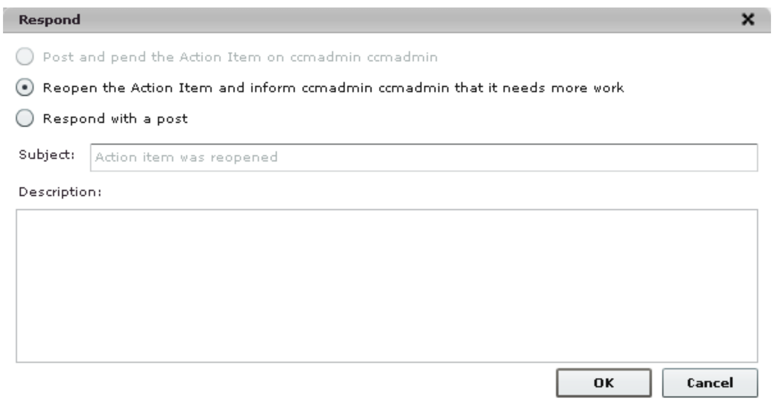
The following users can make the following status changes to an action item:

- The assignee can change the status of an action item from **Open** to **Done** by clicking the **Respond** button and selecting **Inform <creator> that the action item is done** in the Respond dialog box.



- The creator can change the status of an action item from **Open** or **Done** to **Closed** by clicking the **Mark as Closed** button.

- The creator can change the status of an action item from **Done** to **Reopen** by clicking the **Respond** button and selecting **Reopen the action item and inform <assignee> that it needs more work** in the Respond dialog box.



6

Filtering Change Requests and Action Items

This chapter describes how to filter the change requests displayed in the Change Requests mode and the action items displayed in the Action Items mode.

About Using Filters

You use the filter mechanism at the top of the Change Analysis module to define a set of criteria by which HP Change Control Management determines which change requests to display in the Change Requests mode or which action items to display in the Action Items mode. This enables you to view only those change requests or action items that interest you when you select the filter you defined.

If you are working in the Change Requests mode, you can:

- search for a specific change request by entering the request's ID number in the **Request ID** box and clicking the **Find** button. For a list of regular expressions that can be used, see page 81.
- select a change request filter. HP Change Control Management displays the change requests that meet the criteria of the change request filter you selected.
- select an action item filter. HP Change Control Management displays the change requests that are associated with the action items that meet the criteria of the action item filter you selected.
- select both a change request filter and an action item filter. HP Change Control Management displays the change requests that meet the criteria of the change request filter you selected and are associated with the action items that meet the criteria of the action item filter you selected. For example, if you want to view all high risk change requests that have open action items associated with them, you would select both a change request filter that includes only high risk change requests and an action item filter that includes only open action items.

If you are working in the Action Items mode, you can:

- search for a specific action item by entering the action item's ID number in the **Action Item ID** box and clicking the **Find** button. For a list of regular expressions that can be used, see page 81.
- select an action item filter. HP Change Control Management displays the action items that meet the criteria of the action item filter you selected.
- select a change request filter. HP Change Control Management displays the action items that are associated with the change requests that meet the criteria of the change request filter you selected.
- select both an action item filter and a change request filter. HP Change Control Management displays the action items that meet the criteria of the action item filter you selected and are associated with the change requests that meet the criteria of the change request filter you selected. For example, if you want to view all action items assigned to you that are associated with high priority change requests, you would select both an action item filter that includes only action items assigned to you and a change request filter that includes only high priority change requests.

Note:

- You can select either a public filter or a filter that you previously created, or you can define a new filter by selecting **New**.

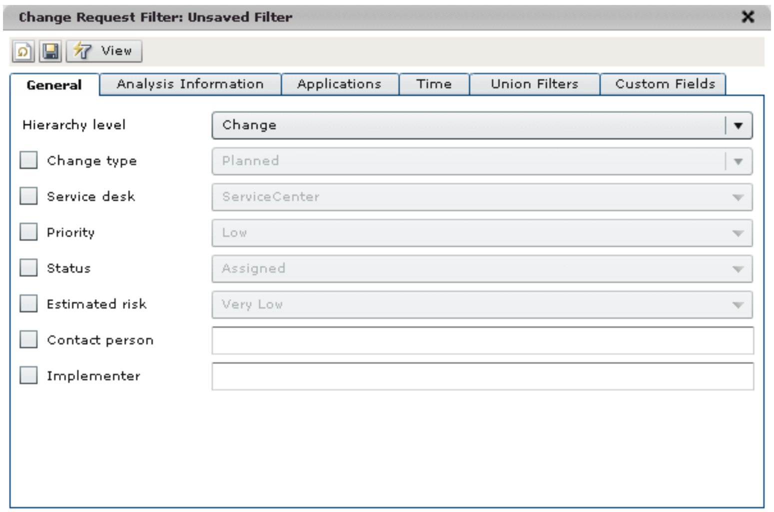
- You can use the **Back** and **Forward** buttons to navigate between your various mode and filter selections.
- The action item filter is not applied to the Action Items view in the Collaboration tab. If you are working with the Change Requests mode, this view displays all the action items associated with the selected change request. If you working with the Action Items mode, this view displays all the action items associated with the change request with which the selected action item is associated.

Defining a Change Request Filter

This section describes how to create a new change request filter. You can create a new change request filter in either the Change Requests or Action Items mode.

To define a new change request filter:

1 Click within the parentheses to the right of **Change requests** in the filter bar and select **New** from the selection box. The Change Request Filter dialog box opens.



2 Click the relevant filter category (**General**, **Analysis Information**, **Applications**, **Time**, and/or any other custom category created by the HP Change Control Management administrator) and select one or more of the filter criteria described in the section “Filter Criteria” on page 78.

Note: HP Change Control Management applies all defined criteria to a filter (using the AND operator). For example, if you defined a filter with **Priority** set to **High** and **Impact Severity** set to **Critical**, you will only see change requests that meet both these criteria (**Priority: High** and **Impact Severity: Critical**).

---

3 To combine the results of the filter you are defining with other pre-existing filters, click the **Union Filters** tab and select one or more filters. For more information on union filters, see "Union Filters" on page 86.

Tip: You can clear the filter properties you defined and start anew by clicking the **Clear** button.

4 Click **Save** to save your filter settings.

  a In the Save Filter dialog box, enter a name for the new filter you are creating.

  b If you are an administrator, you can select the **Public filter** check box to enable the filter you are creating to be viewed by all users.

  c Click **Save & Execute** to save the filter and display the filter results in the Change Requests pane.

If you are a regular user, the filter appears under **My Filters** in the filter selection box. If you are an administrator and selected the **Public filter** check box, the filter appears under **Public Filters** in the filter selection box.

Note: To view the change requests that meet the criteria you selected without saving the filter, click the **View Filtered Results** button.

Filter Criteria

You filter change requests according to different criteria. These criteria are divided into four predefined filter categories: **General**, **Analysis Information**, **Applications**, and **Time**. You can also combine the results of the current filter with other pre-existing filters in the **Union Filters** tab.

Note:

➤ The HP Change Control Management administrator can remove some of the pre-defined filter criteria from the above categories. Some of the criteria listed in the tables below, therefore, may not be available.

➤ The HP Change Control Management administrator can create additional customized filters, in which case additional filter categories are available in the Change Request Filter dialog box. For details on creating customized filters, refer to the *HP Change Control Management Installation and Configuration Guide*.

General

The following table describes the filter criteria that appear in the **General** tab, which are based on fields that originate in the service desk application:

Filter By:	Description
Hierarchy level	Filters change requests according to their hierarchical structure. The following options are available: ➤ **Changes.** Displays only top-level change requests. ➤ **Tasks.** Displays only second-level change requests. ➤ **All (Flat View).** Displays all changes and tasks, including tasks that are part of a parent change, on one level and not in a hierarchical structure. ➤ **Changes and Independent Tasks.** Displays all changes and those tasks that are not part of a parent change. **Note:** The names of the top-level and second-level change requests can be configured in the **enumeration-labels.properties** file. For more information, refer to the *HP Change Control Management Installation and Configuration Guide*. In addition, if you modify the names of the top-level and second-level requests, you should modify the **filters.constraints.hierarchy.@@CHANGES_AND_ORPHANS_TASKS@@** resource in the <**HP Change Control Management installation directory**>**\tomcat\webapps\ccm\WEB-INF\classes\onyxClientResources.properties** file accordingly, so that the last option in this selection box does not read **Changes and Independent Tasks**.

