

HP Release Control

for the Windows® operating systems

Software Version: 4.00

Installation and Configuration Guide

Document Release Date: June 2008

Software Release Date: June 2008



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Welcome to This Guide

Welcome to the *HP Release Control Installation and Configuration Guide*, which explains how to install and configure HP Release Control software. HP Release Control provides a common platform of decision support for Change Advisory Board members and implementation teams during the release life cycle. HP Release Control analyzes each change request in the system and provides real-time information and alerts during implementation. In addition, HP Release Control enables collaboration, feedback, and review throughout the release life cycle.

This chapter includes:

- How This Guide Is Organized on page 12
- Who Should Read This Guide on page 13
- HP Release Control Documentation on page 13
- Additional Online Resources on page 15

How This Guide Is Organized

This guide contains the following parts:

Part I Getting Started

Provides an overview of HP Release Control and its configuration.

Part II Installation and Deployment

Describes the HP Release Control installation and deployment process and contains information on working with HP Release Control's identity management solution.

Part III Setting Up Your Environment

Describes how to set up your environment before starting to configure HP Release Control. It provides detailed instructions on how to configure your database or user schema, change request field settings, change request conversion from your service desk, Universal CMDB-related settings, general server settings, and business CIs.

Part IV Configuring Analysis of Change Requests

Describes configuration of processes related to the analysis of converted change requests, including impact analysis, risk analysis, collisions calculations, analysis of similar changes. Also describes how to define time periods when changes may and may not be implemented.

Part V Configuring Collaboration and Review Settings

Describes configuration of collaboration settings, including automatic creation of action items, and latent and detected change settings. It also describes configuration of review and post review settings, including updating the service desk with an approval status and post implementation review data, and sending email notifications.

Part VI User Management

Describes configuration of user settings and user authentication.

Part VII System Preferences

Describes configuration of system preferences including email format, log file properties, calendar settings, Dashboard settings, enumeration field display settings, localization settings, and alert settings.

Part VIII Appendices

Contains appendices describing password encryption, GMT time zones, preconfigured change request fields, log files, database configuration and maintenance, and HP Release Control utilities.

Who Should Read This Guide

This guide is intended for the HP service engineers who are responsible for installing and configuring HP Release Control. The sections that describe how to configure various elements of the HP Release Control application are written for the application administrator. Regular users of HP Release Control—that is, those involved in the change process, members of the Change Advisory Board (CAB), NOC users, and change implementors—should refer to the *HP Release Control User Guide*.

HP Release Control Documentation

HP Release Control comes with the following documentation:

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

- in PDF format on the HP Release Control DVD
- in both PDF format and online HTML help format by selecting **Help > HP Release Control Documentation Library** from the HP Release Control application

- in HTML help format, from specific HP Release Control application windows, by clicking in the window and pressing F1, or by selecting **Help** from the main menu

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

- in PDF format on the HP Release Control DVD
- in both PDF format and online HTML help format by selecting **Help > HP Release Control Documentation Library** from the HP Release Control application
- in HTML help format, from specific HP Release Control application windows, by clicking in the window and pressing F1, or by selecting **Help** from the main menu

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

HP Release Control 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 Release Control DVD, or from the HP Release Control application by selecting **Help > HP Release Control 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

HP Software Support accesses the HP Software Support Web site. This site enables you to browse the Self-solve knowledge base. You can also post to and search user discussion forums, submit support requests, download patches and updated documentation, and more. Choose **Help > HP Software Support**. The URL for this Web site is www.hp.com/go/hpsupport.

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract.

To find more information about access levels, go to:
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Part I

Getting Started

1

Configuration Overview

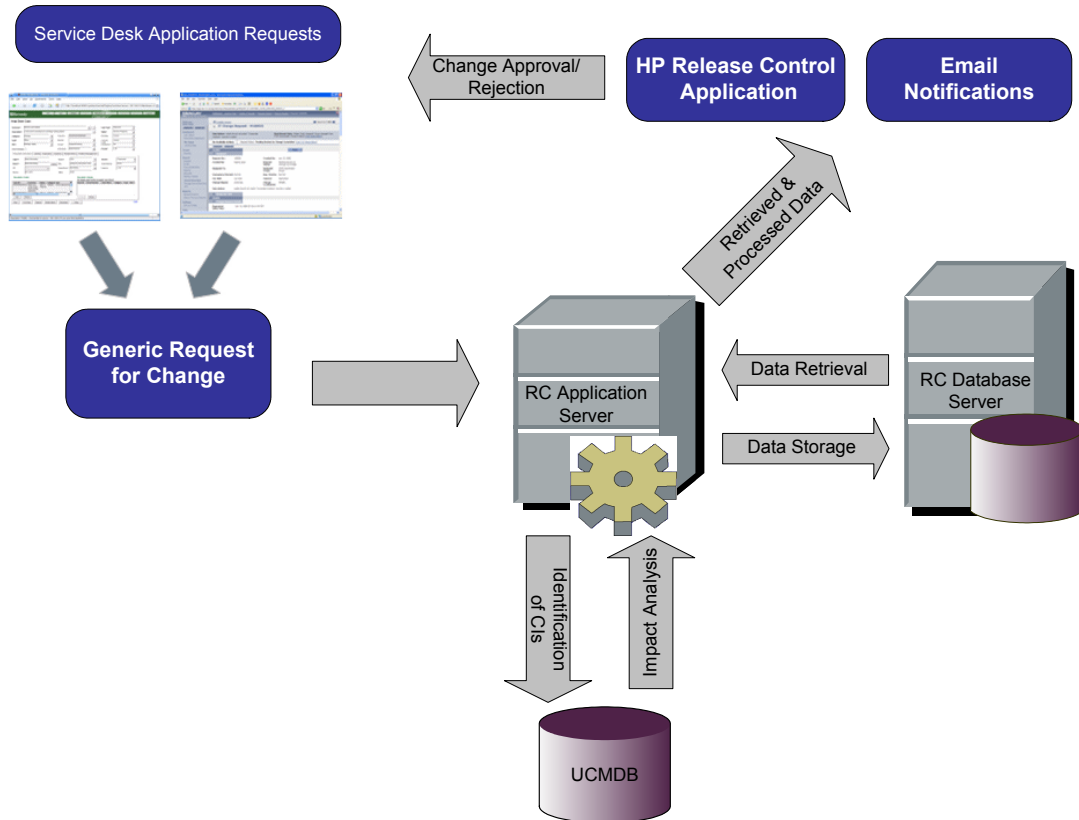
This chapter provides an overview of the HP Release Control configuration process and describes the preparatory steps you should take before beginning the configuration process.

This chapter includes:

- HP Release Control Data Flow on page 20
- The Configuration Process: Basic Overview on page 22
- Configuration Considerations on page 22
- Configuring the System on page 24
- Configuring the Analysis of Change Requests on page 25
- Configuring the Review and Collaboration Settings on page 27
- Configuring General Settings and System Preferences on page 28

HP Release Control Data Flow

The following diagram illustrates the data flow when running HP Release Control:

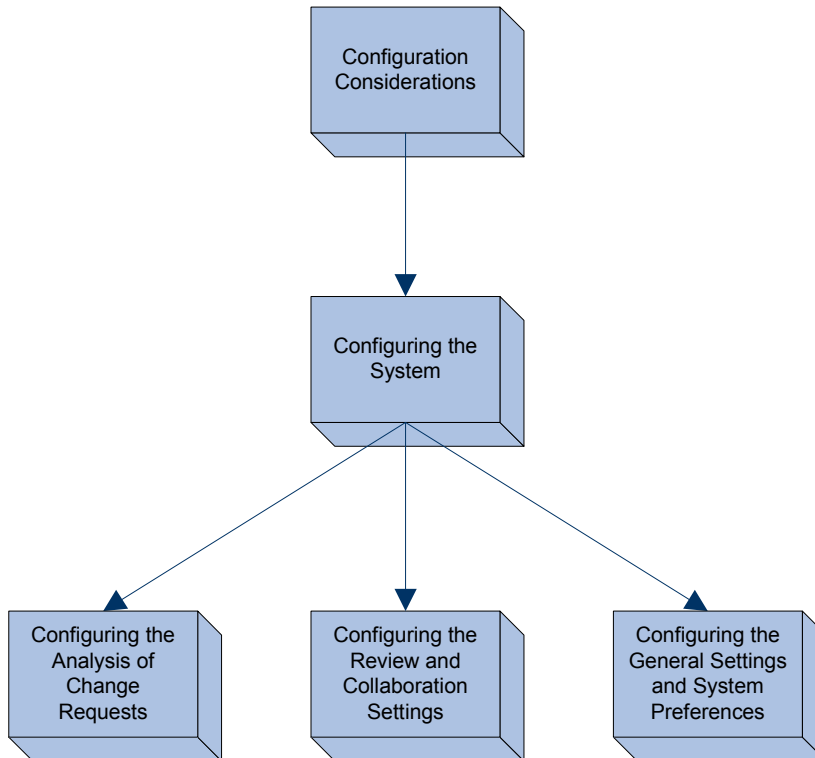


- Change requests originate in the Service Desk Application and are converted into generic requests.
- HP Release Control takes the requests and sends them to HP Universal CMDB to analyze the request and determine the relationships between configuration items (CIs).
- HP Release Control takes the data from HP Universal CMDB and performs impact analysis.

- HP Release Control further analyzes change requests, performing calculations such as risk and collision analysis.
- The information is stored on the RC Database Server.
- Email notifications are sent according to configuration settings to decision makers and changes are approved or rejected.

The Configuration Process: Basic Overview

The following diagram illustrates the major steps involved in the HP Release Control configuration process:



Configuration Considerations

This section includes the steps that you need to consider before configuring HP Release Control.

- 1 Analyze the types of change requests that exist in the service desk application and identify the types for which you want HP Release Control to perform impact analysis.**

Your service desk application may contain a number of different types of

change requests. For some of these change requests, such as a request from product marketing to modify a feature, impact analysis may be highly beneficial and you will want to ensure that HP Release Control performs an impact analysis on these requests.

2 Analyze the service desk application's request fields and the values that can be assigned to each field.

In particular, ensure that you identify the following types of fields:

- Standard ITIL fields (predefined fields in HP Release Control). These include fields such as the request ID number and open/updated dates, as well as enumeration fields, such as the priority, severity, and status fields, which contain values.
- Fields that will serve as input for the impact analysis. These can include both standard and customized fields that contain information on the system's impacted CIs, such as servers, routers, or host machines.
- Fields that decision-makers will want to view in the HP Release Control application.
- Fields that will serve as the data sources for the risk factors that you define.
- Fields that you defined as those which will be used to determine whether changes are defined as similar.

3 Analyze your IT system to ensure that your HP Universal CMDB related settings are configured to properly reflect your system.

HP Release Control locates impacted CIs, presents a list of changed and affected CIs, and calculates impact severity based on:

- the user or instance view that you configured within HP Universal CMDB
- your HP Universal CMDB correlation rules
- and the HP Universal CMDB configuration settings within HP Release Control properties files.

All of these settings should therefore be configured to accurately reflect your IT system. If necessary, you can define additional CIs to ensure that all the applications in your system are properly reflected.

Configuring the System

This section includes the steps to configure the core components of HP Release Control.

1 Run the installation.

Install HP Release Control and perform the post-installation procedures. For more details, see “Installing HP Release Control” on page 31.

2 Set up your database.

To work with HP Release Control, you must create either a Microsoft SQL Server database or an Oracle Server user schema. For more details, see “Configuring the Database or User Schema” on page 53.

3 Configure the conversion of service desk application requests.

For requests to be processed by HP Release Control, they must be converted from their service desk application formats to a generic format by performing the following steps:

- Create the fields in the generic request which will eventually store the information from the original service desk request. For more details, see Chapter 4, “Configuring Change Request Field Settings.”

- Map the relevant data from the service desk request to the fields of the generic request. For more details, see Chapter 5, “Configuring the Conversion of Requests.”

4 Configure HP Universal CMDB related settings.

HP Universal CMDB is a key component in the processing of HP Release Control requests. To work with HP Universal CMDB:

- Configure the HP Universal CMDB settings. For details, see “Basic Configuration of HP Universal CMDB Settings” on page 121.
- Optionally, you can configure advanced settings. For details, see “Advanced Configuration of HP Universal CMDB - All Versions” on page 124.
- There are optional advanced settings which apply to various versions of HP Universal CMDB as follows:
 - If you are working with HP Universal CMDB 6.6, see “Advanced Configuration of HP Universal CMDB - Version 6.6” on page 129.
 - If you are working with HP Universal CMDB 7.0 and higher, see “Advanced Configuration of HP Universal CMDB - Version 7.x” on page 132.

Configuring the Analysis of Change Requests

This section includes the steps to configure the analysis of change requests in HP Release Control.

1 Perform the initial configuration.

The initial configuration consists of configuring the calculation of certain pre- and post-change request processing factors. You can also configure how often change requests will be collected.

For more details, see “Before Configuring Change Request Analysis” on page 153.

2 Analyze the collected requests.

To analyze the collected requests, HP Release Control must identify the location and format of the CIs contained in the requests, using specific analysis rules. For details on configuring the analysis rules you want HP Release Control to use, see “Configuring Analysis Rules” on page 158.

3 Calculate impact analysis for the requests

HP Release Control calculates the impact of the CIs identified in the collected requests according to a calculation rule that you configure. For details on configuring a calculation rule that determines the point or points at which an impact analysis is performed, see “Determining When to Calculate Impact Analysis” on page 155.

4 Determine the time period categories that your system should include and the rules that should apply to each category.

HP Release Control calculates the compliance of change requests with the rules pertaining to the time period categories in which the requests fit. You must determine the Change Allowed and Changes Not Allowed time periods for each category of changes, as well as the criteria by which HP Release Control determines whether a change request is included in a defined time period category. For more details, see “Configuring Time Periods” on page 165.

5 Configure the collision calculation settings.

HP Release Control identifies and calculates collisions between requests according to properties that you define, for the requests that you instruct HP Release Control to include in the collision calculation. For details on configuring HP Release Control’s collision calculations, see “Configuring Collision Calculations” on page 175.

6 Calculate risk analysis for the requests.

HP Release Control calculates the risk involved in the implementation of each request based on risk factors that you define and the risk calculation properties that you configure. For details on defining risk factors and configuring risk calculation properties, see “Configuring Risk Analysis” on page 189.

7 Configure similar changes.

HP Release Control automatically identifies and compares elements which are common to all change requests, and generates a list of existing changes which are found to be similar to any proposed change request. By comparing a proposed change against this list of similar changes, you can make use of historical data to gain insight into the nature of the proposed change, and therefore better predict its likely outcome. For more details about configuring similar changes, see “Configuring Similar Changes Analysis” on page 201.

Configuring the Review and Collaboration Settings

This section includes the steps to configure the review and collaboration settings in HP Release Control.

1 Determine the conditions for which action items should be automatically created.

By default, HP Release Control automatically creates action items for change requests with a status of **Pending Approval** whose impact severity was equal or greater than **Low** and whose calculated risk value was above **0**. The action items are assigned to the users associated with the business CIs affected by the change requests. For more details, see “Configuring the Automatic Creation of Action Items” on page 207.

2 Configure the Change Request Approval/Retraction operation.

HP Release Control contains a feature that allows users to approve and, if necessary, retract the approval of, change requests. For details on configuring this operation, see “Configuring Change Request Approval” on page 211.

3 Configuring email notifications.

You can configure HP Release Control to send notifications to users who are associated with certain affected business CIs. For details on formatting the notification content and configuring the circumstances under which HP Release Control sends notifications, see “Configuring Notifications” on page 229.

Configuring General Settings and System Preferences

This section includes the steps to configure the general settings and system preferences in HP Release Control.

1 Configure the general settings.

Set up the SNMP mail server and the HP Release Control server. For more details, see “Configuring General Settings” on page 143.

2 Configure the business settings.

You can associate users with Business CIs, and configure the business CI details which are displayed in the UI. For details on configuring this operation, see “Configuring Business Settings” on page 145.

3 Configure the user settings.

Configure the user settings such as user names, passwords, and user authentication. For more details, see “Configuring User Settings” on page 249 and “User Authentication” on page 257.

4 Configure the system preferences.

Configure the system preferences such as email formats, log file properties, calendar settings, and dashboard settings. For more details see “Configuring System Preferences” on page 271.

Part II

Installation and Deployment

2

Installing HP Release Control

This chapter provides an explanation of the installation and post-installation procedures you must perform in order to work with HP Release Control. It also describes the HP Release Control system requirements.

This chapter includes:

- System Requirements on page 32
- Installation Procedures on page 33
- Post-Installation Procedures on page 42
- Upgrading to HP Release Control 4.00 on page 44

System Requirements

The following table describes the system requirements for working with HP Release Control:

CPU	Windows Pentium 4
Memory (RAM)	Minimum of 2 GB
Free Disk Space	Minimum of 5 GB
Machine	<ul style="list-style-type: none"> ➤ VMware ➤ Physical
Operating System	<ul style="list-style-type: none"> ➤ Windows 2000 Server Service Pack 4 ➤ Windows 2003 Server Enterprise Edition Service Pack 2
Database	<ul style="list-style-type: none"> ➤ Microsoft SQL Server 2005; 2005 Compatibility Mode 80; (Enterprise Editions for all) ➤ Oracle 9.2.0.x, 10.2.x
HP Universal CMDB/ Mercury Application Mapping	<ul style="list-style-type: none"> ➤ HP Universal CMDB version 7.0 (Typical CMDB Installation) ➤ Mercury Application Mapping version 6.6 (Typical and Shared CMDB Installations) <p>For a full list of system requirements for each of these versions, refer to the HP Universal CMDB documentation.</p>
Browser	<ul style="list-style-type: none"> ➤ Mozilla Firefox 1.0 or later ➤ Microsoft Internet Explorer 6.0, 7.0 ➤ Requires Flash 9
Resolution	<ul style="list-style-type: none"> ➤ Minimum 1024 x 768 ➤ Recommended 1280 x 1024 and higher

Note: For a list of the service desk applications supported, see “About Converting Requests” on page 76.

System Architecture

HP Release Control is a 3-tier application which consists of following:

- Flash-based (fat) client, accessed using a Web browser.
- Application server
- Database server

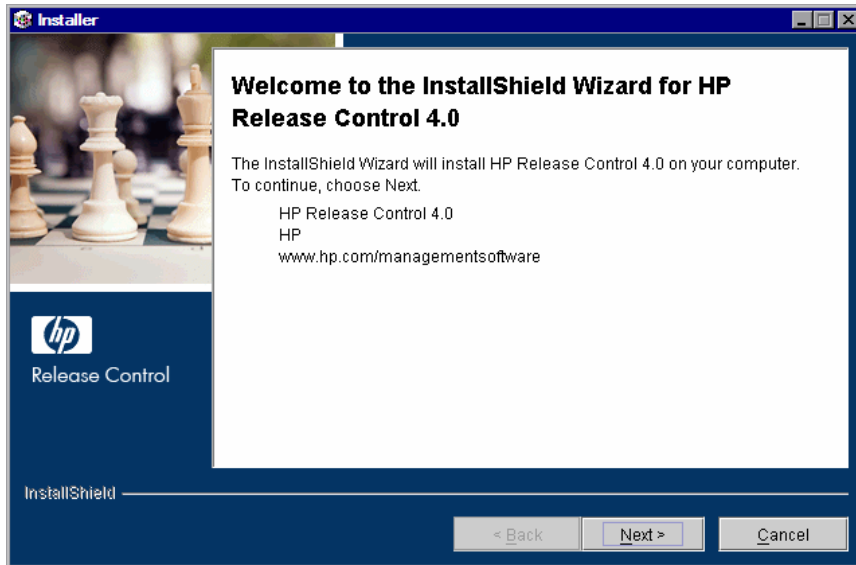
The database server and the HP Release Control application server must sit on the same LAN.

Installation Procedures

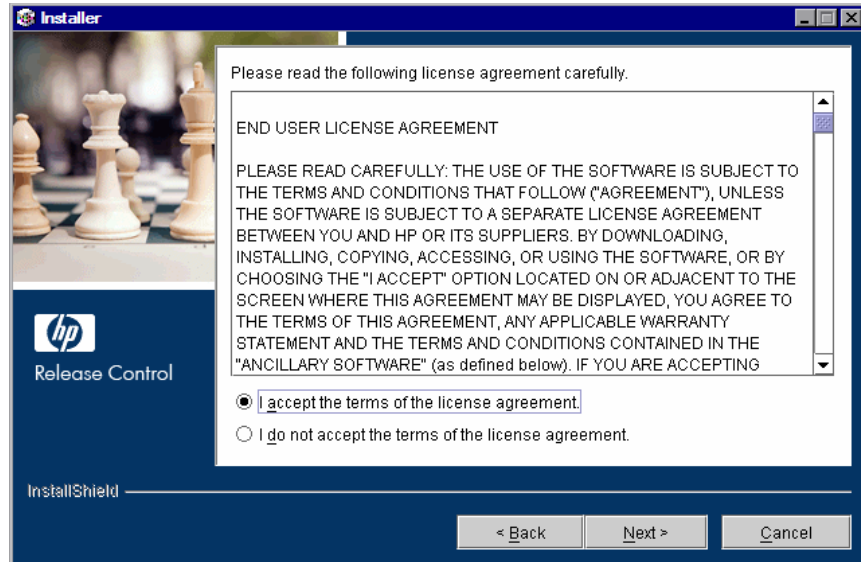
You install HP Release Control using the InstallShield Wizard for HP Release Control.

To install HP Release Control:

- 1 Click the **setup.exe** file located in the **disk1** folder of your HP Release Control DVD. The InstallShield Wizard for HP Release Control opens.

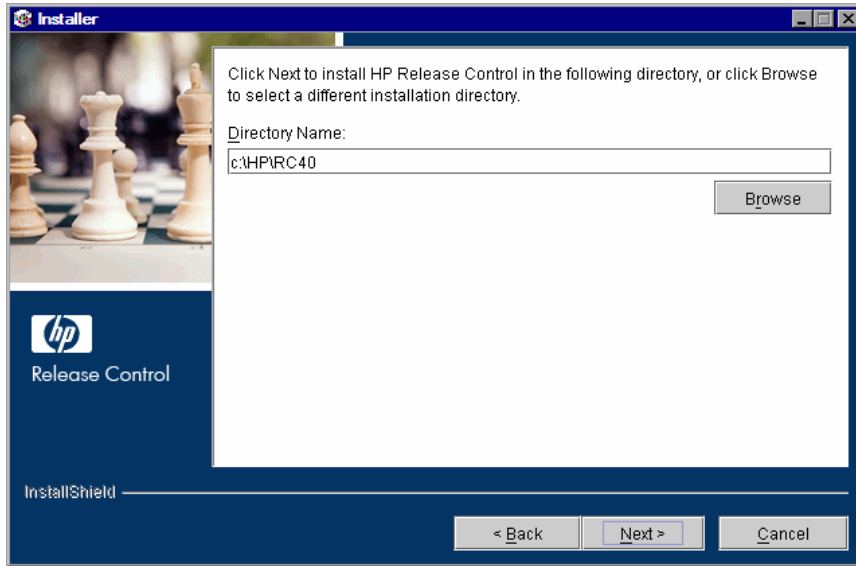


Click **Next**.

2 Accept the terms of the software license agreement that is displayed.

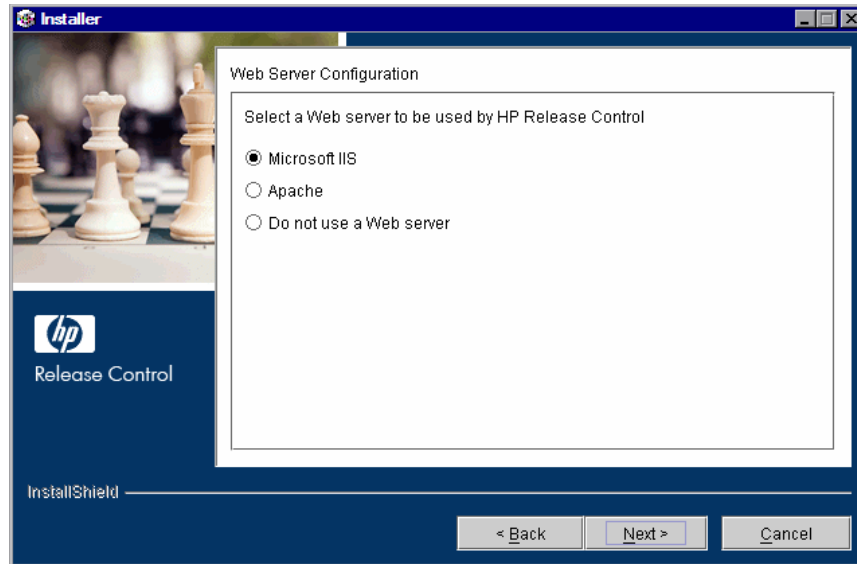
Click **Next**.

- 3 In the following screen, accept the default installation directory or click **Browse** to select a different directory. Note that the directory you select cannot contain spaces.



Click **Next**.

- 4 In the Web Server Configuration screen, select a Web server—**Microsoft IIS** or **Apache**—to be used by HP Release Control. If you want to work with HP Release Control without a Web server, select the **Do not use a Web server** option.

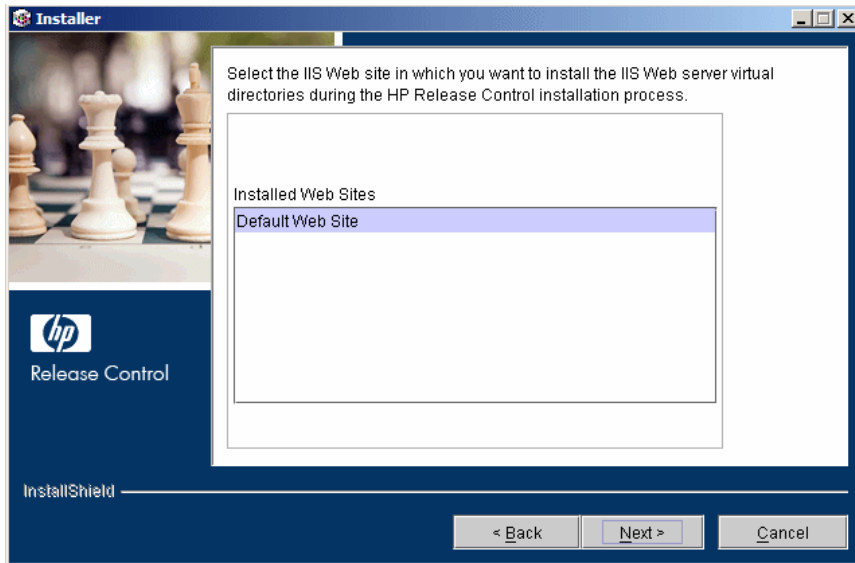


Notes:

- It is assumed that Microsoft IIS is already installed on the HP Release Control server machine.
 - If you select **Apache**, the Apache Web server is installed as a Windows service (**Apache2**) on the HP Release Control server machine during HP Release Control installation.
 - If you select **Do not use a Web server**, the Tomcat server is used, with a default port of 8080. (Note that the Tomcat server is always installed, under the name **Apache Tomcat**.)
 - If you are working with HP Release Control's identity management solution, you must select a Web server to be used by HP Release Control.
-

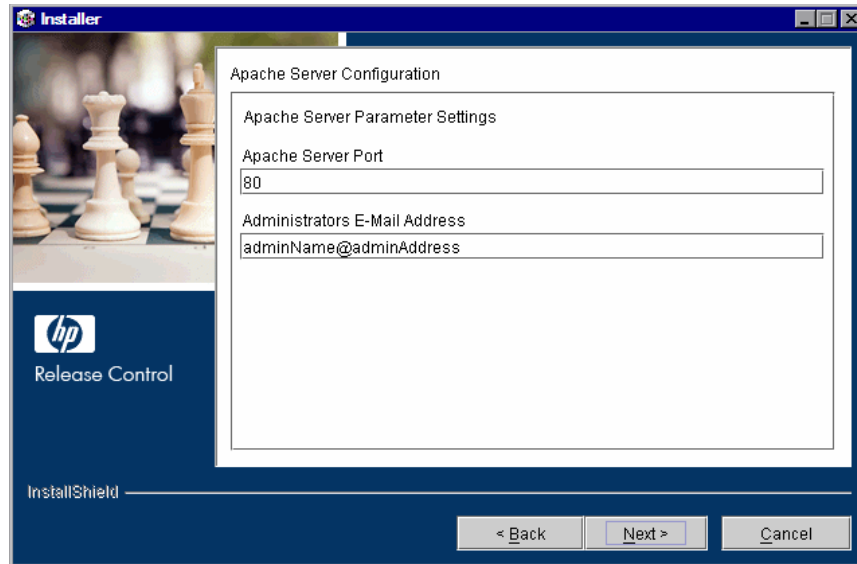
Click **Next**. If you selected **Microsoft IIS**, proceed to step 5. If you selected **Apache**, proceed to step 6. If you selected **Do not use a Web server**, proceed to step 7.

- 5 If you selected Microsoft IIS in the Web Server Configuration screen, you are prompted to select the Microsoft IIS Web site under which you want to install the Microsoft IIS Web server virtual directories.



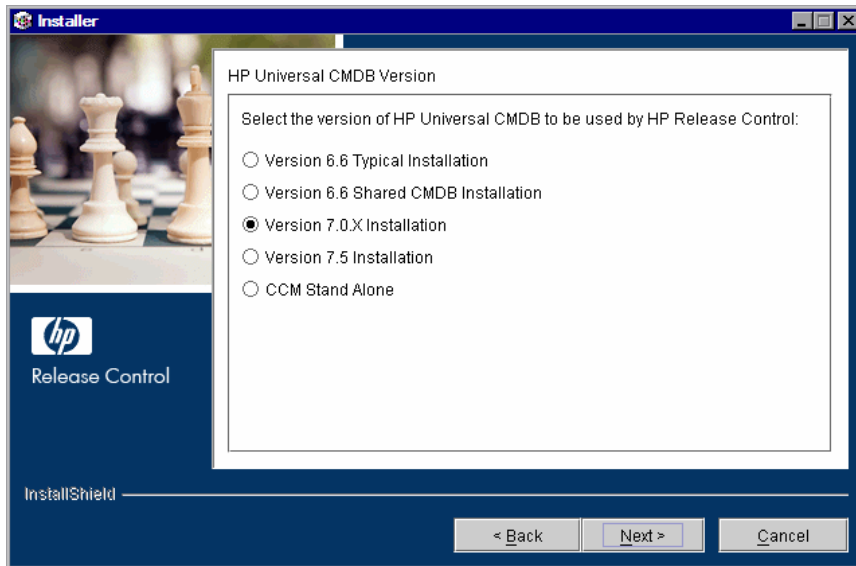
Select the required IIS Web site and click **Next**. Proceed to step 7.

- 6 If you selected Apache in the Web Server Configuration screen, you are prompted to enter the Apache server port through which you want the Apache Web server to communicate with the HP Release Control server, as well as the Apache Web server administrator's e-mail address.



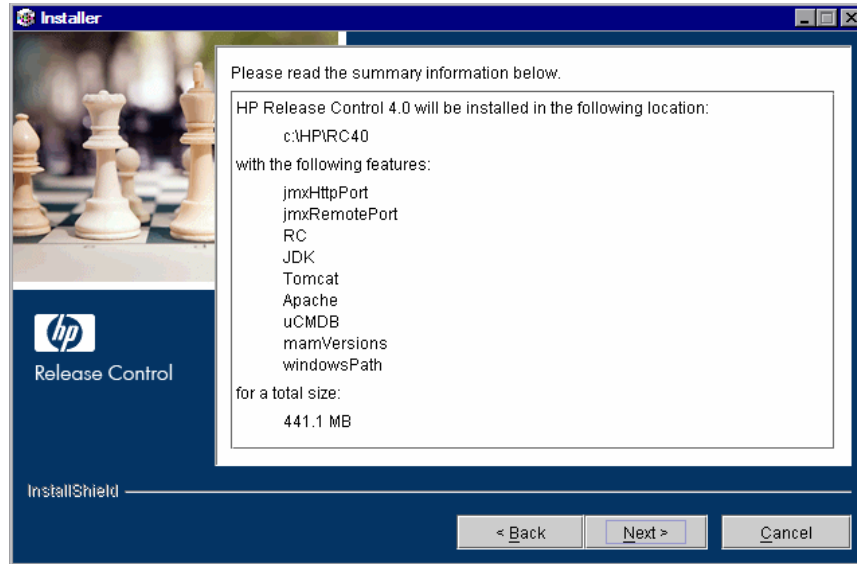
Click **Next**.