Filter By:	Description
Change type	Filters change requests according to their request type. The following options are available: ➤ **Planned.** Displays regular change requests scheduled in HP Change Control Management. ➤ **Latent.** Displays change requests detected by Mercury Application Mapping. For more information see "Viewing Detected and Latent Changes" on page 127. ➤ **Surrogate.** Displays change requests automatically created by HP Change Control Management to represent a change request existing in the service desk application that has not yet been retrieved by HP Change Control Management.
Detection status	Filters change requests according to the way in which they were detected. The following options are available: ➤ **Not detected.** Displays regular change requests scheduled in HP Change Control Management. ➤ **Detected.** Displays latent changes, or change requests that contain detected changes. For more information, see "Viewing Detected and Latent Changes" on page 127.
Service desk	Filters change requests according to the service desk applications from which they originated. You can select one or more of the listed service desk applications.
Priority	Filters change requests according to their priority levels. You can select one or more of the listed priority levels. The priority levels are determined in the service desk application.
Status	Filters change requests according to their statuses. You can select one or more of the listed statuses. The status is determined in the service desk application.
Estimated risk	Filters change requests according to their estimated risk levels. You can select one or more of the listed risk levels. The estimated risk is determined in the service desk application.
Contact person	Filters change requests according to the contact people responsible for the requests. For a list of the regular expressions that can be used, see the note below.

Filter By:	Description
Implementer	Filters change requests according to their implementers. For a list of the regular expressions that can be used, see the note below.

Note:

You can use the following regular expressions:

- **OR or a comma (,).** This creates a logical OR between the predicates. For example, if you enter **david OR steve**, both **david** and **steve** will be included in the filter. Similarly, if you enter **steve, da***, both **steve** and any string that begins with **da** will be included in the filter.
- **NOT.** By entering NOT at the beginning of the expression, a logical NOT is created for the whole expression. The NOT refers to the entire logical condition, regardless of whether it contains one predicate or more. Parentheses should not be specified. For example, if you enter **NOT a***, all strings that do not begin with the letter **a** will be included in the filter. Similarly, if you enter **NOT da*, steve**, all strings that do not begin with the letters **da** and are not **steve** will be included in the filter.

An asterisk (*) indicates any number of zero or more characters. A question mark (?) indicates any single character.

Analysis Information

The following table describes the filter criteria that appear in the **Analysis Information** tab, which are based on the calculations that HP Change Control Management performs during the processing of change requests:

Filter By:	Description
Impact severity	Filters change requests according to their impact severity levels. You can select one or more of the listed impact severity levels. Impact severity is calculated by HP Change Control Management. For more information about impact severity, see "Viewing Impact Analysis Results" on page 100. **Note:** You cannot filter by impact severity level if you selected **Requests with unknown impact** in the **Applications** tab.
Calculated risk	Filters change requests according to their risk analysis levels. The risk analysis level is a number from 1-100 that indicates the risk level of this change request relative to the other change requests. A higher number indicates a higher risk level. Enter or select a range using the boxes provided. For more information about the calculation of risk levels, see "Viewing Change Request Risk Analysis" on page 103.
Collision severity	Filters change requests according to their collision severity levels. You can select one or more of the listed collision severity levels. Collision severity is calculated by HP Change Control Management. For more information about collision severity, see "Viewing Change Request Collisions" on page 110.
Collision type	Filters change requests according to the types or causes of the collisions. You can select one or more of the listed collision causes. For more information about collision causes, see "Viewing Change Request Collisions" on page 110.

Filter By:	Description
Voted as	Filters change requests according to the user votes they received. You can select one or more of the listed voting options. Users can express their opinion about a change request by posting a vote (Agree, Disagree, To CAB) regarding the request. For more information on change request voting, see "Viewing and Adding Discussion Threads and Comments" on page 121.
Abnormal due to	Filters change requests according to the time period categories whose recurrence rules the requests breach. You can select one or more of the listed time period categories. For more information on time period categories,refer to the *HP Change Control Management Installation and Configuration Guide*. **Note:** When you view the filtered change requests in the Timeline, Application, Implementer, and Calendar views, the time period categories you selected in the Change Requests Filter are automatically displayed.

Applications

You can filter change requests according to their impact by selecting one of the following options in the **Applications** tab:

- **Requests with unknown impact.** Displays only change requests for which there are no impact analysis results.
- **Requests affecting any application.** Displays change requests whose impact analysis results affect any application.
- **Requests affecting my applications.** Displays change requests whose impact analysis results affect the applications associated with you.
- **Requests affecting selected applications.** Displays change requests whose impact analysis results affect the applications you select in the selection box.

To select applications to be included in the filter:

1. Select **Requests affecting selected applications**.
2. In the **Available Applications** list, select the application(s) you want to include in the filter. If the list of available applications is lengthy, you can use the filter box to display only those applications that match the text you enter in the filter box. In addition, you can use the **First**, **Previous**, **Next**, and **Last** buttons to locate an application. You can select multiple applications using the CTRL key.

3. Click the top arrow to move the selected application(s) to the **Selected Applications** list.

Time

You can filter change requests according to time-related criteria by selecting one or more of the following options in the **Time** tab:

Filter By:	Description
Planned (Start, End)	Filters change requests according to their planned execution start and/or end time.
Actual (Start, End)	Filters change requests according to their actual execution start and/or end time.
Request Modifications (Created, Updated)	Filters change requests according to the time at which they were created and/or updated.
Discussion Threads (Created)	Filters change requests according to the time at which request discussion threads and comments were added.

To select filter criteria in the Time tab:

1. In the **Time** tab, select one or more of the filter criteria.
2. From the box to the right of the filter criteria that you selected, choose **Before, After, Between, Yesterday, Last Week, Last Month, Today, This Week, This Month, Tomorrow, Next Week,** or **Next Month**.

3. If you selected **Before, After,** or **Between**, click the calendar button to open the calendar box.
4. In the calendar box, select a month using the left and right arrows next to the month name, select a date from the calendar, and enter or select an exact hour in the time box. Click **OK**.

Note: You select time periods according to your machine's time zone, as indicated in the calendar box.

Union Filters

The **Union Filters** tab enables you to select the pre-existing filters whose criteria you want to combine with the filter you are currently defining. A union filter uses the A AND (B OR C OR D OR...) operator, where A is the current filter and B, C, and D... are pre-existing HP Change Control Management filters.

For example, if your next Customer Advisory Board meeting will discuss change requests scheduled to be executed during the first week in June 2007 that are high risk, collide critically with other requests, or have been voted on prior to the CAB, you would:

- define a filter called **Next CAB Meeting** and select the first week in June under **Planned** in the **Time** tab
- select the **Critical collisions**, **High risk**, and **Voted to CAB** filters that were previously defined in HP Change Control Management in the **Union Filters** tab

When you select the **Next CAB Meeting** filter, HP Change Control Management displays all the change requests that are scheduled for the first week in June 2007 and meet any one of the following criteria:

- risk = high
- collision severity = critical
- contain votes to CAB

To select a union filter:

1. In the **Union Filters** tab's **Available Filters** list, select the filter whose results you want to combine with the current filter. You can select multiple filters using the CTRL key.
2. Click the top arrow to move the selected filter(s) to the **Selected Filters** list.

Note:

➤ Filters containing union filters do not appear in the Available Filters list and therefore cannot be combined as union filters with the current filter you are defining.

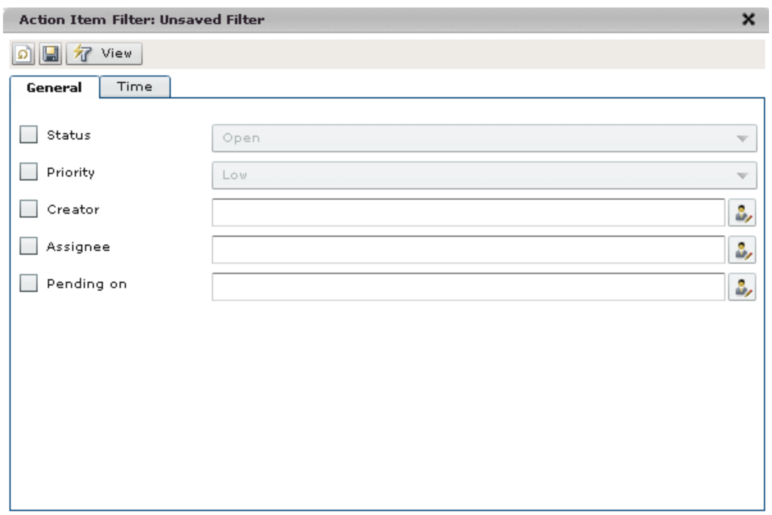
➤ If you selected to combine private filters with the filter you are currently defining, you can save the current filter only as a private filter.

Defining an Action Items Filter

This section describes how to create a new action items filter. You can create a new action items filter in either the Change Requests or Action Items mode.

To define a new action items filter:

1 Click within the parentheses to the right of **Action items** in the filter bar and select **New** from the selection box. The Action Item Filter dialog box opens.



2 Click the General or Time filter category and select one or more of the filter criteria described in the section “Filter Criteria” on page 89.

Note: HP Change Control Management applies all defined criteria to a filter (using the AND operator). For example, if you defined a filter with **Priority** set to **High** and **Status** set to **Open**, you will only see action items that meet both these criteria (**Priority: High** and **Status: Open**).

Tip: You can clear the filter properties you defined and start anew by clicking the **Clear** button.

3 Click **Save** to save your filter settings.

a In the Save Filter dialog box, enter a name for the new filter you are creating.

b If you are an administrator, you can select the **Public filter** check box to enable the filter you are creating to be viewed by all users.

c Click **Save & Execute** to save the filter and display the filter results in the Action Items pane.

If you are a regular user, the filter appears under **My Filters** in the filter selection box. If you are an administrator and selected the **Public filter** check box, the filter appears under **Public Filters** in the filter selection box.

Note: To view the action items that meet the criteria you selected without saving the filter, click the **View Filtered Results** button.

Filter Criteria

You filter action items according to different criteria. These criteria are divided into the following two filter categories: **General** and **Time**.

General

The following table describes the filter criteria that appear in the **General** tab:

Filter By:	Description
Status	Filters action items according to their statuses. You can select one or more of the listed statuses.
Priority	Filters action items according to their priority levels. You can select one or more of the listed priority levels.
Creator	Filters action items according to the user who created them. You can either enter the name of the creator in the text box provided or click the **Creator** button to the right of the text box in order to locate and select the creator in the Select User dialog box.
Assignee	Filters action items according to the user to whom they were assigned. You can either enter the name of the assignee in the text box provided or click the **Assignee** button to the right of the text box in order to locate and select the assignee in the Select User dialog box.
Pending on	Filters action items according to the user whose action is being awaited. You can either enter the name of a user in the text box provided or click the **Pending On** button to the right of the text box in order to locate and select a user in the Select User dialog box.

Time

You can filter action items according to time-related criteria by selecting one or both of the following options in the **Time** tab:

Filter By:	Description
Due date	Filters action items according to the date by which they must be completed.
Modified	Filters action items according to the time at which they were modified.

To select filter criteria in the Time tab:

1. In the **Time** tab, select one or both of the filter criteria.
2. From the box to the right of the filter criteria that you selected, choose **Before, After, Between, Yesterday, Last Week, Last Month, Today, This Week, This Month, Tomorrow, Next Week,** or **Next Month**.
3.  If you selected **Before, After,** or **Between**, click the calendar button to open the calendar box.
4. In the calendar box, select a month using the left and right arrows next to the month name, select a date from the calendar, and enter or select an exact hour in the time box. Click **OK**.

Note: You select time periods according to your machine's time zone, as indicated in the calendar box.

Modifying a Filter

You can modify the properties of the personal filters that you created.

Note:

- You cannot modify the properties of the automatically generated **Favorites** filter.
- Only an administrator can modify the properties of the public filters.

To modify the properties of a filter:

1. In the filter selection box, select the filter whose properties you want to modify. The filter is applied to the Change Requests or Action Items pane.
2. Reopen the filter selection box and select **Edit**.
3. Modify the filter properties as required in the Change Request Filter: <filter name> or Action Item Filter: <filter name> dialog box. For details on modifying a change request filter, see “Defining a Change Request Filter” on page 76. For details on modifying an action items filter, see “Defining an Action Items Filter” on page 87.

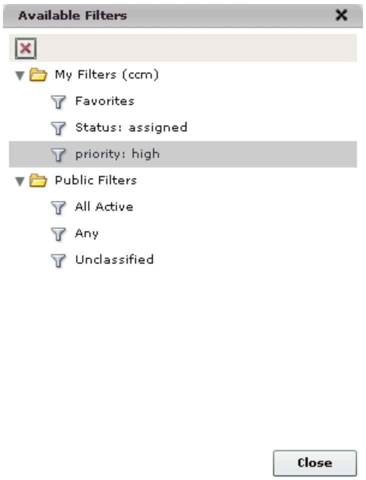
4. Click **Save** to save your modified filter settings.
   a. In the Save Filter dialog box, enter a new name for the filter if you do not want to overwrite the original filter that you created.
   b. If you are an administrator, you can select the **Public filter** check box to enable the filter to be viewed by all users.
   c. Click **Save & Execute** to save the modified filter and display the new filter results.

Deleting a Filter

You can delete any filter that you created, unless it is used as a union filter within another filter. If you are an administrator, you can delete any public filter except the **Any** filter. The automatically generated **Favorites** filter cannot be deleted.

To delete a filter:

1 In the filter selection box, select **Delete**. The Available Filters dialog box opens.



2 Select the filter that you want to delete and click the **Delete** button.

3 Click **Yes** in the deletion confirmation dialog box.

Copying a Filter

You can copy any filter except the **Favorites** filter by saving it under a different name or with different access (private/public) properties.

For example, if you are a regular user and want to modify one of the public filters, you can rename the public filter so that it is saved as one of your personal filters and then modify the filter's properties.

To copy a filter:

1. In the filter selection box, select the filter you want to copy. The filter is applied to the Change Requests or Action Items pane.
2. Reopen the filter selection box and select **Save as**. The Save Filter dialog box opens.

3. In the **Filter name** box, enter the new name you want to assign the filter.
4. If you are an administrator, choose whether you want the filter to be viewed by all users (**Public filter**).
5. Click **Save & Execute**. The copy of the original filter appears in the selection box.

7

Working with the Details and Analysis Pane

This chapter describes the information displayed across the different tabs in the Change Analysis module's Details and Analysis pane. These tabs display information for each change request and are identical for both the Change Requests and Action Items modes. If you are working with the Change Requests mode, the tabs display information for each selected change request. If you are working with the Action Items mode, the tabs display information for the change request associated with each selected action item.

Viewing Change Request Overviews

The Overview tab provides a general overview of the information pertaining to the selected or associated change request. This tab displays summaries of the change request information received from the service desk application, the analysis information performed by HP Change Control Management, and the user discussions and opinions concerning the change request.

The information in the Overview tab is divided into the following three sections:

- General Information
- Analysis Information
- User Information

General Information

The General Information section in the Overview tab displays a summary of the change request information received from the service desk application and includes the following data:

- **Request ID.** The reference ID number of the change request in the service desk application.
- **Service desk.** The service desk application from which the change request originated.
- **Scheduled for.** The scheduled start time of the change request.
- **Duration.** The scheduled duration of the change request.
- **Status.** The status of the change request as defined in the service desk application.

Analysis Information

The Analysis Information section in the Overview tab displays a summary of the change analysis performed by HP Change Control Management for the change request and includes the following data:

- **Impact severity.** Displays the impact severity level of the change request as represented by the impact severity icon. A tooltip indicating the impact severity level of the change request is visible when you hold your mouse over the icon. The icon serves as a link to the Impact Analysis tab.

For more information about impact analysis and how impact severity is calculated, see "Viewing Impact Analysis Results" on page 100.

- **Collisions.** Displays the collision severity level of the change request as represented by the collision severity icon. If the change request collides with more than one other change request, the severity level for the worst collision is displayed. A tooltip indicating the severity level of the collision is visible when you hold your mouse over the icon. The icon serves as a link to the Collisions tab.

  For more information about collisions and how collision severity is calculated, see "Viewing Change Request Collisions" on page 110.

- **Risk analysis.** Displays a number from 0-100 that indicates the risk level of this change request relative to the other change requests. A higher number indicates a higher risk level. The displayed number serves as a link to the Risk tab.

  For more information about the Risk tab and how the risk level is calculated, see "Viewing Change Request Risk Analysis" on page 103.