- 7** In the following screen, select the version of HP Universal CMDB that you want to use with HP Release Control. Note that only versions 6.6 and higher are officially supported.



Click **Next**.

- 8 Ensure that the information in the summary screen is correct.



To review or change any settings, click **Back**. To accept the settings and begin installing HP Release Control, click **Next**.

- 9 When the installation process has successfully been completed, click **Finish** in the final InstallShield Wizard screen.

Post-Installation Procedures

After you have finished installing HP Release Control, you must perform the following post-installation procedure before you can begin working with HP Release Control.

To enable HP Release Control:

- 1** Create a database or user schema and configure database connection properties as described in “Configuring the Database or User Schema” on page 53.
- 2** Change the command line directory to **<HP Release Control installation directory>\tomcat\webapps\ccm** and run the following command:

```
populate.bat -ir
```

- 3** In the **<HP Release Control installation directory>\utilities\security** directory, run the following:

```
GenerateKeys.bat
```

- 4** If you are working without HP Universal CMDB (Standalone mode) see “About Working in Standalone Mode” on page 137 and then skip to step 7 below.
- 5** If you are working with HP Universal CMDB 6.6, copy the **<HP Release Control installation directory>\MAM\<version number>\<typical or shared>\extension\ccm_package.zip** package to:
 - the **<HP Universal CMDB server>\root\lib\packages** directory, if you are working with HP Universal CMDB only (without Business Availability Center). HP Universal CMDB then automatically loads the package.

- the **<Business Availability Center Modeling Data Processing Server>\mam_lib\packages** directory, if you are working with a shared Business Availability Center–HP Universal CMDB installation. Instruct HP Universal CMDB to load the new package by opening the Business Availability Center Modeling Data Processing Server console (**http://<Business Availability Center server>:8080/jmx-console/**), selecting **MAM > Service=Package manager > deployPackages**, specifying 1 under **customerId** and **ccm_package.zip** under **packagesNames**, and clicking the **Invoke** button.

If you are working with HP Universal CMDB 7.0 or higher, copy the **<HP Release Control installation directory>\MAM\[version]\<typical or shared>\extension\ccm_package.zip** package to the **<HP Universal CMDB installation directory>\root\lib\packages** directory on the HP Universal CMDB server.

- 6 Configure the basic settings within HP Universal CMDB, as described in “Basic Configuration of HP Universal CMDB Settings” on page 121.
- 7 Start the HP Release Control service (**Start > Programs > HP Release Control 4.0 > Start Service RC40**).
- 8 Enter the appropriate URL to access HP Release Control (depends on the user authentication mode you are using).
- 9 Log in to HP Release Control with the user name **admin** and the password **admin**. Ensure that you change this password once you log in. For details on changing your password and creating HP Release Control users, see “Configuring Users” on page 249.

Note: If you are working with HP Release Control’s identity management solution, see Chapter 22, “User Authentication,” for details on adding an administrator and users to HP Release Control.

Upgrading to HP Release Control 4.00

The following section provides information on how to upgrade your current version of the product to HP Release Control 4.00.

To upgrade to HP Release Control version 4.00:

- 1** Install HP Release Control version 4.00 as described in “Installation Procedures” on page 33.
- 2** Back up the database to protect data in case of an error during the upgrade procedure.
- 3** Make sure that the change request queue is empty as follows:
 - a** Reconfigure your old version of the product to stop polling the service desk application for tickets:

In the **adapter.settings** file, change the **polling-schedules** element to:

```
<polling-schedules>0 0 1 * * 2050</polling-schedules>
```

For more information on the **adapter.settings** file and **polling-schedules**, see “Overview of Adapter Configuration” on page 78.

- b** Restart HP Release Control and allow it to process all the change requests still in the queue.
- c** Make sure the queue is empty using the Queue Manager utility located in **<HP Release Control installation directory>\utilities\QueueManager>**. For more information about using the Queue Manager utility, see “Queue Manager” on page 315.

- 4 In the <HP Release Control installation directory>\utilities\upgrade\conf directory, open **upgrade-settings.xml**.

```
<upgrade-context xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <fail-on-error>true</fail-on-error>
  <target-version>4.0.0.1</target-version>
  <file-context>
    <source-folder>[Source-Folder]</source-folder>
    <target-folder>[Installation Folder]</target-folder>
  </file-context>
  <db-context>
    <!-- Available DB drivers:
           MsSql - com.mercury.jdbc.MercSQLServerDriver
           Oracle - com.mercury.jdbc.MercOracleDriver
    -->
    <driver>[Db Driver]</driver>
    <url>[Db Url]</url>
    <username>[User Name]</username>
    <password>[Password]</password>
  </db-context>
</upgrade-context>
```

This file contains the relevant information for performing the upgrade as follows:

- The **fail on error** element defines whether the upgrade procedure should continue or stop if the procedure encounters an error during one of the steps. It is set to stop by default. We recommend that you not modify this element.
- The **target version** element defines which version of HP Release Control to upgrade to. We recommend that you not modify this element.
- The **file context** element contains current and target location information for HP Release Control, where:
 - **source folder** points to the location of the current version of the product on your computer. Make sure that this path is correct.
 - **target folder** points to the location where HP Release Control 4.00 is to be installed. We recommend that you not modify this element.

- The **db context** element shows how HP Release Control 4.00 will connect to your database.

If you are upgrading the same database as your old version of the product, we recommend that you not modify this element.

If you are upgrading a different database (for example, if you are working on a copy of the original database), then you need to edit the **db context** element accordingly. You edit the **db context** element in the same way that you edit the **database.properties** file as described in Chapter 3, “Configuring the Database or User Schema.”

Note: The upgrade procedure does not support any encrypted passwords in the **database.properties** file. If you have any encrypted passwords in the **database.properties** file, edit the password information in the **db context** element of the Upgrade Settings file accordingly. For more information on working with encrypted passwords, see Appendix A, “Password Encryption.”

- 5** In the <HP Release Control installation directory>\utilities\upgrade directory, double-click **upgrade.bat** to perform the upgrade.
- 6** (Recommended) Uninstall the old version of the product.
- 7** Reconfigure the **database.properties** file as explained in Chapter 3, “Configuring the Database or User Schema.”
- 8** Upgrading the Dashboard module:
If you did not modify any of the Dashboard settings in your old version of the product:
 - Open the command prompt and run <HP Release Control installation directory>\tomcat\webapps\ccm\populate_dashboard.bat -ir.

If you modified any of the Dashboard settings in your old version of the product:

- a** In HP Release Control, open the Dashboard module.
 - b** Click the **Migrate Objects** tab.
 - c** In the **Import from File** box, browse to **<HP Release Control installation directory>\utilities\upgrade>manual\4.0\dashboard_portlets.xml**.
 - d** Select **Replace same Portlet Definitions**.
 - e** Click **Import**.
- 9** Under certain circumstances you may need to perform one or more of the following steps:
- **If you are working with HP Release Control in standalone mode:**
Reconfigure the **cmdb-mock.js** script. For more information, see Chapter 7, “Working in Standalone Mode.”
 - **If you did not make any changes in the <HP Release Control installation directory>\conf\reports.ext directory:**
Delete the **reports.ext** directory and replace it with the **reports.ext** directory found in the **<HP Release Control installation directory>\conf.orig** directory.
 - **If you did not make any changes in the <HP Release Control installation directory>\conf\notifications.ext directory:**
Delete the **notifications.ext** directory and replace it with the **notifications.ext** directory found in the **<HP Release Control installation directory>\conf.orig** directory.
 - **If you did not make any changes in the <HP Release Control installation directory>\conf\scripts.ext\change-flow.js file:**
Delete the **change-flow.js** file and replace it with the **change-flow.js** file found in the **<HP Release Control installation directory>\conf.orig\scripts.ext** directory.

- If you made changes in the <HP Release Control installation directory>\conf\scripts.ext\change-flow.js file:

Manually edit the file, paying special attention to the **shouldCalcImpact** and **ShouldAnalyze** functions. For more information on these functions, see Chapter 11, “Configuring Impact Analysis.”

- If you made any changes to the log levels in the ccmlog4j.properties file:

Manually make the same changes in the new file.

- If you manually added .jar files to the <HP Release Control Installation directory>/tomcat/webapps/ccm/WEB-INF/lib directory from a source other than the examples folder (for example, Remedy .jar files):

Copy the files manually to the new **lib** directory.

- 10** If you are using a version of HP Release Control that is configured to use a Microsoft IIS Web server, you need to perform the following steps:

In the IIS Manager:

- a** In the ISAPI Filters tab, select **jakartaFilter** and click **Edit**.
- b** In the Edit Filter Properties dialog box, set the **Executable** field to point to <HP Release Control Installation directory>/webserver/bin/Jakarta/isapi_redirector.dll and close the Edit Filter properties dialog box.
- c** Click **OK** to close the Default Web Site Properties dialog box.
- d** Under **Default Web Site**, right-click **Jakarta** to open the Properties dialog box.
- e** Select the **Virtual Properties** tab.
- f** Set the **Local Path** field to <HP Release Control Installation directory>/webserver/bin/Jakarta.
- g** Click **OK** to close the Properties dialog box.

In the Registry Editor (Start > Run > regedit):

- a** Select **HKEY_LOCAL_MACHINE\SOFTWARE\Apache Software Foundation\Jakarta Isapi Redirector\1.0**.
- b** Set the **log_file** element to point to **<HP Release Control Installation directory>/webserver/logs/isapi/log**.
- c** Set the **worker_file** element to point to **<HP Release Control Installation directory>/webserver/conf/workers.properties**.
- d** Set the **worker_mount_file** element to point to **<HP Release Control Installation directory>/webserver/conf/uriworkermap.properties**.
- e** Open **<HP Release Control Installation directory>/webserver/conf/uriworkermap.properties** and add the following:
 - **/dashboard=localAjp**
 - **/dashboard/*=localAjp**

Part III

Setting Up Your Environment

3

Configuring the Database or User Schema

To work with HP Release Control, you must create either a Microsoft SQL Server database or an Oracle Server user schema (see “System Requirements” on page 32 for MS SQL Server and Oracle Server system requirements). You then configure connection properties for the HP Release Control database or user schema.

This chapter includes:

- Microsoft SQL Server on page 53
- Oracle Server on page 54
- Database Pool Configuration Settings on page 55

Note: For information and guidelines about configuring and maintaining MS SQL and Oracle Server databases, see Appendix E, “Database Configuration and Maintenance.”

Microsoft SQL Server

After you have created an MS SQL Server database, copy the contents of the `<HP Release Control installation directory>\examples\database-config-examples\database.properties.mssql` file to the `<HP Release Control installation directory>\conf\database.properties` file and configure the following properties:

- **server name.** Specify the name of the MS SQL Server.
- **database name.** Specify the name of the MS SQL Server database.

- **password.** Specify the password required to connect to the MS SQL Server database. If the password must be encrypted, see Appendix A, “Password Encryption” for details on encrypting passwords.
- **user name.** Specify the user name required to connect to the MS SQL Server database.

Oracle Server

After you have created an Oracle Server user schema, copy the contents of the file **database.properties.oracle9i** or **database.properties.oracle10g** (depending on your database version) located in <HP Release Control installation directory>\examples\database-config-examples directory to the <HP Release Control installation directory>\conf\database.properties file and configure the following properties:

- **server name.** Specify the name of the Oracle Server.
- **service name.** Specify the service name for the Oracle Server user schema.
- **password.** Specify the password required to connect to the Oracle Server user schema. If the password must be encrypted, see Appendix A, “Password Encryption” for details on encrypting passwords.
- **user name.** Specify the user name required to connect to the Oracle Server user schema.

Database Pool Configuration Settings

You can modify the database pool configuration settings for an MS SQL or Oracle Server database or user schema, if required. For details on configuring database pool settings, refer to the following URL: <http://www.mchange.com/projects/c3p0/index.html>

By default, HP Release Control does not log MS SQL or Oracle Server database statements. To modify this default setting, ensure that the following line in the <HP Release Control installation directory>\conf\ccmlog4j.properties file is not commented out:

```
log4j.logger.org.hibernate.SQL=debug
```


4

Configuring Change Request Field Settings

This chapter describes how to configure change request fields for which you want to view data in the HP Release Control application.

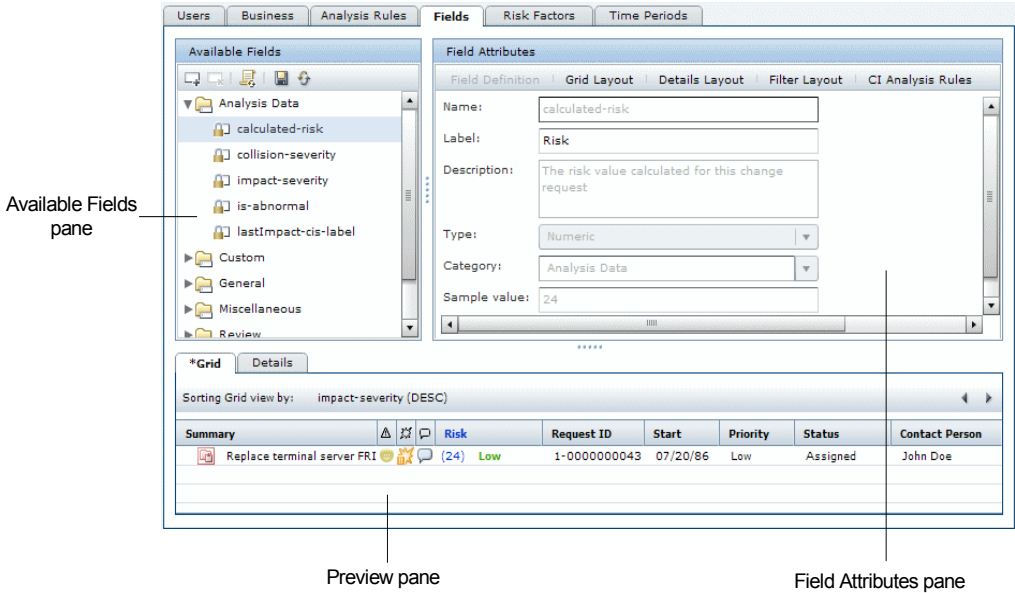
Note: For a list of preconfigured change request fields included in HP Release Control, see Appendix C, “Preconfigured Change Request Fields.”

This chapter includes:

- Understanding the Fields Tab on page 58
- Creating or Modifying Change Request Fields on page 59
- Deleting a Change Request Field on page 69
- Customizing the List View on page 70
- Customizing the Preview > Details Tab on page 71

Understanding the Fields Tab

In the Administration module’s Fields tab, you configure change request fields for which you want to view data in the HP Release Control application. You can define the properties of each field and the way in which the field appears in your application.



The Fields tab is divided into the following three sections:

- **Available Fields pane.** Contains a list of all the change request fields. A field selected in the Available Fields pane can be modified in the Field Attributes pane. For filtering purposes, fields are organized into five default categories: **Analysis Data**, **General**, **Miscellaneous**, **Review**, and **Time**. Fields defined as filterable will appear in the Filter Dialog Box, under the category that is defined here in the Available Fields pane. You can create new categories when you create a new field or modify an existing custom field.
- **Field Attributes pane.** You define or modify the properties of the selected change request field in the Field Attributes pane. This pane is divided into the following tabs: **Field Definition**, **List Layout**, **Details Layout**, **Filter Layout**, and **CI Analysis Rules**.

- **Preview pane.** In the Preview pane, you can see a preview of the selected field as it will appear in the Analysis module's List view and Preview > Details tab. You can also customize the general layout of the List view and the Preview > Details tab as they appear in the Analysis module.