- **Changed CI(s).** Displays the number of CIs that were changed as a direct result of the change request. The displayed number serves as a link to the Impact Analysis tab.

  For more information about impact analysis, see "Viewing Impact Analysis Results" on page 100.

- **Affected application(s).** Displays the number of applications that were affected as a result of the change request. The displayed number serves as a link to the Impact Analysis tab.

  For more information about impact analysis, see "Viewing Impact Analysis Results" on page 100.

User Information

The User Information section in the Overview tab displays the following information:

- **Discussion threads.** The number of discussion threads posted by users in response to the change request.
- **Disagreed.** The number of users who posted the vote **Disagree** in response to the change request.
- **To CAB.** The number of users who posted the vote **To CAB** in response to the change request.
- **Agreed.** The number of users who posted the vote **Agree** in response to the change request.

Note: The discussion and voting data link to the Discussion view in the Collaboration tab. For more information, see "Viewing and Adding Discussion Threads and Comments" on page 121.

Viewing Change Request Details

The Request Details tab displays the change request details that originate from the service desk application and some key analysis data processed by HP Change Control Management.

Unless otherwise customized by the administrator, the Request Details tab displays the following data:

Field	Description
Service desk	The service desk application in which the change request originated.
Contact person	The name of the user responsible for the change request.
Contact location	The geographic location of the person responsible for the change request.

Field	Description
Priority	The HP Change Control Management priority level of the change request. When you configure HP Change Control Management, you configure the priority levels that can be assigned to a change request.
Estimated risk	The estimated risk level that was assigned to the change request by a user.
Created	The time at which the change request was originally created in the service desk application.
Planned start	The time at which the execution of the change request is scheduled to begin.
Planned end	The time at which the execution of the change request is scheduled to end.
Request ID	The reference ID number of the change request in the service desk application.
Impact severity	The HP Change Control Management-calculated impact severity level of the change request. For more details, about impact severity, see "Viewing Impact Analysis Results" on page 100.
Last impact analysis	The time at which an impact analysis was last calculated.
Risk analysis	Displays a number from 0-100, calculated by HP Change Control Management, that indicates the risk level of this change request relative to the other change requests. For more information about the Risk tab and how the risk level is calculated, see "Viewing Change Request Risk Analysis" on page 103.
Implementer	The person responsible for implementing the change request.
Last updated	The time at which the change request was last updated in the service desk application.
Actual start	The time at which execution of the change request actually began.

Field	Description
Actual end	The time at which execution of the change request actually ended.
Description	A description of the change request, taken from the request's Description field.

Note: For details on customizing the Request Details tab, refer to the *HP Change Control Management Installation and Configuration Guide*.

Viewing Impact Analysis Results

You view the impact analysis calculation results for a change request in the Impact Analysis tab.

The Impact Analysis tab displays the applications and configuration items (CIs) that are affected by the change request. This includes information about the affected applications or CIs and an indication of the severity of the impact on each application or CI (for example, critical or low).

The data in this tab is organized in two ways: according to affected applications and according to affected configuration items (CIs).

If you choose to view impact results according to the applications affected by a change request, HP Change Control Management displays the following from left to right:

➤ a list of the applications affected by the change request

➤ a hierarchy of CIs associated with each selected application that are either changed or affected by the change request

➤ details of each displayed CI in the CI hierarchy

Note: CIs that are affected by a change request, but are not associated with any applications, are displayed under an application entitled **Unassociated**.

If you choose to view impact results according to the CIs affected by a change request, HP Change Control Management displays the following from left to right:

- a hierarchy of CIs that are either changed or affected by the change request
- details of each displayed CI in the CI hierarchy
- a list of affected applications associated with each selected CI

Viewing Impact Severity Levels

The impact severity level of an application is based on the highest impact severity level of the changed CIs that are associated with the application. For example, if there are three changed CIs associated with an application and one has an impact severity level of **Low**, another an impact severity level of **Medium**, and the third an impact severity level of **Critical**, the application will be assigned an impact severity level of **Critical**.

Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels:

Icon	Impact Severity Level
	Critical
	High
	Medium
	Low

Icon	Impact Severity Level
	Very Low
	No impact analysis available

If a CI changes as a result of the change request, a black circle surrounds the impact severity level icon.

A tooltip indicating the impact severity level of the application or CI is visible when you hold your mouse over the severity level icon. **CCI** indicates that the CI changes as a result of the change request. **ACI** indicates that the CI is affected by the modification of the change request.

Viewing Affected Applications

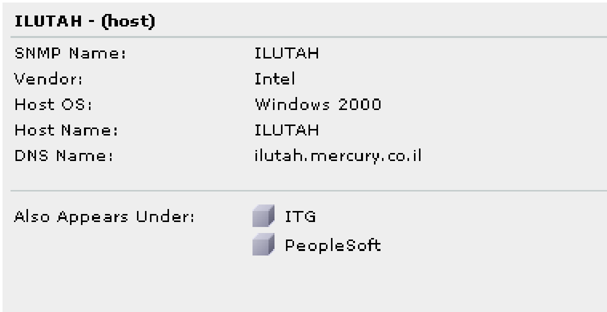
To the left of each application name is an icon indicating whether the application is directly or indirectly affected by the change request:

Icon	Description
	The application is directly affected by the change request (DAA). This means that at least one of the CIs associated with the application is a CCI.
	The application is indirectly affected by the change request (IAA). This means that all of the CIs associated with the application are ACIs.

From each affected application, you can filter the change requests so that only those that affect the current application are displayed. You do this by right-clicking the affected application and choosing **Quick filter: show affecting requests** from the menu. The change requests that affect this application are displayed in the Change Requests pane.

Viewing CI Details

For each CI, you can view the attribute names by which HP Change Control Management identified the CI (defined during the HP Change Control Management configuration process). If you are viewing impact analysis results by application, HP Change Control Management also displays a list of other applications with which the selected CI or one of its children (within the CI hierarchy) is associated.



Viewing Change Request Risk Analysis

HP Change Control Management performs risk analysis on each change request, enabling change managers to compare change requests in terms of the risks involved in their implementation. This section includes the following topics:

- "Understanding Risk Analysis" on page 104
- "Example of Risk Analysis Calculation" on page 105
- "Working with the Risk Tab" on page 108

Understanding Risk Analysis

For each change request, HP Change Control Management calculates a relative risk value using the following formula:

Calculated Risk = **Potential Damage** x **Probability of Failure**

where:

- **Calculated Risk** is a relative value between 0 and 100, with a higher number indicating a higher relative level of risk. The risk value does not reflect an objective, universal risk level. Rather, it indicates the risk level of the selected change request relative to the other change requests.
- **Potential Damage** represents the potential damage that may result from the implementation of the requested change. Potential Damage is calculated as a weighted value between 0 and 10, with a higher number indicating a higher degree of damage.
- **Probability of Failure** represents the probability that the implementation of the change request will fail to some degree and cause possible damage as a result. Probability of Failure is calculated as a weighted value between 0 and 10, with a higher number indicating a higher probability of failure.

Potential Damage and Probability of Failure are calculated based on risk factors that are defined by the HP Change Control Management administrator during the configuration process.

For example, the administrator could define a Probability of Failure risk factor called **New_technology**, which reflects the amount of time that the technology involved in the change request has been used in the organization.

As part of creating a new risk factor, the administrator defines the source of the data (for example, a field in the integrated service desk application), defines mapping rules that translate the source data into factor values between 0 and 10, and assigns a weight to the factor.

The administrator can also define override rules for the risk calculation. For example, the administrator can determine that if the change request involves a technology that is new to the organization, the risk level is automatically set at 100, regardless of the actual risk calculation.

For more information about configuring risk factors, refer to the *HP Change Control Management Installation and Configuration Guide*.

Example of Risk Analysis Calculation

This section provides a detailed example of the process involved in calculating the risk value for change requests.

During the configuration process, the HP Change Control Management administrator defines a risk factor called **New_technology**. This will be one of the factors used to measure Probability of Failure for every change request processed by HP Change Control Management.

The data source for the New_technology risk factor is a required field in the integrated service desk application, which reads as follows: **How long (in months) has the technology involved in this change been used in your organization?** Accepted values are any number between 1 and 36.

The administrator assigns the following mapping rules for the New_technology risk factor that translate the source data into factor values between 0 and 10:

Original Data (Range)	Factor Score
1-12 months	10
12-24 months	5
24-36 months	0

For example, if the technology was introduced 18 months ago, the New_technology risk factor receives a score of 5.

The administrator assigns a weight of 4 to the New_technology risk factor.

The administrator then defines three more risk factors to measure Probability of Failure. The following table summarizes the Probability of Failure risk factors defined by the administrator and their assigned weights:

Factor Name	**Weight**
New_technology	4
QA_approval	8
Affected_CIs	6
Duration_of_change	2
	Total weight = 20

After defining the risk factors used to measure Probability of Failure for each change request, the administrator performs the same process to define a separate set of risk factors that will be used to measure Potential Damage for each change request.

Now assume that a particular change request involving a fairly new technology is processed by HP Change Control Management and receives the following Probability of Failure risk factor scores:

Factor Name	**Factor Score**
New_technology	10
QA_approval	4
Affected_CIs	2
Duration_of_change	0

HP Change Control Management calculates a weighted value for each factor using the following formula:

```
Weight/Total Weight x Score = Weighted Value
```

where:

- **Weight** is the weight assigned to the risk factor during the HP Change Control Management configuration process.
- **Total Weight** is the sum of all the weights assigned the risk factors.
- **Score** is the score of the risk factor as translated from the source data. The mapping used to translate source data into a score is defined during the HP Change Control Management configuration process.

Substituting the values for the New_technology risk factor (Weight=4, Total Weight=20, Factor Score=10) into this formula, you arrive at a weighted value of 2:

```
4/20 x 10 =2
```

Weighted values are calculated for all the Probability of Failure risk factors as illustrated below:

Factor Name	Factor Score	Weight	Weighted Value
New_technology	10	4	2
QA_approval	4	8	1.6
Affected_CIs	2	6	0.6
Duration of Change	0	2	0
		Total weight=20	**Probability of Failure=4.2**

The Probability of Failure score is the sum of all the weighted values and amounts to 4.2, as illustrated in the above table.

Using the same method (with separately defined risk factors), the Potential Damage score is calculated and amounts to 5.

The final risk score, calculated using the original risk analysis formula, amounts to 21:

```
Probability of Failure (4.2) X Potential Damage (5) = Calculated Risk (21)
```

As illustrated in this example, the final risk score for the change request incorporates all the risk factors which influence both the probability of failure and the potential damage of this change request.

Working with the Risk Tab

You view the risk analysis for a change request in the Risk tab. The overall risk calculation is displayed in the following format:

```
Potential Damage (#) X Probability of Failure (#) = Calculated Risk (#)
```

If an override rule is in place, the final risk level (**Final Risk**) as defined by the override rule is displayed in red, next to the risk calculation.

The Risk tab also includes distribution charts of the risk factors contributing to the Potential Damage and Probability of Failure calculations. These distribution charts enable you to pinpoint the most significant factors contributing towards the risk level of the selected change request.

The Risk tab is divided into the following three views:

- **Risk Analysis.** An overall summary of the risk analysis for the selected change request, including distribution charts of the risk factors contributing to the Potential Damage and Probability of Failure calculations. The risk calculation is displayed on the top line. If an override rule is in place, details of the override rule are displayed alongside the distribution charts.
- **Potential Damage.** Displays a distribution chart that graphically illustrates the proportional contribution of each risk factor to the Potential Damage calculation, alongside a table that describes details about each risk factor. The same distribution chart is also displayed in the Risk Analysis view. The risk calculation is displayed in the top right-hand corner of the tab.
- **Probability of Failure.** Displays a distribution chart that graphically illustrates the proportional contribution of each risk factor to the Probability of Failure calculation, alongside a table that describes details about each risk factor. The same distribution chart is also displayed in the Risk Analysis view. The risk calculation is displayed in the top right-hand corner of the tab.

The table in the Potential Damage and Probability of Failure views includes the following columns:

Column	Description
Name	The name of the risk factor defined during the HP Change Control Management configuration process.
Description	A description of the risk factor defined during the HP Change Control Management configuration process.
Data	The source data for the risk factor—for example, data from a field in the integrated service desk application.
Weight	The weight assigned to the risk factor during the HP Change Control Management configuration process.
Score	The score of the risk factor as translated from the source data. The mapping used to translate source data into a score is defined during the HP Change Control Management configuration process.
Weighted Value	The weighted value of the risk factor within the final Potential Damage or Probability of Failure score. The weighted value is calculated as follows: **Weighted Value** = **Weight**/**Total Weight** x **Score** where **Weight** is the weight assigned to the risk factor and **Total Weight** is the sum of all the weights assigned the risk factors.

The Potential Damage and Probability of Failure values are calculated by adding the weighted values of all their respective risk factors. This total, reflecting either the Potential Damage or Probability of Failure value, is displayed below the **Weighted Value** column.

Viewing Change Request Collisions

HP Change Control Management automatically identifies change requests involving common key elements that are scheduled to take place over the same or adjacent time periods. This section includes the following topics:

- "Understanding Collisions" below
- "Working with the Collisions Tab" on page 113
- "Performing a Customized Collision Calculation" on page 118

Understanding Collisions

Change requests are defined as colliding when:

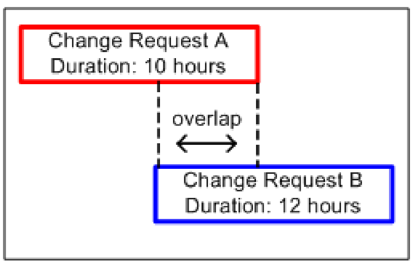
- an application or configuration item (CI) is involved in more than one change over the same time period or adjacent time periods.
- the same implementer is responsible for implementing more than one change over the same time period or adjacent time periods.

HP Change Control Management measures collisions in terms of their proximity level and the cause of the collision.

Proximity Level

The proximity level of two change requests can be defined as either **Overlap** or **Overlap Warning**:

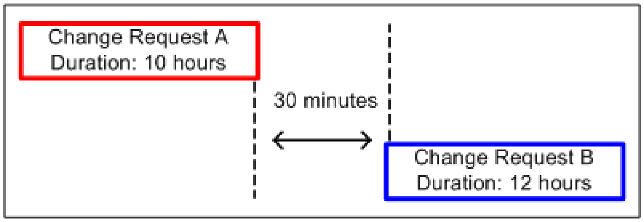
- **Overlap.** The two change requests have overlapping schedules.



- **Overlap Warning.** In reality, planned changes often exceed their original planned duration, which can result in an unforeseen overlap between two change request schedules. In certain cases, if two change requests are scheduled in close proximity to one another, their proximity level is defined as **Overlap Warning**.

  By default, change requests are considered to be within close proximity of one another when the time gap between the first and second change requests is shorter than 10% of the duration of the first change request.

  An example of Overlap Warning between Change Request A and Change Request B is illustrated below, where the gap between the two change requests is 30 minutes, which is less than 10% of the duration of Change Request A (10 hours).



  You can change the time gap according to which HP Change Control Management determines two change requests to be in close proximity in the **HP Change Control Management installation directory>\conf\change-flow.settings file**. For more information, refer to the *HP Change Control Management Installation and Configuration Guide*.

Cause of the Collision

If two change requests overlap, there is not necessarily a collision between them. They could be taking place at the same time without having any effect on one another. HP Change Control Management only defines change requests as colliding if they share one of the following elements:

- **Configuration Item (CI).** Two change requests involve at least one common CI.

  If a CI is changed as a direct result of a change request, it is referred to as a changed CI (CCI). If a CI is not directly involved in the change request, but may be affected as a result, it is referred to as an affected CI (ACI).

For example, if a change request involves increasing the memory on Server A, Server A is referred to as a CCI. If Host Machine B is connected to Server A, but is not directly involved in the change request, it is referred to as an ACI.

- **Affected Application.** Two change requests affect at least one common application.

  If at least one of the CIs associated with an application is a CCI, the application is referred to as a directly affected application (DAA). If all of the CIs associated with an application are ACIs, the application is referred to as an indirectly affected application (IAA).

- **Implementer.** The same implementer is responsible for implementing both change requests.

Collision Severity Level

HP Change Control Management determines a collision severity level for each collision based on the cause of the collision and the proximity level of the change requests.