Creating or Modifying Change Request Fields

You create new change request fields and modify existing ones in the Administration module's Fields tab.

To create or modify change request fields:



- 1** Click the **Add Field** button to create a new field, or select an existing field that you want to modify.

There are two types of change request fields that appear in the Available Fields pane:



- **Predefined fields.** Fields based on ITIL standards, which are common to most service desk applications. Some of these fields are integral to the proper functioning of the HP Release Control application and you therefore cannot remove predefined fields or change their basic properties. The only aspect of these fields that is customizable is the way in which they appear in your application.



- **Custom fields.** Fields that are recommended for use in order to optimize HP Release Control analysis features, or any new fields added by users. These fields can be changed or deleted.

Note: The data for these fields can originate from the service desk or from HP Release Control

- 2** In the **Field Definition** tab, define or modify basic properties of the field.

Note: You cannot change the name or type of an existing field. Instead, you can delete the existing field, save your settings, and then recreate a new field, with a different name, based on the same properties.

You can define the following properties:

Property	Description
Name	<p>The name used to define the field for various configuration purposes. This is not the name that appears in the application.</p> <p>If you are defining a customized field, the name should be unique and in the format [a-zA-Z][a-zA-Z0-9-]*. The name is not case-sensitive.</p> <p>Once a new field has been saved, its name cannot be modified.</p> <p>Note that when you define a customized field (except for fields of type Long Text), a new column is added to the HP Release Control database for this field. Data for Long Text fields is stored in a different table.</p>
Label	<p>The text to appear in each location in which the field appears. By default, the value entered here appears in the List Layout tab's Header box, in the Details Layout tab's Label box, and in the Filter Layout tab's Label box. You can modify the value in each of these boxes.</p>
Description	<p>A short description of the field that serves to remind administrators about the usage of the field. The field's description does not appear anywhere in the application.</p>

Property	Description
Type	<p>The field's value type. The following value types are available:</p> <ul style="list-style-type: none"> ➤ Short Text. The request field's value is a simple text string, up to 64 characters. ➤ Long Text. The request field's value is a simple text string with an unlimited number of characters. Note that fields of this type cannot be displayed in the List view and you cannot sort or filter according to this field. ➤ Boolean. The request field's value is boolean (true/false; yes/no; 1/0). ➤ Date. The request field's value is a date. ➤ Numeric. The request field's value is a numeric string.
Category	<p>The filter category in which the customized field is to be included. To create a new category, type a unique category name in the Category box. The category name is not case-sensitive. The new category is automatically added in the Available Fields pane.</p> <p>Note: You cannot include a customized field in the Business or Union Filters filter categories.</p>
Sample value	<p>Enables HP Release Control to display a preview of the field, with the sample value, in the Preview pane's List tab and/or Details tab. Note that you will see a preview only if you configure the field to be displayed in the Analysis module's List view and/or Preview > Details tab (in the List Layout or Details Layout tabs).</p>
Listable (not editable)	<p>Indicates whether the selected field is of a type that can be displayed in the Analysis module's List view. This check box is not editable.</p>
Sortable	<p>Indicates whether HP Release Control can sort according to the selected field.</p> <p>The only fields that can be made sortable are those that can be displayed in the Analysis module's List view. If a field cannot be displayed in the List view, the Sortable option is disabled.</p>
Filterable	<p>Indicates whether the field is to be used as one of the filter criteria. In the Filter Layout tab, you define the way in which the field should appear in the Filter dialog box.</p>

- 3** If the **Listable** check box in the Field Definition tab is selected, click the **List Layout** tab to define the way in which the field will appear in the Analysis module's List view. You can define the following properties:

Property	Description
Header	The text to appear in the header of the column in which the change request field value is to be displayed.
Header tooltip	The text of the tooltip that will appear when you hold your cursor on the column header. If this element is left unspecified, the name of the header is displayed as the tooltip.
Value display type	The display type of the value in the list view. The display options that are available depend on the field type you defined in the Field Definition tab. The following display types are available: <ul style="list-style-type: none"> ➤ Short Text. The value is displayed as simple text. ➤ Boolean. The value is displayed as a check box (supports true/false, yes/no, and 1/0). ➤ Date. The value is displayed as a date. You customize the way the value appears in the Value display format box.
Value display format	The format in which the field will appear. For information about valid formats for each value display type, see "Valid Display Formats" on page 68. Note: You cannot define a value display format for Boolean value display types.
Tooltip display type	The display type of the tooltip describing the selected field. The display options that are available depend on the field type you defined in the Field Definition tab. The following display types are available: <ul style="list-style-type: none"> ➤ Short Text. The value is displayed as simple text. ➤ Date. The value is displayed as a date. You can use the value tooltip to describe the information that appears in the List view in a different way. You use the Tooltip display format box, described below, to customize the way in which the tooltip display type appears.

Property	Description
Tooltip display format	The text and format of the tooltip that will appear when you hold your cursor over the field value. For information about valid formats for each value type, see “Valid Display Formats” on page 68.
Resizable	Indicates whether the column width is adjustable. For more information about resizing columns, see “Customizing the List View” on page 70.
Show in List view	Indicates whether the field should be displayed in the Analysis module’s List view. Note: If you select Show in List view , the Preview pane displays a preview of the way in which the field will appear in List view. To see how a sample value is displayed, type a sample value in the Field Definition tab’s Sample value box.




- 4** Click the **Details Layout** tab to define the way in which the field will appear in the Analysis module’s Preview > Details tab. You can define the following properties:

Property	Description
Label	The text to appear as the label preceding the displayed field value in the Preview > Details tab.

Property	Description
Value display type	<p>The display type of the field value in the Preview > Details tab. The display options that are available depend on the field type you defined in the Field Definition tab. The following display types are available:</p> <ul style="list-style-type: none"> ► Short Text. The value is displayed as simple text, adjacent to the label. ► Long Text. The value is displayed as simple text, underneath the label. Where necessary, the text will wrap. ► Boolean. The value is displayed as a check box (supports true/false, yes/no, and 1/0). ► Date. The value is displayed as a date. ► Link. The value of the current field is displayed as a link. The link leads to a different field, which contains a URL. <p>You customize the way the value appears in the Value display format box.</p>
Value display format	<p>The format in which the field will appear. For information about valid formats for each value display type, see “Valid Display Formats” on page 68.</p> <p>Note: You cannot define a value display format for Boolean or Long Text value display types.</p>
Tooltip	<p>The text of the tooltip that will appear when you hold your cursor over the label.</p>
Show in Details tab	<p>Indicates whether the field should be displayed in the Analysis module’s Preview > Details tab.</p> <p>Note: If you select Show in Details tab, the Preview pane displays a preview of the way in which the field will appear in the Preview > Details tab. To see how a sample value is displayed, type a sample value in the Field Definition tab’s Sample value box.</p>

- 5** If the **Filterable** check box in the Field Definition tab is selected, click the **Filter Layout** tab to define the way in which the field will appear in the Filter dialog Box. You can define the following properties:

Property	Description
Label	The text to appear as the label preceding the displayed field value in the Filter Dialog Box.
Tooltip	The text of the tooltip that will appear when you hold your cursor over the label.
Value display type	<p>Determines the way in which the selected field will operate as a filter. The display options that are available depend on the field type you defined in the Field Definition tab.</p> <p>The following possible options exist:</p> <ul style="list-style-type: none"> ➤ Numeric. Users can filter by specific numbers. ➤ Numeric Range. Users can filter by a numeric range. If you select this option, you need to specify the range in the relevant boxes below the Value display type list. ➤ Date. Users can filter by date. The option to filter fields of type date is only available in the Analysis module. ➤ Boolean. Users can filter by boolean value. You assign a label to each boolean value in the 'True' Label and 'False' Label boxes below the Value display type list. These are the labels that will appear in the Filter Dialog Box. ➤ Short Text. Users enter a string that matches the filter value. An asterisk (*) can be used to match a string to several possible values. (For example, if you use the string Da*, both David and Danny will match.) ➤ Single Selection. Users can select only one filter value option from a drop-down list box. ➤ Multi Selection. Users can select multiple filter value options from a drop-down list box. ➤ Editable Selection. Users can either select filter value options from a drop-down list box or enter a string that matches the filter value.

Property	Description
Value display type (cont'd)	<p>If you select Single Selection, Multi Selection, or Editable Selection from the Value display type list, choose one of the following two options:</p> <ul style="list-style-type: none"> ➤ Define possible values. Enables you define the values you want the drop-down list box to contain, as well as the way in which you want each value to be displayed. For information on defining values, see the instructions below. ➤ Get existing values. Instructs HP Release Control to get the values to be displayed in the drop-down list box directly from the database. <p>If you select Define possible values, you must define the filter value options you want the drop-down list box to contain.</p> <p>To add a filter value option:</p> <ol style="list-style-type: none"> 1 Click the Add Filter Value button . 2 In the boxes below the table, enter the value of the option in the Value column and the way in which you want the value to be displayed in the Display column. 3 To change the order in which the filter values will appear in the drop-down list box, select the relevant filter value and click the Move Up or Move Down button . <p>To delete an option:</p> <ul style="list-style-type: none"> ➤ Select the option and click the Delete Filter Value button .
Show in Analysis Filter	Indicates whether the field will appear as one of the filter criteria in the Analysis module.
Show in Director Filter	Indicates whether the field will appear as one of the filter criteria in the Director module.

- 6 To apply analysis rules to the change request field, click the **CI Analysis Rules** tab. These are the rules according to which you want HP Release Control to identify the location and format of CIs contained in the field's text.

You can apply analysis rules to change request fields of type **Short Text** or **Long Text**. We recommend that you apply analysis rules to change request fields that contain CIs only, without additional text comments.

For information about how to apply analysis rules to the change request fields, see “Applying Analysis Rules to Fields” on page 160.

- 7 Ensure that you are satisfied with your Fields tab settings. Before you save your settings, you can undo any changes you made by clicking the **Refresh and Undo Modifications** button in the Available Fields pane. This restores the fields to their most recently saved settings.



To save your changes and commit these changes to the server, click the **Save Settings for All Fields** button in the Available Fields pane. A message opens asking you to confirm that you want to save these changes. Once you save these changes, they cannot be undone. Click **Yes** to save the changes.



The save process can take a few minutes, during which time users cannot log in to HP Release Control. Once the changes have been saved, users logging in to HP Release Control will view the new changes.

If any field is invalid, you cannot save your changes. When you try save your changes, you receive an error message informing you to fix the invalid fields. If a field is invalid, an icon is displayed in the Available fields pane next to the invalid field and the relevant category.



Note: After you have updated your adapter conversion scripts with the new fields that you created or modified, you can apply these updates to your adapter by clicking the **Reload Adapters** button.



Valid Display Formats

In the Fields tab, there are a number of places where you must define the format in which a specific field will appear. For each display type, a different display format applies. The following table describes valid formats for each display type:

Display Type	Display Format
Short Text	<p>If you selected Short Text as the display type, you can include parameters that contain the names of defined fields. Each field must contain two percentage signs on either side of it.</p> <p>For example, if you defined your display format as Please contact %%contact-person%%, the parameter %%contact-person%% would return the name of the contact person for the request (from the contact-person field).</p> <p>If you leave the format box empty, the value of the field will be displayed as is.</p>
Date	<p>If you selected Date as your display type, you can specify the way in which the date should be displayed by making use of letter patterns containing the following letters:</p> <ul style="list-style-type: none">➤ Y. Year➤ M. Month➤ D. Day in the month➤ E. Day of the week➤ A. AM/PM indicator➤ J. Hour of the day (0-23)➤ H. Hour of the day (1-24)➤ K. Hour in the AM/PM (0-11)➤ L. Hour in the AM/PM (1-12)➤ N. Minute in the hour➤ S. Second in the minute <p>For example, to display Sat 04 Mar 2006 09:43AM, you would use the following date format:</p> <p>EEE DD MMM YYYY LL:NNA</p>

Display Type	Display Format
Link	<p>If you selected Link as your display type, you must specify the name of a field that contains a URL. You enter the field as a parameter that contains the name of the field, surrounded by two percentage signs on each side of the field (%%field_name%%).</p> <p>The value displayed for this format is the value of the current field (not the field that contains the URL) and the tooltip of this value is the URL. Clicking on the field leads you to the URL destination.</p>

Note: You cannot define a display format for **Boolean** or **Long Text** display types.

Deleting a Change Request Field



You can delete Custom fields that are provided by HP Release Control or manually added by the user. However, you cannot delete fields that are being used in risk factor or time period definitions.



Predefined fields, which are integral to the proper functioning of the HP Release Control application, cannot be deleted.

Important: When you delete a change request field, all data related to the field is removed.

To delete a change request field:

- 1 In the Administration module's **Fields** tab, select the field that you want to delete.



- 2 Click the **Delete Field** button in the Available Fields pane. A message opens asking you to confirm that you want to delete this change request field.

3 Click **Yes** to confirm.



Note: The field is only deleted once you save your field setting changes (see step 7 on page 67 for instructions on saving your settings). Before you save your field settings, you can still undo the delete action by clicking the **Refresh and Undo Modifications** button in the Available Fields pane. This restores the fields to their most recently saved settings.

Customizing the List View

In the Administration module's Fields tab, you can customize the layout of the Analysis module's List view.

To customize the List view:

In the Preview pane, select the **List** tab. A preview of the fields for which you selected **Show in List view** (in the List Layout tab) are displayed.

You can customize the following:

- The width of the columns. To adjust the column width, rest the cursor on the column boundary you want to move until it becomes a resize pointer, and then drag the boundary until the column is at the required width. Note that you can adjust the width of the column only if you selected **Resizable** for the selected column in the List Layout tab.
- The order of appearance of the columns. You can move the columns to the left or to the right by selecting the relevant column header and clicking either the **Move Column Right** or **Move Column Left** button.
- The column by which the List view should be sorted by default. To sort the List view according to a specific column, click the relevant column heading twice. An arrow is displayed next to the column header to indicate that the List view is sorted by this column. To change the sorting order, click the column heading again. The arrow points in the opposite direction. Note that you can select a column to sort by only if you selected **Sortable** for the column in the List Layout tab.



Customizing the Preview > Details Tab

In the Administration module's Fields tab, you can customize the layout of the Analysis module's Preview > Details tab.

To customize the Preview > Details tab:

In the Preview pane, select the **Details** tab. A preview of the fields for which you selected **Show in Details tab** (in the Details Layout tab) is displayed.

You can perform the following:

► Add or remove columns.



You can add additional empty columns to be displayed in the Preview > Details tab. To add a new column, click the **Add Column** button. An empty column is added on the right. You can then move different fields to the new column as explained below.



To delete a column, select the relevant column by clicking inside the column—but not on a particular field—until the whole column is highlighted. Click the **Remove Column** button. The fields that were included in this column move over to another column.

► Change the order of appearance of the fields.



To move the field to a different column, select the relevant field and click the **Move Right** or **Move Left** button.



To move the fields up or down within the columns, select the relevant field and click the **Move Up** or **Move Down** button.

5

Configuring the Conversion of Requests

This chapter describes how to convert change requests that originate in various service desk applications to generic requests that can be processed by HP Release Control. It also describes how to customize HP Release Control fields.

This chapter includes:

- Customizing HP Release Control Fields on page 74
- About Converting Requests on page 76
- Overview of Adapter Configuration on page 78
- Location and Naming Conventions of Service Desk Integration Files on page 79
- Configuring the Common Adapter Attributes on page 80
- Configuring the Connector Attributes on page 87
- Configuring the Converter Attributes on page 113
- Writing the Conversion Scripts on page 114

Customizing HP Release Control Fields

Before you can begin converting service desk application requests to HP Release Control requests, you must define the fields you want to include in your HP Release Control requests. These include both standard ITIL, predefined fields and customized fields, which you define in the Fields tab of the HP Release Control application's Administration module. For details on customizing fields, see "Configuring Change Request Field Settings" on page 57.