By default, HP Change Control Management determines the following collision severity levels for each combination of collision cause and proximity level:

	Proximity Level	
Cause	**Overlap**	**Overlap Warning**
CCI-CCI	Critical	Critical
CCI-ACI	High	High
ACI-ACI	(Not defined as a collision)	(Not defined as a collision)
DAA-DAA	High	High
IAA-DAA	Medium	Medium

	Proximity Level	
Cause	**Overlap**	**Overlap Warning**
IAA-IAA	Low	Low
Implementer	Medium	Very Low

For example, change requests that share a common **CCI** (changed CI) and whose proximity level is defined as **Overlap**, would have a **Critical** collision severity level.

Note: If there is more than one cause for a collision, the collision severity level is determined by the cause with the highest severity.

You change the severity level definitions in the **HP Change Control Management installation directory**>**\conf\change-flow.settings file**. For more information, refer to the *HP Change Control Management Installation and Configuration Guide*.

Working with the Collisions Tab

The Collisions tab displays all the change requests that collide with a change request.

By default, collisions are calculated automatically for the scheduled change requests. However, you can also perform a manual collision calculation, enabling you to view the collisions that would occur if a change request were moved to a different time frame. For more information, see "Performing a Customized Collision Calculation" on page 118.

Within the Collisions tab, you can choose to view the collisions in the Grid or Timeline view.

Grid View

In the Grid view, change requests that collide with the selected or associated change request are displayed in a table that is sorted in order of collision severity level. The Grid view table includes the following columns:

Column	Description
Collision Severity	Displays an icon indicating the collision severity level. If there is more than one cause for a collision, the collision severity level is determined by the most severe cause. Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels: Critical High Medium Low Very Low A tooltip indicating the severity level of the collision is visible when you hold your mouse over the collision severity icon. For details on the way in which collision severity is calculated, see "Collision Severity Level" on page 112.
Proximity Level	Displays an icon indicating the collision proximity level. The following icons indicate the following proximity levels: Overlap Overlap Warning A tooltip indicating the proximity level of the collision is visible when you hold your mouse over the collision severity icon. For more information on proximity levels, see "Proximity Level" on page 110.
Summary	Displays a brief overview of the conflicting change request.
Request ID	Displays the service desk application reference ID number of the conflicting change request.

Column	Description
Causes	Displays the cause(s) of the collision. Change request collisions can be caused by several factors (CI-, application-, or implementor-related). If there are multiple factors causing a collision, all of the factors are listed. The following is a list of all the possible collision causes: ➤ **CCI-CCI.** A common CI is changed by both change requests. ➤ **CCI-ACI.** A common CI is changed by one of the change requests and indirectly affected by the other change request. ➤ **ACI-ACI.** A common CI is indirectly affected by both change requests. ➤ **DAA-DAA.** A common application is directly affected by both change requests. ➤ **IAA-DAA.** A common application is directly affected by one of the change requests and indirectly affected by the other change request. ➤ **IAA-IAA.** A common application is indirectly affected by both change requests. ➤ **Implementer.** A common implementor is responsible for implementing both change requests. For more information about collision causes, see "Cause of the Collision" on page 111.
Start	Displays the date on which the execution of the conflicting change request is scheduled to begin. A tooltip indicating the scheduled start time and date is visible when you hold your mouse over the start date.
End	Displays the date on which the execution of the conflicting change request is scheduled to end. A tooltip indicating the scheduled time and date is visible when you hold your mouse over the end date.
Implementer	Displays the name of the implementer responsible for implementing the conflicting change request.

Timeline View

In the Timeline view, change requests that collide with the selected or associated change request are displayed as blocks of time on a timeline, where each line represents a separate colliding change request. The selected or associated change request is always displayed first in the timeline as a point of reference and is labeled **Reference**. The colliding change requests are labeled by their request ID numbers.

The color of the block indicates the severity level of the collision. If there is more than one cause for a collision, the collision severity level is determined by the most severe cause.

By default, the following colors indicate the following collision severity levels:

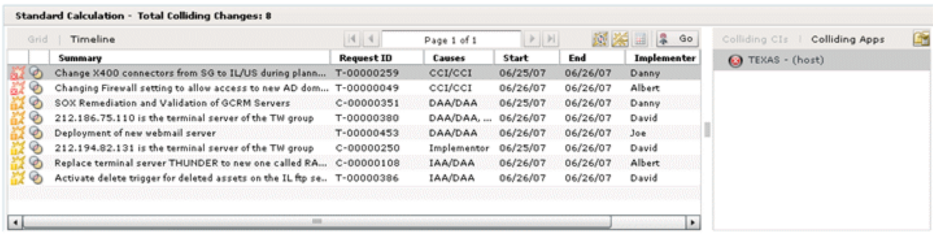
- Red – Critical
- Orange – High
- Yellow – Medium
- Khaki – Low
- Olive Green – Very Low
- Gray – No collision analysis available

A tooltip displaying detailed information about the colliding change request is visible when you hold your mouse over the change request block.

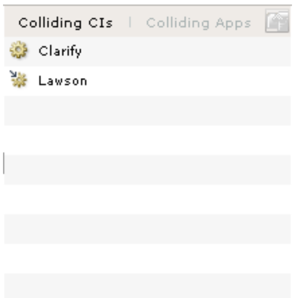
Tip: You can select a specific time period on which to focus using the **Zoom In/Zoom Out** button and time period selection box.

Viewing More Information About Colliding Change Requests

When you select a change request in either the Grid or Timeline view, the colliding CIs and/or applications are described in more detail (where relevant) in the right-hand pane of the Collisions tab.



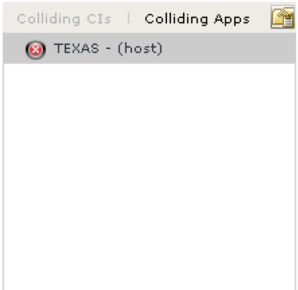
To view the list of affected applications involved in a collision, select a colliding change request. The **Colliding Apps** view is displayed in the right-hand pane.



The icon to the left of the application name indicates whether the application is directly  or indirectly  affected by the collision. If at least one of the CIs associated with the application is a CCI, the application is directly affected by the collision. If all of the CIs associated with the application are ACIs, the application is indirectly affected by the collision.

From each affected application, you can filter the change requests so that only those that affect the current application are displayed. You do this by right-clicking the affected application and choosing **Quick filter: show affecting requests** from the menu. The change requests that affect this application are displayed in the Change Requests pane.

To view the hierarchy of configuration items that are involved in a collision, select a colliding change request and click **Colliding CIs** in the right-hand pane.



You can click the expand arrow to view the full hierarchy of CIs. The colliding CIs are listed alongside an icon indicating the impact severity level of the CI. For more information about impact severity, see "Viewing Impact Analysis Results" on page 100. A tooltip displaying more information about the colliding CI is visible when you hold your mouse over the CI name.

To view the attribute names by which Change Control Management identifies a CI (defined during the Change Control Management configuration process), select the CI in the right-hand pane and click the **CI Attributes** button.

To view a conflicting change request in the Change Requests pane, select the request in the Collisions tab and click the **Go to Colliding Request** button.

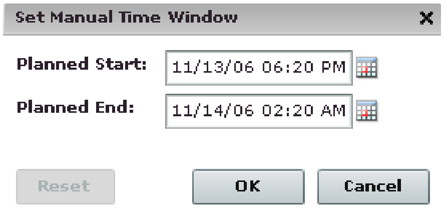
Performing a Customized Collision Calculation

In certain situations, you may want to reschedule a change request to a new time frame. Before you actually reschedule the change request, you can check whether collisions will occur during different time frames and search for a time frame that will involve a minimal number of collisions. You do this by performing a customized collision calculation.

To perform a customized collision calculation:

1. In the Change Requests or Action Items pane, select the relevant change request, or action item associated with the relevant change request.

2 In the **Collisions** tab, click the **Customized Mode** button. If you have not yet set a time frame for your calculation during this session, the Set Manual Time Window dialog box opens automatically.



If you already set a time frame for the calculation during the present session and you want to change it, click the **Set Collision Time Frame** button in the Collisions tab to open the Set Manual Time Window dialog box.

Note: You can reset the start and end times of the change request to their original settings by clicking **Reset** in the Set Manual Time Window dialog box.

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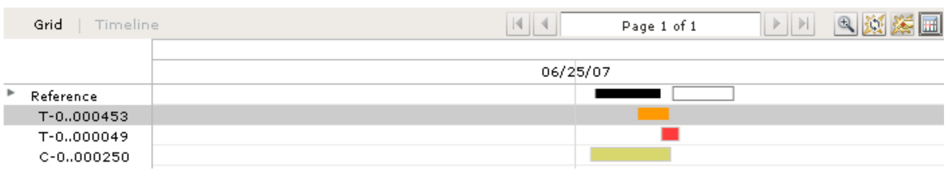
3 In the **Planned Start** and **Planned End** boxes, select the start and end times for the time frame you want to evaluate (according to your machine's time zone) and click **OK**. The Collisions tab displays the change requests that collide with the selected change request during the new time frame.

In the Collisions tab's Timeline view, the original time frame for the request is represented by a black bar in the Reference row, while the customized collision time frame is represented by an outlined white bar.



You can return to the default mode in which collisions are calculated automatically for the scheduled change requests by click the **Standard Mode** button.

Working with the Collaboration Tab

The Collaboration tab contains the following three views that enable users to add information to HP Change Control Management regarding a specific change request:

- **Action Items.** If you are in the Change Requests mode, this view enables you to view the action items associated with a change request and work with these action items as you would in the Action Items pane of the Action Items mode. If you are in the Action Items mode, this view enables you to view all the action items associated with the same change request as the selected action item. For information on this tab, see "Viewing Action Items" on page 120.
- **Discussion.** Enables users to post comments about a change request and express an opinion about a change request by casting a vote (Agree, Disagree, To CAB). For information on this tab, see "Viewing and Adding Discussion Threads and Comments" on page 121.
- **Resolution.** Enables certain users to approve or retract a change request, depending on the status of the request, and all users to view the history of all the approvals and/or retractions of a request. For information on this tab, see "Approving and Retracting Change Requests" on page 124.

Viewing Action Items

The Collaboration tab's Action Items view displays the action items associated with a change request. For a detailed explanation of action items, see "About Action Items" on page 62.

The Action Items view contains two sections:

- The left-hand section displays a grid view of the action items associated with the change request. For an explanation of the columns in the grid, see page 64.
- The right-hand section displays information for each action item selected from the grid. For an explanation of the information in this section, see page 66.

For details on working with action items, see "Working with Action Items" on page 67.

You can instruct HP Change Control Management to display an action item in the Action Items pane by selecting the action item and clicking the **Show in Action Items Pane** button.

Viewing and Adding Discussion Threads and Comments

The Collaboration tab's Discussion view displays the discussion threads and comments as well as a summary of the votes (Agree, Disagree, To CAB) pertaining to the selected or associated change request. This view enables users to conduct online discussions about a change request prior to the CAB actually meeting to discuss it. As a result, the CAB discussion can begin at a more advanced stage or may not be necessary at all if it is clear from the user responses whether or not the change request should be approved.

The Discussion view is divided into the following two sections:

➤ **Request Discussion pane.** Displays all the discussion threads pertaining to the change request. Each thread includes a heading with the name of the user who initiated the discussion, an icon representing the vote posted by the discussion initiator, the date and time of the initial comment, the subject and text of the initial comment, and the comments posted by other users to the thread.

You can expand/collapse all the comments included in the discussion threads by clicking the **Expand/Collapse All Comments** button in the top right-hand corner.

➤ **Voting Summary tree.** Displays a summary of the most recent votes posted by discussion initiators for the change request. Each available voting option is displayed (Disagree, Agree, To CAB, and No Vote) with the number of users who voted for that option displayed in parentheses.

Note: Only the user's most recent vote is taken into account in the Voting Summary tree.

Under each voting option, a list of users (discussion initiators) who voted for that option is displayed. You can expand or collapse the list of users under each voting option by clicking the arrow next to the voting option.

When you select a user in the Voting Summary tree, all the discussion threads initiated by that user are displayed in the Request Comments pane. To view all the discussion threads initiated by all the users, click **All** in the Voting Summary tree. To sort the discussion threads chronologically, click the arrow button in the top right-hand corner.

Note: Users can initiate more than one discussion thread for each change request. All discussion threads are displayed along with the user's most recent vote.

Adding a Discussion Thread

You can add a discussion thread to any change request. As part of the discussion thread, you can express an opinion about the change by selecting one of the following voting options:

- **Disagree**
- **To CAB**
- **Agree**

You can add more than one discussion thread for each change request. All discussion threads along with the user's most recent vote are displayed in the Collaboration tab.

To add a discussion thread to a change request:

1. In the Change Requests pane, select the relevant change request.

2. Click the **New Discussion Thread** button. The New Discussion Thread dialog box opens.
3. Type a subject and a message. The **Subject** field is mandatory.
4. Select one of the voting options. If you voted on this change request at least once before, your most recent vote is displayed as the **Current vote** on the right-hand side of the dialog box.
5. Click **Submit** to add the discussion thread.

Note: You can add a discussion thread to a change request from the Collaboration tab's Discussion view by clicking the **New Discussion Thread** button in the top right-hand corner of the view.

Posting a Comment to a Discussion Thread

You can post a comment to an existing discussion thread or to another comment within a discussion thread.

To post a comment:

1. Click the **Post to Thread** button in the top right-hand corner of the discussion thread or comment heading. The Post to Thread dialog box opens.
2. Type a subject and a message. The **Subject** field is mandatory.
3. Click **Submit** to post the comment.

Sending Discussion Threads by E-Mail

You can send one or more discussion threads by e-mail.

To send discussion threads by e-mail:

1. Using the Voting Summary tree, display the discussion threads you want to send in the Collaboration tab's Discussion view.

2. Click the **Send E-Mail** button in the top right-hand corner of the Discussion view. The Send E-Mail dialog box opens.
3. Enter the e-mail address of each recipient of the e-mail, enter any additional comments you have on the change request, and click **Send**.

Approving and Retracting Change Requests

In the Collaboration tab's Resolution view, you can approve or retract a change request, depending on the status of the request, if you have been granted **Approver** status in HP Change Control Management. The approval/retraction of a change request within HP Change Control Management results in an updated status of the request within the service desk application. In addition, you can use this section of the Collaboration tab to view the history of all the approvals and/or retractions of a change request in HP Change Control Management.

This feature enables you to manage the request approval process from HP Change Control Management, without having to directly access each request from within the service desk application.

Note: To check whether your service desk application supports this feature, contact customer support.

To approve a change request:

1. Ensure that you have been granted **Approver** status. For details on assigning **Approver** status to a user, refer to the *HP Change Control Management Installation and Configuration Guide*.
2. In the Change Requests or Action Items pane, select the relevant change request, or action item associated with the relevant change request.
3. In the **Collaboration** tab, select the **Resolution** view. The **Checking status** status message is displayed alongside the buttons in the left-hand pane while HP Change Control Management checks the following:
   - ➤ whether you have **Approver** status
   - ➤ whether request approval is authorized by the service desk application
   - ➤ whether the selected change request can be approved at the current time

If all the above criteria are met, the **Approve** button is enabled. If request approval is not authorized by the service desk application, an **Operation not supported** status message is displayed alongside the buttons in the left-hand pane. If the change request was recently approved and its status has not yet been updated in HP Change Control Management, an **Approved** status message is displayed alongside the Approve button.

If an error occurred during the HP Change Control Management verification process, an error message is displayed beneath the buttons in the left-hand pane.

4. Click **Approve**. The Approve Change Request dialog box opens.
5. In the Approve Change Request dialog box:
   a. In the **Comments** box, enter the information you want HP Change Control Management to display as part of your approval. This information is not transferred to the service desk application.
   b. Enter the user name and password of your service desk application. HP Change Control Management saves this information until you end your session so that you do not have to re-enter this information for each change request that you want to approve or retract.
   c. If you configured the selected change request to contain a URL link to the original request in the service desk application, you can view the request in the service desk application by clicking **Open the original request in the service desk application**.
   d. Click **Approve**.

      HP Change Control Management checks whether your user name and password are correct and whether you are currently allowed to approve the change request. If so, HP Change Control Management approves the request and the approval details appear in the Collaboration tab.

      If the authentication data you provided is incorrect, or if you are not currently allowed to approve the change request, HP Change Control Management issues a detailed error message. If the service desk application's version of the request is more current than the version in HP Change Control Management, you receive a message asking whether you want to force the approval of the change request. Select the check box and click **Approve** to force approval.

6 Click **Close** to close the Approve Change Request dialog box. You can view details of your approval in the right-hand pane of the Collaboration tab.

Note: To update a change request's status in the Change Requests pane, you must click the **Refresh** button. The request's status is updated once HP Change Control Management receives the updated request from the service desk application. This may take a few seconds.