In addition, you must define the enumeration fields to be used by HP Release Control in the **<HP Release Control installation directory>\conf\enumerations.settings** file. The **enumerations.settings** file contains a default list of the following:

- status levels
- priority levels
- request (parent/child) levels
- severity levels
- estimated risk levels
- voting options
- request types (a classification of requests that assists HP Release Control in matching actual changes in your environment with scheduled changes)
- action item priority levels

The numeric values determine the order in which the enumeration levels are displayed in the HP Release Control application. You can modify all of the settings in this file as required, except for the request level settings. For example, if you want HP Release Control to use the status **Completed** instead of **Closed**, you would change the following:

```
<entry>
  <name>CLOSED</name>
  <value>4</value>
</entry>
```

to:

```
<entry>
  <name>COMPLETED</name>
  <value>4</value>
</entry>
```

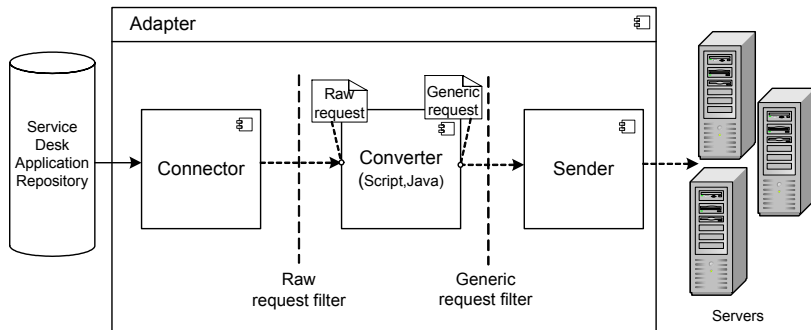
Notes:

- After the HP Release Control server is launched, an **<id>** element is added to each enumeration entry. This element should not be modified or removed.
 - If you add or modify an enumeration setting, you must configure the way in which the enumeration setting is displayed in the HP Release Control application. You do so within the **<HP Release Control installation directory>\conf\enumeration-labels.properties** file. For details on configuring the **enumeration-labels.properties** file, see “Configuring Enumeration Field Display Settings” on page 279. If you do not configure the way in which the enumeration setting is displayed, a warning message is recorded in the HP Release Control log files.
 - If you modify an enumeration setting, all the conversion scripts that refer to this enumeration setting must be modified accordingly. For details on referring to enumeration settings within conversion scripts, see “Writing the Conversion Scripts” on page 114. If you modify the way in which the enumeration setting is displayed in the HP Release Control application, you need not modify your conversion scripts.
 - If you add or modify a severity enumeration setting, you must modify the corresponding severity enumeration setting in the **<HP Release Control installation directory>\conf\mam-integration.settings** file. For details on configuring the impact severity level settings in the **mam-integration.settings** file, see “Mapping HP Release Control–HP Universal CMDB Severity Levels” on page 128.
-

About Converting Requests

Change requests are converted from their service desk application formats to a generic format using service desk application-specific adapters. The generic requests are then organized according to their original change/task (top-level/second-level) hierarchy and transferred to the HP Release Control server.

The following diagram illustrates the service desk application request conversion process performed by the Service Desk Integration module:



Each service desk application-specific adapter contains two single-level adapters—one to convert top-level changes, and the other to convert second-level changes. As shown above, each single-level adapter contains the following three subcomponents:

- **Connector.** Collects new top-level/second-level change requests from the service desk applications.
- **Converter.** Converts the top-level/second-level change requests from their service desk application formats to a generic format that HP Release Control can recognize.
- **Sender.** Organizes the converted top-level/second-level change requests according to their original parent/child hierarchy and transfers them to the HP Release Control server.

Each single-level adapter also contains a **pre-conversion filter** and a **post-conversion filter**. Using these filters, you can control which requests are sent to the HP Release Control server. The pre-conversion filter filters requests before they are converted to a generic format, while the post-conversion filter filters requests after conversion, but before they are transferred to the HP Release Control server.

The Service Desk Integration module supports the following service desk applications:

Application	Version
BMC Remedy Action Request System	5.0
HP Project and Portfolio Management/ Mercury IT Governance Center	<ul style="list-style-type: none"> ➤ 6.0 Service Pack 14 – Web Services ➤ 7.0 – Web Services ➤ 7.1 – Web Services ➤ 5.5 – RML (RML must be enabled)
HP Service Manager (Service Center) Note: The HP Service Manager 7.0 adapter replaces the previous HP Service Center 6.x adapter, and allows integration with both HP Service Center 6.x and HP Service Manager 7.0	<ul style="list-style-type: none"> ➤ 7.0 ➤ 6.1 Service Pack 1 ➤ 6.2
HP Service Desk	4.5
HP Server Automation	7.1
HP Network Automation	7.0

Overview of Adapter Configuration

To convert service desk application requests using the Service Desk Integration module, you must configure the appropriate adapter for each service desk application.

To configure an adapter, you must:

- set up the adapter configuration file
- write the conversion scripts to be used by the adapter

Note: You can configure more than one adapter per service desk application. This enables you to import requests from several servers of the same service desk application.

Adapter Configuration File

The adapter configuration file is an XML file that contains the following:

- The adapter attributes, such as the adapter name, the name of the service desk application in which the requests were created, the number of requests to be processed at one time, the frequency with which the adapter polls the service desk application, and the request types to be converted.

For details on configuring the adapter attributes, see “Configuring the Common Adapter Attributes” on page 80.

- The connector attributes, which enable the adapter to connect to the service desk application. You specify the connector attributes separately for each single-level adapter—that is, for each request type included in the adapter configuration file.

For details on configuring the connector attributes, see “Configuring the Connector Attributes” on page 87.

- The converter attributes, which call the conversion script files where the field mapping and filter functions are defined. The converter attributes differ for each single-level adapter.

For details on configuring the converter attributes, see “Configuring the Converter Attributes” on page 113.

Conversion Scripts

Conversion scripts are called by the adapter and are responsible for the actual conversion of change requests from their service desk application format to a generic format.

Each script must contain certain functions. For a detailed list and explanation of these functions, see “Writing the Conversion Scripts” on page 114.

Location and Naming Conventions of Service Desk Integration Files

The Service Desk Integration files are located in the subdirectories within the **<HP Release Control installation directory>\examples\service-desk-examples** directory. These subdirectories contain the following:

- A configuration file for each adapter. This file must have a **.settings** extension. In addition, it is recommended that the name of the configuration file be identical to the name defined for the adapter within the configuration file, as follows:

```
<adapter name>.settings
```

For example, if the name defined for the adapter is **servicemanager-adapter**, the configuration file name should be **servicemanager-adapter.settings**.

- A subdirectory for each adapter configuration file. The subdirectory holds the conversion scripts responsible for the actual conversion of requests from their service desk application format to a generic format.

The name of the subdirectory must be identical to the name defined for the adapter in the configuration file and must have a **.ext** extension, as follows:

```
<adapter name>.ext
```

Following the example above, there must be a subdirectory called **servicemanager-adapter.ext** to hold all the conversion script files for the HP Service Manager adapter.

After you have properly named the adapter configuration file and subdirectory, you must copy both of these entities to the **<HP Release Control installation directory>\conf** directory.

Configuring the Common Adapter Attributes

The top section of the adapter configuration file contains the following adapter attributes, which are common to all service desk applications:

Property Name	Description	Default Value
adapter-name (mandatory)	A logical name that represents the adapter's name within the HP Release Control system. For example: servicemanager-adapter Note: This name is also used for the scripts (.ext) directory, as explained in "Location and Naming Conventions of Service Desk Integration Files" on page 79. In addition, this name is used to identify the adapter in the log files.	—
version (mandatory)	The version of the adapter, which is identical to the version of HP Release Control that you are using. Note: This property should not be modified.	—

Property Name	Description	Default Value
service-desk-application (mandatory)	<p>A unique, logical name for the service desk system that you are using. This can be any name you select.</p> <p>For example: Service Manager</p> <p>Note: This is the name that will be used for the service desk within the HP Release Control application.</p>	—

Property Name	Description	Default Value
number-of-tickets	<p>Sets the number of requests that are processed at a time, ensuring that HP Release Control and service desk application resources, such as memory and network bandwidth, are not over-used.</p> <p>The number-of-tickets can be as high as required, although you should be careful not to overload HP Release Control or your service desk application. It must be high enough to retrieve all requests from the service desk application and must exceed the expected number of requests that the service desk application updates in one measurement time slot. For example, if the service desk application updates 50 requests in one second, the number-of-tickets must exceed 50.</p> <p>In processing requests, HP Release Control attempts to use the number-of-tickets, but may return more or fewer requests from the service desk application.</p> <p>Note: To determine the number-of-tickets, consult with the people responsible for the service desk applications within your organization.</p>	50

Property Name	Description	Default Value
polling-schedules	<p>A list of cron expressions separated by the new line character.</p> <p>Format: 30 * * * * <new line> 0 * * * *</p> <p>For more information about cron expressions, see http://www.opensymphony.com/quartz/api/org/quartz/CronTrigger.html</p>	—
polling-frequency	The frequency (in seconds) with which the service desk application is polled for change requests.	If polling-schedules and polling-frequency are undefined, then the default is 30 seconds .
initial-load-state	<p>If you specify a string date, the adapter collects all requests from the specified creation date through the current date, at one time and does not continue to collect new or updated requests.</p> <p>Format: MM/dd/yy HH:mm:ss z</p>	null

Property Name	Description	Default Value
request-types (mandatory)	<p>Lists all request types that the adapter collects, including all request type levels. By default, level 1 is used for changes and level 2 is used for tasks. (For details on configuring request type levels, see “Customizing HP Release Control Fields” on page 74.)</p> <p>For an explanation of the request type properties and operation properties to be included as part of the <request-type> element, see “Request Type Properties” on page 85.</p>	—
sender	<p>Specifies where requests should be sent.</p> <p>In the <sender> section, you specify where requests should be sent by setting the <sender-type> element to one of the following values:</p> <ul style="list-style-type: none"> ➤ sender. Requests are sent to the HP Release Control server. ➤ xmlSender. Requests are sent to XML files (used for debugging) rather than the HP Release Control server. 	sender

Request Type Properties

The <request-type> element includes the following properties:

Property Name	Description	Default Value
connection-properties	Lists the common properties for polling and operation connectors so that these properties do not have to be duplicated.	—
connector (under polling-operation) (mandatory)	Includes the connector-type and connector properties . To configure the connector-type and its properties , refer to the documentation for the specific service desk application (see “Configuring the Connector Attributes” on page 87).	—
converter (under polling-operation) (mandatory)	Includes the converter-type and converter properties . The converter properties are defined within a script.	—

The **<operation>** element (under **<operations>** within **<request-type>**) includes the following operation properties:

Property Name	Description	Default Value
name (mandatory)	The operation name to be used in locating the operation. The following operations are currently supported: <ul style="list-style-type: none">➤ canApprove➤ approve➤ canRetract➤ retract For details on these operations, see Chapter 17, “Configuring Change Request Approval.”	—
operation-type (mandatory)	Defines the type of operation to be performed.	—
connector (under operation) (mandatory)	Defines the operation connector to be used for the execution of the operation.	—
sender-properties	Overrides the default properties that are used when initializing a sender for the operation.	—

Note: For examples of **<request-type>** configuration, see the **.settings** files within the subdirectories of the **<HP Release Control installation directory>\examples\service-desk-examples** directory.

Configuring the Connector Attributes

The connector attributes, which enable the adapter to connect to the service desk application, differ according to the service desk application from which you are converting requests.

Note: You must specify the connector attributes separately for each request type included in the adapter configuration file.

This section describes:

- “BMC Remedy Action Request System Connector Settings” below
- “XML Connector Settings” on page 89
- “HP Service Manager (ServiceCenter) Connector Settings” on page 91
- “HP Service Desk Connector Settings” on page 98
- “HP Project and Portfolio Management/Mercury IT Governance Center Web Services Connector Settings” on page 99
- “IT Governance Center RML Connector Settings” on page 101
- “HP Server Automation Connector Settings” on page 104
- “HP Network Automation Connector Settings” on page 105
- “Database Connector Settings” on page 107
- “Oracle Database Connector Settings” on page 111

BMC Remedy Action Request System Connector Settings

To connect to the BMC Remedy Action Request System service desk application, you must first ensure that certain BMC Remedy Action Request System files are accessible to the HP Release Control server.

- Copy **arapi50.dll**, **arjni50.dll**, **arrpc50.dll**, and **aruti50.dll** from the BMC Remedy Action Request System installation directory to an arbitrary directory on the HP Release Control server machine. Set the **PATH** environment variable to point to this directory.

- Copy **arapi50.jar** and **arutil50.jar** from the BMC Remedy Action Request System installation directory to the <Tomcat server installation directory>\common\lib directory.

The following connector attributes must then be configured in the BMC Remedy Action Request System adapter configuration file (by default, **remedy-adapter.settings**):

Property Name	Description	Default Value
connector-type (mandatory)	The logical name of the adapter. This must be set to remedy .	—
serverName (mandatory)	The name of the BMC Remedy Action Request System server.	—
serverTcpPort	The TCP port of the BMC Remedy Action Request System server.	0
serverRpcNum	The RPC number of the BMC Remedy Action Request System server.	0
userName (mandatory)	The user name with which HP Release Control connects to the BMC Remedy Action Request System server.	—
userPassword (mandatory)	The password with which HP Release Control connects to the BMC Remedy Action Request System server. Note that the password should be encrypted. For details on encrypting passwords, see Appendix A, “Password Encryption.”	—
schemaName (mandatory)	The name of the schema containing the required change requests.	—
field-names (mandatory)	A comma-separated list of request fields to retrieve. Use * to collect all request fields.	—

XML Connector Settings

The following XML connector attributes must be configured in the XML adapter configuration file (by default, **demo-xml-adapter.settings**):

Property Name	Description	Default Value
connector-type (mandatory)	This must be set to: xmlFolderWatcher	—
idPropertyName (mandatory)	The property name of the request's ID in each XML file to which service desk application requests are sent.	—
creationDatePropertyName (mandatory)	<p>The property name of the request's creation-date value in the XML file.</p> <p>If the creation-date is an XML element, use the element's name. For example, you would use the property name creation-date for the following:</p> <pre><change-request> <creation-date>01/01/01</creation-date> </change-request></pre> <p>If the creation-date is an attribute of the request's XML element, use @<element name>. For example, you would use the property name @creation-date for the following:</p> <pre><change-request creation-date="01/01/01"> </change-request></pre>	—
dateFormat (mandatory)	The format of the creation-date value in the XML file.	—

Property Name	Description	Default Value
directoryName (mandatory)	The path of the shared directory in which the service desk application requests are placed in XML file format.	—
pattern	The file name pattern as a regular expression. For more details, see http://java.sun.com/j2se/1.4.2/docs/api/java/util/regex/Pattern.html	No pattern - all files will be read.

Note: Ensure that the HP Release Control user has read permissions to the directory in which the service desk application requests are placed in XML file format.

HP Service Manager (ServiceCenter) Connector Settings

The following HP ServiceCenter/Service Manager connector attributes must be configured in the HP ServiceCenter/Service Manager adapter configuration file (by default, **servicemanager-ws-adapter.settings**):

Note: If HP Service Manager is tailored with IIA (ITSM Implementation Accelerator), use the service desk integration files located in the <HP Release Control installation directory>\examples\service-desk-examples\ServiceManager\<version number> IIA directory.