To retract a change request:

Follow the above procedure, substituting the **Retract** buttons for the Approve buttons mentioned above. HP Change Control Management retracts the change request and the retraction details appear in the right-hand pane of the Collaboration tab.

Viewing Detected and Latent Changes

Note: This feature may not be available in your HP Change Control Management application. For more information, contact your HP Change Control Management administrator.

You can work with the latent changes feature in different ways. This section assumes that the latent changes feature is fully activated. For more information about the different latent change modes, refer to the *HP Change Control Management Installation and Configuration Guide*.

By default, HP Change Control Management contains all the changes that are scheduled to take place in your environment. However, if you are working with Mercury Application Mapping 6.5 or later, you can configure Mercury Application Mapping to periodically search for actual changes to your environment and send data about these changes to HP Change Control Management. You can then use HP Change Control Management to view data for both scheduled and actual changes.

The latent changes feature enables you to determine whether changes discovered in your environment (**discovered changes**) correspond to changes that were scheduled in HP Change Control Management (**scheduled changes**).

When a change is discovered, HP Change Control Management tries to match the discovered change with scheduled changes according to certain criteria.

➤ If a discovered change matches a scheduled change according to all of the matching criteria, it is defined by HP Change Control Management as a **detected change**.

  Detected changes are displayed with the corresponding change request in the Detected Changes tab. Information received from Mercury Application Mapping is displayed for each detected change.

➤ If a discovered change does not match any scheduled change, or if a discovered change matches the scheduled change only according to some of the matching criteria, it is defined by HP Change Control Management as a **latent change**.

Latent changes are displayed as separate changes in the Change Requests pane, along with all the other change requests. A latent change is indicated by the **Latent** icon and the words **Latent change** in the Grid view's **Summary** column. Information about the discovered change received from Mercury Application Mapping is displayed in the Detected Changes tab.

Note: For a detailed explanation of how this feature works (including a description of the matching criteria) and for information about configuring the latent changes feature, refer to the *HP Change Control Management Installation and Configuration Guide*.

8

Configuring User Settings

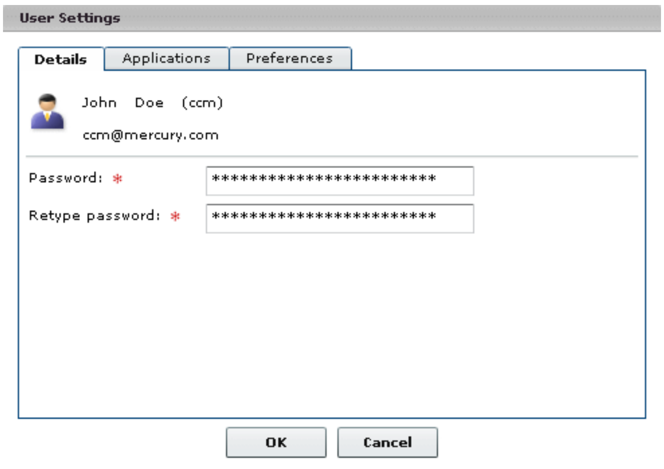
This chapter describes how to view and configure user properties for the current HP Change Control Management user, how to select the applications you want to associate with the current user, and how to define current user preferences.

Viewing and Configuring Current User Properties

You can view the properties of the current HP Change Control Management user that were configured by the administrator and reconfigure these properties, if necessary.

To view and configure user properties for the current user:

1 Select **Preferences** > **User Settings** from the top right-hand corner of HP Change Control Management. The User Settings dialog box opens to the **Details** tab.



You can view the following information for the current user in this tab:

- first name
- last name
- user name with which the user logs in to HP Change Control Management (in parentheses)
- e-mail address

2 To change the user's password, type a new password in the **Password** box and retype this password in the **Retype password** box.

Note: If you are working in identity management mode, these options are disabled.

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3 Click **OK** to save the modified user properties and close the User Settings dialog box.

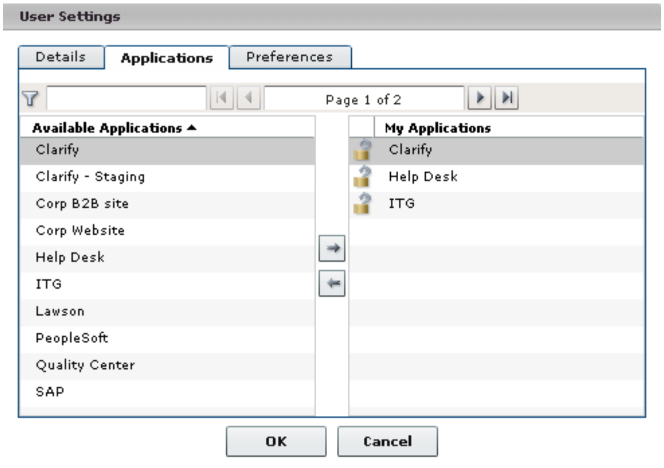
Associating Applications with the Current User

Although the administrator is responsible for the initial association of applications with users, it is possible to associate additional applications with the current user or, in certain cases, remove the association of applications with the current user.

To associate applications with the current user:

1 Select **Preferences** > **User Settings** from the top right-hand corner of HP Change Control Management. The User Settings dialog box opens.

2 Click the **Applications** tab. The available applications are displayed in the **Available Applications** list and the applications already associated with the current user are displayed in the **My Applications** list.



3 In the **Available Applications** list, select the application(s) you want to associate with the current user. If the list of available applications is lengthy, you can use the filter box to display only those applications that match the text you enter in the filter box. In addition, you can use the **First**, **Previous**, **Next**, and **Last** buttons to locate an application. You can select multiple applications using the CTRL key.

4 Click the top arrow to move the application(s) to the **My Applications** list.

To remove the association of an application with the current user, select the application in the **My Applications** list and click the bottom arrow. The application is removed from the **My Applications** list. Note that it is possible to remove the association of an application with the current user only if the administrator did not require the user to view data for the application by enforcing the application for the user.

5 Click **OK** to save the association settings and close the User Settings dialog box.

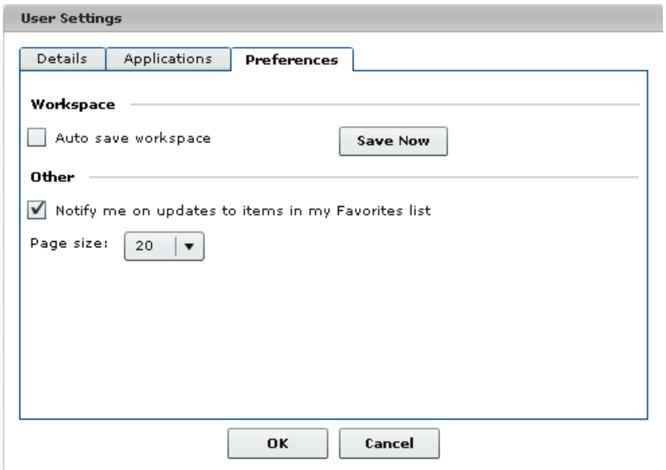
Configuring Current User Preferences

You can configure certain Change Analysis module and notification-related preferences for the current user.

To configure user preferences for the current user:

1 Select **Preferences** > **User Settings** from the top right-hand corner of HP Change Control Management.

2 In the User Settings dialog box, click the **Preferences** tab.



3 Under **Workspace**, you can choose one or both of the following options:

- **Auto save workspace.** HP Change Control Management saves your Change Analysis module settings every two minutes. The next time you log in to HP Change Control Management, the last saved Change Analysis module settings are displayed.
- **Save Now.** HP Change Control Management saves your current Change Analysis module settings immediately.

4. Under **Other**, you can select **Notify me on updates to items in my Favorites list** to receive e-mail notifications in the following cases:
   - ➤ if there was a change in the status of an action item marked as a favorite item
   - ➤ if a derived action item was created from an action item marked as a favorite item
   - ➤ if someone commented on a change request marked as a favorite item
   - ➤ if a change request marked as a favorite item was approved or retracted
   - ➤ if an action item was created for a change request marked as a favorite item

5. To modify the number of change requests or action items displayed by default per page of the Change Analysis module's Change Requests or Action Items pane, select **10**, **30**, **40**, or **50** from the **Page size** box. By default, 20 change requests/action items are displayed on each page.
6. Click **OK** to save the user preference settings and close the User Settings dialog box.

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