Property Name	Description	Default Value
connector-type (mandatory)	For top-level requests, this must be set to ServiceCenterChange if you are working with HP ServiceCenter, and ServiceCenterSM7Change if you are working with HP Service Manager. For second-level requests, this must be set to ServiceCenterTask if you are working with HP ServiceCenter, and ServiceCenterSM7Task if you are working with HP Service Manager.	—
idProperty (mandatory)	The property name of the ID field in the instance returned from the HP Service Manager Web service.	—
lastUpdatedPropertyForQuery (mandatory)	The property name of the last-update field used to query the HP Service Manager Web service (the field name used in an expert search on the HP Service Manager client machine).	—
creationDatePropertyForQuery (mandatory)	The property name of the creation-date field used to query the HP Service Manager Web service.	—

Property Name	Description	Default Value
lastUpdatedPropertyForResult (mandatory)	The property name of the last-update field in the instance returned from the HP Service Manager Web service (usually the field name exposed as API).	—
creationDatePropertyForResult (mandatory)	The property name of the creation-date field in the instance returned from the HP Service Manager Web service.	—
keyMethodName (mandatory)	The name of the method for request keys (usually the ID field name).	—
timeZone (mandatory)	The HP Service Manager server time zone, used for converting the last updated time of a request from HP Service Manager. Note: To handle Daylight Savings Time, use an area time zone instead of specifying a time relative to GMT.	—
wsDateFormatPattern (mandatory)	The date format used in the HP Service Manager Web service answer. For available formats, see: http://java.sun.com/j2se/1.4.2/docs/api/java/text/SimpleDateFormat.html	—
queryDateFormatPattern (mandatory)	The date format used for querying the HP Service Manager system (as used in the UI expert search). For available formats, see: http://java.sun.com/j2se/1.4.2/docs/api/java/text/SimpleDateFormat.html	—
serviceUrl (mandatory)	The Web service URL.	—

Property Name	Description	Default Value
userName (mandatory)	The user name with which HP Release Control connects to the HP Service Manager system.	—
password (mandatory)	The password with which HP Release Control connects to the HP Service Manager system. Note: The password should be encrypted. For details on encrypting passwords, see Appendix A, “Password Encryption.”	—
workingBulkAllowedDeviation	The permitted percentage of deviation from the specified working bulk (number of tickets imported from the service desk).	20
additionalConstraintsForInitialLoad	An additional filter criteria to allow more flexibility in what changes are fetched in initial load. The syntax for this constraint is the same as the one used by HP Service Manager’s Expert Search. Note: This is implemented by appending a & (<constraint>) to the HP Service Manager query.	
additionalConstraintsForPolling	An additional filter criteria to allow more flexibility in what changes are fetched in the polling mode. The syntax for this constraint is the same as the one used by HP Service Manager’s Expert Search. Note: This is implemented by appending a & (<constraint>) to the HP Service Manager query.	

Exposing HP Service Manager Fields

To enable communication between HP Service Manager and HP Release Control, you need to expose specific HP Service Manager fields.

To expose fields in HP Service Manager:

1 Expose the change fields.

- a** From the HP Service Manager navigation menu, double-click **Tailoring > WSDL Configuration**.
- b** In the name box, type cm3r.
- c** Press ENTER.
- d** In the **Fields** tab, add the following HP Service Manager fields:

Field	Caption
sysmodtime	sysmodtime
header,orig.date.entered	origDateEntered

- e** Click **Save**.

2 Expose the Task fields.

- a** From the HP Service Manager navigation menu, double-click **Tailoring > WSDL Configuration**.
- b** In the name box, type cm3t.
- c** Press ENTER.
- d** In the **Fields** tab, add the following HP Service Manager fields:

Field	Caption
sysmodtime	sysmodtime
header,orig.date.entered	origDateEntered
header,priority.code	priority
header,approval.status	approvalStatus
header,risk.assessment	riskAssessment

Field	Caption
middle,asset	asset
actualStart	actualStart
actualEnd	actualEnd

e Click **Save**.

3 Regenerate the Web Services JAR file

Each time you modify these settings, a new WSDL is created and you must regenerate the Web Services stub (.jar) file from the new WSDL.

- a Locate the **create-servicecenter-jar.bat** script in the <HP Release Control installation directory>\utilities\servicecenter-wsdl-generator directory and activate it using the following command:

```
create-servicecenter-jar <WSDL URL>
```

- b Copy the **servicecenter-changeRequestClient.jar** file from the <HP Release Control installation directory>\utilities\servicecenter-wsdl-generator directory to the <HP Release Control installation directory>\tomcat\webapps\ccm\WEB-INF\lib directory.

Generating an HP Service Manager (ServiceCenter) URL

To enable HP Release Control to link to a change request in HP Service Manager, you must configure HP Service Manager to provide the URL link. The HP Service Manager configuration procedure differs depending on whether HP Service Manager is deployed with additional security for URL queries.

Using a Non-Secure Query

If no URL security mechanism is in place, you add the following URL:

```
http://<HP Service Manager Web application URL>/index.do?ctx=docEngine
&amp;file=cm3r&amp;query=number=%22%%<request-id%>%22
```

to the HP Service Manager request conversion script, as follows:

```
genericRFC.setField("origin-url", <URL>);
```

When defining the **Value type** of the field from whose display in the Request Details tab you want to link to the original HP Service Manager request, select **Link** and define `%%<request-id%>%` as the **Value format**. For details, see step 4 on page 63.

Using a Secure Query

If a URL security mechanism is in place, the URL query must contain a hash (generated by HP Service Manager) that is dependent on both the HP Service Manager Web server's name and the query.

To generate a secure URL query:

- 1** Add a new change request field that contains a URL linking to the change request itself. This configuration should be performed by the HP Service Manager administrator.
 - a** Add the field to requests using **System Definition > Tables > cm3r/cm3t > Fields**.
 - b** Include the field in the HP Service Manager request conversion script so that the field will be included in the requests that are converted to HP Release Control.
- 2** Create a trigger that will generate the URL within this field when a change request is created or modified.
 - a** Select **Utilities> Tools > Document Engine> Objects**.
 - b** Locate the **cm3r** object.
 - c** Add the following to the object table:

```
add: true
update: true
calculation [all in the same row]:
$query="number=\""+number in $file+"\"";$title="Change Request Details";
url in $file=jsall("urlCreator.getURLFromQuery", "cm3r", $query, $title)
```

- d** Save your modifications to the object table.

- 3 Check the exact machine name (**My Computer > Properties > Computer Name**) and ensure that the exact machine name (which is case-sensitive) is properly defined in the following places:
 - On the HP Service Manager client machine, select **Utils > Admin > Info > System Information Record** and click the **Active** tab. Ensure that the Web server URL (<http://<Web server name:port>/sc/index.do>) is properly defined.
 - In the Web server's **web.xml** file, ensure that the Web server URL is properly defined under the **sc.host** property.

The URL is automatically generated when a change request is created or updated.

Note:

- You must regenerate the Web Services stub (**.jar**) file from the new WSDL as described above.
 - Map the URL field you created to an HP Release Control field in the HP Service Manager conversion script. In HP Release Control, define the **Value type** of this field as **Link** and define **%%<request-id%>%** as the **Value format**. For details, see “Valid Display Formats” on page 68.)
-

HP Service Desk Connector Settings

The following HP Service Desk connector attributes must be configured in the HP Service Desk adapter configuration file (by default, **hpsd-adapter.settings**):

Property Name	Description	Default Value
connector-type (mandatory)	For top-level requests, this must be set to: hpsdChange For second-level requests, this must be set to: hpsdWorkOrder	—
idProperty (mandatory)	The property name of the ID field in the instance returned from HP Service Desk.	—
lastUpdatedProperty (mandatory)	The property name of the last-update field.	—
createdProperty (mandatory)	The property name of the creation-date field.	—
serviceUrl (mandatory)	The URL of the Web service. Format: [<HP Service Desk server IP address>:<HP Service Desk server port>] Note: The server port is generally 30999	—

Property Name	Description	Default Value
userName (mandatory)	The user name with which HP Release Control connects to HP Service Desk.	—
password (mandatory)	The password with which HP Release Control connects to HP Service Desk. Note: The password should be encrypted. For details on encrypting passwords, see Appendix A, “Password Encryption.”	—

HP Project and Portfolio Management/Mercury IT Governance Center Web Services Connector Settings

This section describes how to connect to the HP Project and Portfolio Management/IT Governance Center Web Services service desk application.

To connect to the HP Project and Portfolio Management/IT Governance Center Web Services service desk application:

- 1** Copy the contents of the <HP Release Control installation directory>\examples\ITG\6.0 to 7.1\conf directory to the <HP Release Control installation directory>\conf directory.
- 2** Copy the contents of the <HP Release Control installation directory>\examples\ITG\6.0 to 7.1\tomcat directory to the <HP Release Control installation directory>\tomcat directory.
- 3** In the <HP Release Control installation directory>\conf\itg-ws-adapter.ext directory:
 - Modify the LINK variable in the **convertChange** and **convertRelease** scripts to point to your HP Project and Portfolio Management/IT Governance Center server.
 - Modify these scripts to use the HP Project and Portfolio Management/IT Governance Center tokens that are relevant to your HP Project and Portfolio Management/IT Governance Center request types.

- 4** For each change request level (top-level and second-level), the following connector attributes must be configured in the HP Project and Portfolio Management/IT Governance Center Web Services adapter configuration file (by default, **itg-ws-adapter.settings**):

Property Name	Description	Default Value
connector-type (mandatory)	This must be set to: itg	—
requestTypeName (mandatory)	The name of the HP Project and Portfolio Management/IT Governance Center request type to be retrieved. Note that this field is case-sensitive.	—
parentRequestTypeName (mandatory, if the request is a second-level request with a parent request)	The name of the HP Project and Portfolio Management/IT Governance Center parent request type to be retrieved, if the request is a second-level request (meaning it has a parent request associated with it).	—
username (mandatory)	The user name with which HP Release Control connects to HP Project and Portfolio Management/IT Governance Center.	—

Property Name	Description	Default Value
password (mandatory)	The password with which HP Release Control connects to HP Project and Portfolio Management/IT Governance Center. Note that the password should be encrypted. For details on encrypting passwords, see Appendix A, “Password Encryption.”	—
serviceUrl (mandatory)	The URL of the HP Project and Portfolio Management/IT Governance Center Web service.	—

- 5** If your HP Project and Portfolio Management/IT Governance Center Web Services service desk application is synchronized with the CMDB server, add a new change request field named **mam-ticket-id** of type **text**. Apply the analysis rule **mam-ticket** to this field, with the analysis rule level set to both **Change** and **Task**.

For information about creating new change request fields and applying analysis rules, see “Creating or Modifying Change Request Fields” on page 59.

IT Governance Center RML Connector Settings

To work with the IT Governance Center RML adapter, you must first enable RML. For details on enabling RML when working with IT Governance Center, refer to the IT Governance Center documentation.

The following connector attributes must then be configured in the IT Governance Center RML adapter configuration file (by default, **itg-rml-adapter.settings**):

Property Name	Description	Default Value
connector-type (mandatory)	This must be set to: rmlItgConnector	—
dbUrl (mandatory)	The URL of the IT Governance Center database.	—
userName (mandatory)	The user name with which HP Release Control connects to the IT Governance Center database. Note: The HP Release Control user should have read permissions to the database schema.	—
password (mandatory)	The password with which HP Release Control connects to the IT Governance Center database. Note that the password should be encrypted. For details on encrypting passwords, see Appendix A, “Password Encryption.”	—
driverClassName	The name of the JDBC driver. Ensure that the driver exists in the <Tomcat server installation directory>\common\lib directory.	oracle.jdbc. OracleDriver

Property Name	Description	Default Value
sqlQueryByLastUpdate (mandatory)	The SQL query that returns the change request set according to the requests' last-update field values. Note: SQL queries must have one parameter which is the last-update field value. Query results must be sorted according to the last-update values.	—
sqlQueryByCreationDate (mandatory)	The SQL query that returns the change request set according to the requests' creation-date field values. Note: SQL queries must have one parameter which is the creation-date field value. Query results must be sorted according to the creation-date values.	—
lastUpdatedFieldName	The name of the column in the result set that contains the last-update field value.	LAST_UPDATE_ DATE
lastUpdatedFieldType	One of the following values: time , timestamp , date , milliseconds , or seconds	timestamp
creationDateFieldName	The name of the column in the result set that contains the creation-date field value.	CREATION_ DATE
creationDateFieldType	One of the following values: time , timestamp , date , milliseconds , or seconds	timestamp
idFieldName	The name of the column in the result set that contains the ID field value.	REQUEST_ ID

Property Name	Description	Default Value
dbHelper-class-name	The class name used for the db helper.	com.mercury.onyx.sdi.sdk.db.DBHelperImpl
connectionProperties	The IT Governance Center database properties, in java.util.Properties format. For example: key1=value1; key 2=value2	oracle.jdbc.V8 Compatible=true
connectionPoolProperties	The IT Governance Center database pool connection properties, in java.util.Properties format. For possible values, see: http://www.mchange.com/projects/c3p0/index.html	—
maxRowsToReturn	A limitation on the number of rows a request query should return. Not currently for use.	The working bulk size set in the adapter.

HP Server Automation Connector Settings

The following HP Server Automation connector attributes must be configured in the HP Server Automation adapter configuration file (by default, **sa-adapter.settings**):

Property Name	Description	Default Value
saServerUrl (mandatory)	The URL of the HP Server Automation server.	—
saUsername (mandatory)	A valid user name to access the HP Server Automation server.	—

Property Name	Description	Default Value
saPassword (mandatory)	A valid password to access the HP Server Automation server.	—
trustCertFile (mandatory)	The location of HP Server Automation's security certificate file. This file may be located at var/opt/opsware/crypto/coglib/opsware-ca.crt	—
filterRelevantJobs	A list of the types of jobs that are imported to HP Release Control. For more details, refer to the Opsware Automation Platform Developers Guide for search filter syntax.	All jobs of status Pending or Recurring .

HP Network Automation Connector Settings

If you are using version 6.6 of HP Universal CMDB, you must replace the `jbossall-client-6.6.jar` file located in **<HP Release Control installation directory>\tomcat\webapps\ccm\web-inf\lib** with the `jbossall-client-7.02ga.jar` file located in **<HP Release Control installation directory>\MAM\7.0\tomcat\webapps\ccm\WEB-INF\lib**.

The following HP Network Automation connector attributes must be configured in the HP Network Automation adapter configuration file (by default, `na-adapter.settings`):

Property Name	Description	Default Value
naServerURL (mandatory)	The URL of the HP Network Automation server.	—
naUsername (mandatory)	A valid User Name to access the HP Network Automation server.	—

Property Name	Description	Default Value
naPassword (mandatory)	A valid password to access the HP Network Automation server.	—
timeZoneString	The format for determining the time zone when converting requests located in a different timezone. To change this to a specific timezone, use the java naming conventions for time zones.	UTC
dateFormatString	The date and time format.	—
queryStatus	Tasks are imported only if they have one of the statuses listed in this tag.	
daysBefore	This number determines how many days before the current date tasks are imported from HP Network Automation. (for example, 14 means import all tasks scheduled up to 14 days before today).	
daysAfter	This number determines how many days after the current date tasks are imported from HP Network Automation. (For example, 7 means import all tasks scheduled up to 7 days after today.)	
excludeTaskTypes	A list of task types which will NOT be imported from HP Network Automation.	

Database Connector Settings

The following database connector attributes must be configured in the appropriate database adapter configuration file:

Property Name	Description	Default Value
connector-type (mandatory)	This must be set to: dbConnector	—
dbUrl (mandatory)	The URL of the database.	—
userName (mandatory)	The user name with which HP Release Control connects to the database.	—
password (mandatory)	The password with which HP Release Control connects to the database. Note that the password should be encrypted. For details on encrypting passwords, see Appendix A, “Password Encryption.”	—
driverClassName (mandatory)	The name of the JDBC driver. Ensure that the driver exists in the <Tomcat server installation directory>\common\lib directory.	—

Property Name	Description	Default Value
sqlQueryByLastUpdate (mandatory)	<p>The SQL query that returns the change request set according to the requests' last-update field values.</p> <p>To make use of a stored procedure, use the following syntax: { call <procedure_name> (?) }</p> <p>Note: Both SQL queries and stored procedures must have one parameter which is the last-update field value. Query results must be sorted according to the last-update values.</p> <p>If you are including customized SQL queries, see “Including Customized SQL Queries” on page 110.</p>	—
sqlQueryByCreationDate (mandatory)	<p>The SQL query that returns the change request set according to the requests' creation-date field values.</p> <p>To make use of a stored procedure, use the following syntax: { call <procedure_name> (?) }</p> <p>Note: Both SQL queries and stored procedures must have one parameter which is the creation-date field value. Query results must be sorted according to the creation-date values.</p> <p>If you are including customized SQL queries, see “Including Customized SQL Queries” on page 110.</p>	—

Property Name	Description	Default Value
lastUpdatedFieldName (mandatory)	The name of the column in the result set that contains the last-update field value.	—
lastUpdatedFieldType (mandatory)	One of the following values: time , timestamp , date , milliseconds , or seconds	—
creationDateFieldName (mandatory)	The name of the column in the result set that contains the creation-date field value.	—
creationDateFieldType (mandatory)	One of the following values: time , timestamp , date , milliseconds , or seconds	—
idFieldName (mandatory)	The name of the column in the result set that contains the ID field value.	—
dbHelper-class-name	The class name used for the db helper.	com.mercury. onyx.sdi.sdk. db. DBHelperImpl
connectionProperties	The database properties, in java.util.Properties format. For example: key1=value1; key 2=value2	Empty properties
connectionPoolProperties	The database pool connection properties, in java.util.Properties format. For possible values, see: http://www.mchange.com/projects/c3p0/index.html	—
maxRowsToReturn	A limitation on the number of rows a request query should return. Not currently for use.	The working bulk size set in the adapter.

Note: A sample database adapter configuration file, **sample-db-adapter.settings**, is available in the <HP Release Control installation directory>\examples\service-desk-examples\DB\SQL Server\conf directory.

Including Customized SQL Queries

If you add a customized SQL query that includes **greater than** or **less than** symbols, you need to insert the CDATA tag as illustrated in the example below:

```
<connector>
  <connector-type>dbConnector</connector-type>
  <properties>
    <![CDATA[
      dbUrl=jdbc:mercury:sqlserver://[Enter a valid MS SQL Server
      name]:1433;DatabaseName=[Enter a valid database
      name];sendStringParametersAsUnicode=false
      userName=sa
      password=
      driverClassName=com.mercury.jdbc.MercSQLServerDriver
      sqlQueryByLastUpdate={ SELECT crnum, lasteditdate,
      createdate FROM ecmschase WHERE lasteditdate >= ?
      AND rownum < 20 ORDER BY lasteditdate }
      sqlQueryByCreationDate={ call get_tickets_by_creation(?) }
      lastUpdatedFieldName=lastupdated
      creationDateFieldName= created_date
      creationDateFieldType= date
      idFieldName=id
      lastUpdatedFieldType=milliseconds
    ]]>
  </properties>
</connector>
```

Oracle Database Connector Settings

The Oracle database connector attributes are identical to the above database connector attributes, except for the following:

Property Name	Description	Default Value
connector-type (mandatory)	This must be set to: oracleDbConnector	—
sqlQueryByLastUpdate (mandatory)	<p>The SQL query that returns the change request set according to the requests' last-update field values.</p> <p>To make use of a stored procedure, use the following syntax: { ? = call <procedure_name> (?) }</p> <p>Note: Both SQL queries and stored procedures must have one parameter which is the last-update field value. Query results must be sorted according to the last-update values. Stored procedures should return a REF CURSOR type.</p>	—

Property Name	Description	Default Value
sqlQueryByCreationDate (mandatory)	<p>The SQL query that returns the change request set according to the requests' creation-date field values.</p> <p>To make use of a stored procedure, use the following syntax: { ? = call <procedure_name> (?) }</p> <p>Note: Both SQL queries and stored procedures must have one parameter which is the creation-date field value. Query results must be sorted according to the creation-date values. Stored procedures should return a REF CURSOR type.</p>	—
dbHelper-class-name	The class name used for the db helper.	com.mercury. onyx.sdi.sdk.db. OracleDB ConnectorHelper

Note: A sample Oracle database adapter configuration file, **sample-db-oracle-adapter.settings**, is available in the <HP Release Control installation directory>\examples\service-desk-examples\DB\Oracle\conf directory.

Configuring the Converter Attributes

The converter attributes, which call the conversion script files where the field mapping and filter functions are defined, must be configured separately for each request type included in the adapter configuration file.

You configure the following converter attributes in the adapter configuration file:

Property Name	Description	Default Value
converter-type (mandatory)	This must be set to: <code>scriptConverter</code>	—
scripts (mandatory)	A comma-separated list of script file names. The adapter searches for these files in the adapter's extension subdirectory (conf\<adapter name>.ext) or in the conf directory. For examples of conversion script files, see the sample scripts located in the subdirectories of the <HP Release Control installation directory>\examples\service-desk-examples directory.	—
preFilterMethodName	The name of the pre-filter method in the script.	preFilter
postFilterMethodName	The name of the post-filter method in the script.	postFilter
convertMethodName	The name of the convert method in the script.	convert

Note: If you specify method names, conversion script files can be shared by multiple adapters.

Writing the Conversion Scripts

Conversion scripts are responsible for the field mapping that occurs during the conversion of change requests from their service desk application format to a generic format, as well as for the filtering of requests.

Note: Ensure that no line within a script exceeds 256 characters.

In particular, it is important that the conversion scripts contain a detailed mapping scheme for the service desk application enumeration fields. Each HP Release Control enumeration field appears by default in the conversion scripts in the following format (upper case letters):

```
<enumeration field type>_<HP Release Control enumeration name>
```

For example:

```
genericRFC.setField("priority",PRIORITY_HIGH);
```

If a script refers to an enumeration field that does not exist, an error message is recorded in the script log file (see “Conversion Script Log Files” on page 116).

For details on customizing the HP Release Control enumeration fields to which the service desk application enumeration fields can be mapped, see “Customizing HP Release Control Fields” on page 74.

The functions that each script must contain are explained in detail below. For an explanation of the objects that can or should be included in each function, refer to the **GenericTicketImpl** class in the **API_Reference.chm** file, located in the **<HP Release Control installation directory>\documentation** folder.

- **convert.** This function maps the fields of the service desk application to generic request fields. Below is an example of the **convert** function:

```
convert(remedyRFC, genericRFC)
```

Note: For a list of preconfigured change request fields included in HP Release Control, see Appendix C, “Preconfigured Change Request Fields.”

- **preFilter.** This function filters the change requests before they are converted, ensuring that no unnecessary requests are converted and sent to the HP Release Control server. The function is written using the terminology of the service desk application. For example, if you do not want to convert requests with a **Low** priority, you could use the following **preFilter** function. This function specifies that BMC Remedy Action Request System requests with a **Low** priority not be converted and that all other requests be converted:

```
function preFilter(remedyRFC){
  if (remedyRFC.get("Request Urgency")==ARS_PRIORITY_LOW)
    return false;
  else
    return true;
```

- **postFilter.** This function filters the converted requests, ensuring that only required requests are transferred to the HP Release Control server. The function is written using HP Release Control request terminology. For example, the following **postFilter** function specifies that only generic requests with the status **Approved** be transferred to the HP Release Control server:

```
function postFilter(genericRFC){
  ccmStatus==genericRFC.get("status");
  if (ccmStatus==STATUS_APPROVED)
    return true;
  else
    return false;
```

Notes:

- If you are converting requests from HP Project and Portfolio Management/IT Governance Center, IT Governance Center RML, or a database service desk application, refer to all column names using lower case letters.
 - If you are converting requests from BMC Remedy Action Request System, IT Governance Center RML, or a database service desk application, it is recommended that you optimize network load and space consumption by converting only necessary request columns. Specify these columns in your SELECT query or using the relevant connector property.
 - You can use logging objects in the conversion scripts to log statements from the request conversion process. For details, see “Conversion Script Log Files” below.
-

Conversion Script Log Files

If you want to view log messages describing the activity taking place during the request conversion process, you can include logging objects in your conversion scripts. During the conversion process, you can view the log messages in the conversion script log files, located in the **<HP Release Control installation directory>\script-logs** directory.

A logging object can be included within any of the script functions. Its syntax should be as follows:

```
logger.<type of message>("<log message>");
```

The following message types can be used:

- **info.** Records all processing activity that is performed.
- **warn.** Records warning messages.
- **error.** Records error messages.

For example, you can include a logging object such as the following:

```
logger.info("converting request #3001");
```

If you want the conversion script log files to display a list of all service desk application fields, you can include the following logging object in your conversion script:

```
logger.info(BeanUtils.describe(ticket));
```

If you use the above logging object, ensure that the following line is included at the top of the conversion script:

```
importPackage(Packages.org.apache.commons.beanutils);
```


6

Configuring HP Universal CMDB-Related Settings

This chapter describes how to configure HP Release Control to work with HP Universal CMDB (formerly Mercury Application Mapping).

Note: This chapter uses HP Universal CMDB 7.0 terminology. Objects are therefore referred to as CIs and CI types as CITs.

This chapter includes:

- Overview of Configuring HP Universal CMDB-Related Settings on page 120
- Basic Configuration of HP Universal CMDB Settings on page 121
- Advanced Configuration of HP Universal CMDB - All Versions on page 124
- Advanced Configuration of HP Universal CMDB - Version 6.6 on page 129
- Advanced Configuration of HP Universal CMDB - Version 7.x on page 132

Overview of Configuring HP Universal CMDB-Related Settings

HP Universal CMDB is a database which contains the CIs, CITs, and their relationships. HP Release Control interacts with HP Universal CMDB in a number of different ways to obtain relevant calculations such as those regarding impact analysis. Certain settings must be configured for these functions to work properly. Other settings can be used to optimize the interactions between HP Release Control and HP Universal CMDB, for example configuring CI attribute detail displays.

- For information about configuration settings necessary for HP Universal CMDB to interact with HP Release Control see “Basic Configuration of HP Universal CMDB Settings” on page 121.
- For information about optional configuration settings relevant to all supported versions of HP Universal CMDB see “Advanced Configuration of HP Universal CMDB - All Versions” on page 124.
- For information about optional configuration settings relevant to version 6.6 of HP Universal CMDB see “Advanced Configuration of HP Universal CMDB - Version 6.6” on page 129.
- For information about optional configuration settings relevant to versions 7.0 and higher of HP Universal CMDB see “Advanced Configuration of HP Universal CMDB - Version 7.x” on page 132.

Basic Configuration of HP Universal CMDB Settings

This section contains mandatory configuration settings for configuring HP Release Control interaction with HP Universal CMDB. For information on advanced configuration settings, see “Advanced Configuration of HP Universal CMDB - All Versions” on page 124.

Deploying the HP Release Control Package in HP Universal CMDB

HP Universal CMDB is a key component in the processing of HP Release Control requests. To work with HP Universal CMDB in the context of HP Release Control, you must deploy the HP Release Control package. This package is located in the **<HP Release Control installation directory>\MAM\[version]\extention** directory.

For more information, see step 5 of “Installation Procedures” on page 33.

For details on deploying packages in HP Universal CMDB refer to the HP Universal CMDB documentation.

Importing HP Release Control Business CIs from HP Universal CMDB

In order to work with business CIs from HP Universal CMDB, they must be imported into HP Release Control. This can be done by importing all business CIs from HP Universal CMDB or selecting them individually. Importing all business CIs is simple to configure and requires less planning, it takes up system resources and once business CIs are imported to HP Release Control they cannot be removed.

Note: The following procedures can only be performed after deploying the HP Release Control package in HP Universal CMDB. For more information see Deploying the HP Release Control Package in HP Universal CMDB.

To import all business CIs from HP Universal CMDB:

- 1 Open the <HP Release Control installation directory>\conf\mam-integration.settings file.
- 2 Locate the <applications> tag. In the <applications-view> <name> section, enter **AllApplicationCis** as the name.

To import only selected business CIs from HP Universal CMDB:

- 1 Open HP Universal CMDB.
- 2 Put the desired business CI in the CCMApplications view, or you can specify a custom view as follows:
 - Locate the <HP Release Control installation directory>\conf\mam-integration.settings file. Locate the <applications-view> section and enter the name of the HP Release Control view you created in HP Universal CMDB, as follows:

```
<applications>
  <applications-view>
    <name>[view name]</name>
  </applications-view>
</applications>
```

For more information about HP Universal CMDB views refer to the HP Universal CMDB documentation.

Configuring HP Universal CMDB Basic Properties

To enable HP Release Control to work with HP Universal CMDB, you must configure certain HP Universal CMDB-related properties within HP Release Control's **mam-integration.settings** file.

Note: The following procedures can only be performed after deploying the HP Release Control package in HP Universal CMDB. For more information see Deploying the HP Release Control Package in HP Universal CMDB.

To configure HP Universal CMDB properties in HP Release Control:

- 1** Open the <HP Release Control installation directory>\conf\mam-integration.settings file.
- 2** Specify the following properties in the <mam-connection> section:

Property	Description
new-impact (versions 7.0.2 and later)	If you are upgrading HP Release Control from a previous version, the previous HP Universal CMDB settings are retained. To reset the HP Universal CMDB settings, change the value of <new-impact> to true .
mam-server	The name of the HP Universal CMDB server to which HP Release Control should connect.
cmdb-server (versions 6.6)	The name of the CMDB database server to which HP Release Control should connect. (The HP Universal CMDB server and CMDB database server may be installed on separate machines.)
port	The port through which HP Release Control should connect to HP Universal CMDB.
username (version 6.6)	The user name required to connect to HP Universal CMDB.
password (version 6.6)	The password required to connect to HP Universal CMDB. If the password must be encrypted, see Appendix A, “Password Encryption” for details on encrypting passwords.

Property	Description
installation-type (versions 6.6)	The type of HP Universal CMDB installation you have. The following installation types exist: <ul style="list-style-type: none">► typical. Both the HP Universal CMDB server and CMDB database server are located on the same machine.► shared. The HP Universal CMDB server and CMDB database server are located on separate machines.
strategy (versions 7.0 and later)	For typical distribution, the default setting of RMI exists and should not be changed. To enable a distributed configuration (primarily for BAC integration) change this value to LOCATOR . LOCATOR is configured itself with an RMI protocol. This can be changed to HTTP from the following location: <HP Release Control installation directory>\tomcat\webapps\ccm \WEB-INF\classes\conf\hac.properties. In the locator.strategy section, change the value to HTTP . Note: To enable a distributed configuration, the port must be set to 1099 .

3 Save your settings and close the **mam-integration.settings** file.

Advanced Configuration of HP Universal CMDB - All Versions

This section contains optional configuration settings for configuring HP Release Control interaction with all supported versions of HP Universal CMDB.

For information about optional configuration settings for version 6.6 of HP Universal CMDB, see “Advanced Configuration of HP Universal CMDB - Version 6.6” on page 129.

For information about optional configuration settings for versions 7.0 and higher of HP Universal CMDB, see “Advanced Configuration of HP Universal CMDB - Version 7.x” on page 132.

Configuring CI Attribute Displays

When viewing CI details in HP Release Control, the only attribute that is displayed by default is **name**. To add attributes to this list, they must be added in the **<class-type>** tag of each CIT.

You add attributes from the **<HP Release Control installation directory>\conf\mam-integration.settings** file.

To add an attribute, add an **<attributes><attribute-name>[attribute name]</attribute-name></attributes>** tag to the **<class-type>** section of the target CIT.

```
<ci-class-attributes>
  <class-type>[name of class type representing the business]</class-type>
  <attributes>
    <attribute-name>[attribute name]</attribute-name>
  </attributes>
</ci-class-attributes>
```

For example:

```
<ci-class-attributes>
  <class-type>host</class-type>
  <attributes>
    <attribute-name>host_hostname</attribute-name>
    <attribute-name>host_dnsname</attribute-name>
    <attribute-name>host_model</attribute-name>
    <attribute-name>host_os</attribute-name>
    <attribute-name>host_snmpsysname</attribute-name>
    <attribute-name>host_vendor</attribute-name>
  </attributes>
</ci-class-attributes>
```

Note: The HP Release Control application also displays the attributes of the CIT based on the HP Universal CMDB CIT hierarchy. For example, if the displayed CIT is a router, the attributes of the router's host are also displayed.

Configuring Synchronization Frequency

By default, HP Release Control is synchronized with the CMDB database every 7200 seconds—that is, every two hours. To make this synchronization more or less frequent, modify the value in the following line of the **mam-integration.settings** file's **<cmdb-synchronizations>** section:

```
<cmdb-sync-frequency>7200</cmdb-sync-frequency>
```

Configuring Initialization Delay

When working with HP Universal CMDB, HP Release Control waits 1200 seconds, by default, for CMDB views to be loaded before impact analysis calculations are begun. To lengthen or shorten the CMDB initialization delay, modify the value in the following line of the **mam-integration.settings** file's **<cmdb-synchronizations>** section:

```
<cmdb-init-views-delay>1200</cmdb-init-views-delay>
```

Configuring CI Search Directives

When a ticket is received, it is parsed using the analysis rules. These parsed strings are then used to search HP Universal CMDB for valid CIs. As entries are searched in HP Universal CMDB, only specified attributes of each entry are searched. This section configures which attributes are searched for each CIT.

By default, HP Release Control searches for changed CIs that belong to the **host**, **ip**, or **logical_application** CITs and whose format matches one of the HP Universal CMDB attributes listed in the **<cmdb-lookup-attributes>** section of the **mam-integration.settings** file.

If you want HP Release Control to search for CIs that belong to a different CIT, you must add this CIT and its relevant attributes to the **mam-integration.settings** file. You do so by including an additional **<lookup-directive>** element in the **<cmdb-lookup-attributes>** section of this file, as follows:

```
<lookup-directive>
  <class-type>[class type name]</class-type>
  <attributes>
    <attribute>[attribute name]</attribute>
    <attribute>[attribute name]</attribute>
  </attributes>
</lookup-directive>
```

To specify an additional format by which you want to locate a CI belonging to a **host** or an **ip** CIT, you must add the relevant attribute to the CIT's **<lookup-directive>**. For example, to locate an **ip** CIT by domain, in addition to locating it by address or DNS name, you would add **<attribute>ip_domain</attribute>** to the **ip** CIT **<lookup-directive>**, as follows:

```
<lookup-directive>
  <class-type>ip</class-type>
  <attributes>
    <attribute>ip_address</attribute>
    <attribute>ip_dnsname</attribute>
    <attribute>ip_domain</attribute>
  </attributes>
</lookup-directive>
```

Mapping HP Release Control–HP Universal CMDB Severity Levels

HP Universal CMDB and HP Release Control use different severity level scales. When severity levels are imported from HP Universal CMDB to HP Release Control, there must be a mapping which occurs to convert the scales. The following table shows the default mapping scheme.

HP Release Control Severity Level	HP Universal CMDB Severity Levels
Very Low	2 or below
Low	3-4
Medium	5-6
High	7-8
Critical	9

To modify this mapping scheme, change the following lines in the <enum-mappings> section of the mam-integration.settings file:

```
<entry-name>High</entry-name>
<high-value>8</high-value>
```

The number represents the upper boundary of the given severity level. In the above example, the upper boundary of the **High** severity level is 8. To modify this change the number to the required upper boundary.

Advanced Configuration of HP Universal CMDB - Version 6.6

This section contains optional configuration settings for configuring HP Release Control interaction with version 6.6 of HP Universal CMDB.

Note: The following procedures can only be performed after deploying the HP Release Control package in HP Universal CMDB. For more information see Deploying the HP Release Control Package in HP Universal CMDB.

Configuring System-Business CI Relationships

The relationships that exist between CIs are important in calculations such as impact analysis. In order to understand how a change request on one CI will affect other CIs, you must understand which CIs are linked. The links between system CIs are detected automatically by HP Universal CMDB. However, if there is a relevant connection between a system CI and a business CI it must be manually defined in HP Universal CMDB. Additionally, it must be manually defined in HP Release Control.

To manually configure a system-business CI relationship:

- 1 Increase the maximum number of business service view CI links that can be created by changing the value of **appilog.map.BusinessService.MaxLinksInView** in the **appilogConfig.properties** file to **5000**. For details on the location of this file, refer to the HP Universal CMDB documentation.
- 2 Open the HP Universal CMDB Service View Manager. Within each view definition, locate the hosts or other CITs that you want to link to a business service view CI. Right-click each host or CIT and select **Add to Business Service**. For more information on linking CITs to business service view CIs, refer to the HP Universal CMDB documentation.

Note: If you linked CITs other than hosts to a business service view CI, you must add these CITs to the **appilog.map.BusinessService.Classes** section of both the **appilogConfig.properties** file and the **<HP Universal CMDB installation directory>\root\lib\web\gui.properties** file. Use commas to separate the CITs you add. For details on the location of the **appilogConfig.properties** file, refer to the HP Universal CMDB documentation.

- 3 Update your HP Universal CMDB settings by opening the JMX console, selecting **MAM > Service=View System > reloadServerConfiguration**, and clicking the **Invoke** button. If you are working with a shared Business Availability Center–HP Universal CMDB installation, update your settings in the JMX console on both the Business Availability Center Modeling Data Processing Server and the HP Universal CMDB server. Refer to the HP Universal CMDB documentation for instructions on accessing the console.
- 4 If you created a new TQL or changed an existing one, you must add or edit the following properties in the **<applications-and-grouping>** section of the **<HP Release Control installation directory>/conf/mam-integration.settings** file:

Property	Description
name	The name of the new or modified TQL.
cis-list-object-name	The name given to the objects in the TQL that represent the list of collected CIs.

Property	Description
applications-object-name	The name given to the objects in the TQL that represent the business CIs with which the CIs are associated.
application-name-attribute	Specifies the name of each business CI with which the CIs are associated. The name of a business CI can be identified using the following properties: <ul style="list-style-type: none"> ➤ class-type. The name of the CIT representing the business CI (usually BusinessService). ➤ attribute-name. The name of the attribute containing the business CI's name.

Configuring Correlation Rules

Correlation rules define the relationships between CIs. They are defined in HP Universal CMDB and must be custom-defined to work with HP Release Control. Impact analysis is built on correlation rules.

After correlation rules are defined in HP Universal CMDB, HP Release Control imports selected rules specified by designated prefixes for the purposes of impact analysis.

CIs are related in terms of impact analysis by the direction of impact. This means that with respect to a given CI, other CIs can be labelled as either affected by or affecting that CI. The correlation rules which determine these impact relationships of CIs are defined in the **mam-integration.settings** file's **<correlation-rules>** section.

The default setting is that only those rules with the prefix **ccm** are imported. If you want HP Release Control to use additional or alternative correlation rules, you must define these rules in the **<patterns>** element of the **mam-integration.settings** file's **<correlation-rules>** section using regular expressions.

For example, if you want to define alternative correlation rules to be used, you could modify the **<patterns>** element as follows, using regular expressions:

```
<patterns>  operations.*
             database.*
</patterns>
```

The above code indicates that any correlation rule found in HP Universal CMDB with the prefix operations or database will be included in the impact analysis calculations.

Each expression you use should appear on a separate line. For details on working with regular expressions, refer to the following URL: <http://java.sun.com/j2se/1.4.2/docs/api/java/util/regex/Pattern.html>

You can also modify the **<patterns>** element without using regular expressions, or using a combination of regular expressions and actual correlation rule names. For example:

```
<patterns>  weblogic
             j2ee
             database.*
</patterns>
```

Advanced Configuration of HP Universal CMDB - Version 7.x

This section contains optional configuration settings for configuring HP Release Control interaction with versions 7.0 and higher of HP Universal CMDB.

Note: The following procedures can only be performed after deploying the HP Release Control package in HP Universal CMDB. For more information see Deploying the HP Release Control Package in HP Universal CMDB.

Configuring System-Business CI Relationships

The relationships that exist between CIs are important in calculations such as impact analysis. In order to understand how a change request on one CI will affect other CIs, you must understand which CIs are linked. The links between different system CIs are detected automatically by HP Universal CMDB. However, if there is a relevant connection between a system CI and a business CI it must be manually defined in HP Universal CMDB.

To manually configure a system-business CI relationship:

- 1 Open the HP Universal CMDB View Manager.
- 2 Within each view definition, locate the nodes (representing hosts or groups of other CIs) that you want to link to a business CI.
- 3 Right-click each node and select **Add to Applications**.

For more information on linking nodes to business CIs, refer to the HP Universal CMDB documentation.

Converting System CITs to Business CITs

The initial categorization of CITs into business and system CIs is performed by HP Universal CMDB. When importing a CIT from HP Universal CMDB, the category is carried over to HP Release Control. However, you can configure a system CIT in HP Universal CMDB to be imported as a business CIT in HP Release Control.

To import a system CIT as a business CIT:

- 1 Open HP Universal CMDB.
- 2 In the CIT, add the "ccmBusiness" qualifier.

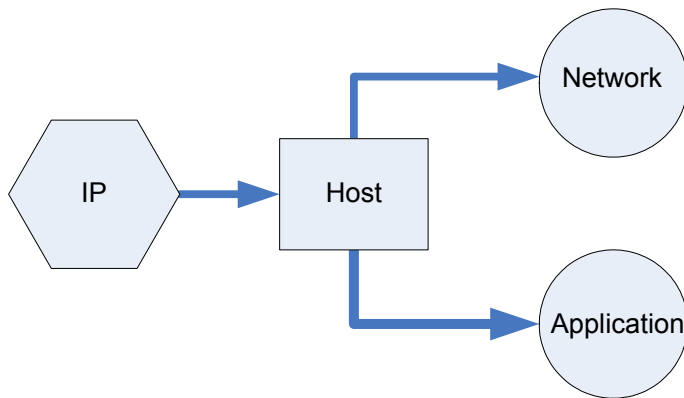
Configuring Correlation Rules

Correlation rules define the relationships between CIs. They are defined in HP Universal CMDB and must be custom-defined to work with HP Release Control. Impact analysis is built on correlation rules.

After correlation rules are defined in HP Universal CMDB, HP Release Control imports selected rules specified by designated prefixes for the purposes of impact analysis.

CIs are related in terms of impact analysis by the direction of impact. This means that with respect to a given CI, other CIs can be labelled as either affected by or affecting that CI. The correlation rules which determine these impact relationships of CIs are defined in the **mam-integration.settings** file's **<impact-correlation-patterns>** section.

The default setting is that only those rules with the prefix **ccm** are imported. This specifies a correlation between CITs of type IP, host, network, and application as follows, where arrows point in the direction of impact:



If you want HP Release Control to use additional or alternative correlation rules, you must define these rules in the **<patterns>** element of the **mam-integration.settings** file's **<impact-correlation-patterns>** section using regular expressions.

For example, if you want to define alternative correlation rules to be used, you could modify the **<patterns>** element as follows, using regular expressions:

```
<impact-correlation-patterns>
  <patterns> operations.*
               database.*
  </patterns>
</impact-correlation-patterns>
```

The above code indicates that any correlation rule found in HP Universal CMDB with the prefix **operations** or **database** will be included in the impact analysis calculations.

Each expression you use should appear on a separate line. For details on working with regular expressions, refer to the following URL: <http://java.sun.com/j2se/1.4.2/docs/api/java/util/regex/Pattern.html>

You can also modify the **<patterns>** element without using regular expressions, or using a combination of regular expressions and actual correlation rule names. For example:

```
<patterns>  weblogic
             j2ee
             database.*
</patterns>
```

Triggered CI to Changed CI Correlation Rules

Triggered CIs are those mentioned explicitly on the ticket. Change CIs (CCIs) are CIs which will be directly changed as a result of a change request. All Triggered CIs are by definition CCIs. CCIs can be triggered or not triggered. The relationship defining triggered CIs and CCIs is defined by the correlation rules located in the **mam-integration.settings** file's **<directly-affected-correlation-patterns>** section. The **<patterns>** element defines which correlation rules are imported using regular expressions.

7

Working in Standalone Mode

This chapter describes how to work with HP Release Control in standalone mode without using HP Universal CMDB.

This chapter includes:

- About Working in Standalone Mode on page 137
- Configuring the cmdb-mock.js Script on page 138

About Working in Standalone Mode

Important: Working in standalone mode provides limited capabilities and functionality and is intended only as a first step in working with HP Release Control. To take full advantage of the features offered by HP Release Control, you should be working with HP Universal CMDB.

In a regular HP Release Control deployment, when your service desk application is synchronized with the CMDB server, HP Release Control can locate CIs using the CI or change request IDs and perform an impact analysis of the identified CIs.

When you are working in standalone mode, you use the functions within the **<HP Release Control installation directory>\conf\scripts.ext\cmdb-mock.js** script to configure how HP Release Control identifies CIs and how the CIs are used in impact analysis calculations.

To configure HP Release Control to work in standalone mode:

Open the <HP Release Control installation directory>\conf\mam-integration.settings file and enter **Mock** as the value of the <mam-version> property.

Configuring the cmdb-mock.js Script

The **cmdb-mock.js** script is divided into the following three sections:

- **Analyze CI config**
- **Impact config**
- **Synchronize Application config**

Analyze CI config

HP Release Control uses analysis rules to locate names of CIs within collected requests. You use the following functions in the **Analyze CI config** section to generate a unique ID for the CI names that were located and to determine how the CIs will appear in the HP Release Control UI:

- **getCiType**. This function assigns a type of CI. By default, the CI type is taken from the name of the analysis rule that located the CI.

```
function getCiType(analyserName){  
    return analyserName.toLowerCase();  
}
```

- **getCiID**. By default, this function uses the CI type defined above and the name of the CI itself as it appears in the request, to generate a unique ID for the CI.

```
function getCiID(ciName, ciType){  
    return ciName.toLowerCase() + ciType.;  
}
```

Important: The **getCiID** function should always be defined so that the value of ID that is generated is unique in HP Release Control. This ensures that each CI is uniquely analyzed with within the system.

- **getCiLabel.** This function defines the way the CI will appear in the HP Release Control UI. By default this function returns the name of the CI as it appears in the request.

```
function getCiLabel(ciName, ciType){
    return ciName;
}
```

Impact config

You use the following functions in the **Impact config** section to determine the behavior of CIs during Impact Analysis calculations:

- **isSystem.** This function determines whether the CI objects defined above in the **Analyze CI config** section are classified as business or as system CIs (hardware). In the HP Release Control UI, business and system CIs are displayed differently in the impact analysis results.

```
function isSystem(ciName, ciType){
    for(i=0; i< APPLICATION_TYPES.length; i++){
        if(APPLICATION_TYPES[i].toLowerCase() == ciType.toLowerCase()){
            return false;
        }
    }
    return true;
}
```

The above function can either refer to application type variables that you define at the beginning of the **Impact config** section or it can refer out to an external javascript file.

- **getSeverity.** This function defines the impact severity levels for each CI in impact analysis calculations.

```
function getSeverity(name, type){
    if (type.toLowerCase() == APP_TYPE1.toLowerCase()){
        return SEVERITY_CRITICAL;
    }
    else if(type.toLowerCase() == APP_TYPE2.toLowerCase()){
        return SEVERITY_HIGH;
    }
    else if(name.toLowerCase() == APP_NAME1.toLowerCase()){
        return SEVERITY_MEDIUM;
    }
    return SeverityEnum.getUnknown();
}
```

The return values for this function need to be defined in the **HP Release Control installation directory>\conf\enumerations.settings** file.

Synchronize Application config

In a regular HP Release Control deployment, HP Release Control is synchronized with the CMDB database. When a Business CI no longer appears in the CMDB database, the Business CI is defined as obsolete in the HP Release Control UI.

In standalone mode, you can determine whether you want HP Release Control to differentiate between relevant and obsolete business CIs. If you do want to differentiate, you define a list of relevant business CIs. All business CIs that do not match this list will be defined as obsolete.

You use the following functions in the **Synchronize Application config** section to define this functionality:

- **showObsolete.** This function defines whether or not HP Release Control differentiates between relevant and obsolete business CIs.

```
function showObsolete(){
    return false;
}
```

By default, this function is set to **false** and the HP Release Control does not differentiate between relevant and obsolete business CIs. If you set it to **true**, use the **synchronizerApplication** function to define a list of relevant business CIs.

- **synchronizerApplication.** This function defines a list of relevant business CIs. All business CIs defined in the above sections that do not match the criteria determined in this function will be defined as obsolete.

```
function synchronizerApplication(applicationsSet){
    // ScriptingApplicationImpl (appName, appType)
    applicationsSet.add(new ScriptingApplicationImpl(APP_NAME1, APP_TYPE1));
    applicationsSet.add(new ScriptingApplicationImpl(APP_NAME2, APP_TYPE2));
    applicationsSet.add(new ScriptingApplicationImpl(APP_NAME3, APP_TYPE3));

    return applicationsSet;
}
```

You can define the criteria for relevant business CIs inside the function as illustrated above or you can refer out to an external file or database.

If you define the criteria inside the function and you change the criteria, you need to restart the HP Release Control server for the changes to take effect.

Note: In the HP Release Control UI, you can use the business CIs criteria defined in this function to filter change requests before they come into the system.

8

Configuring General Settings

This chapter describes how to configure the SMTP mail server responsible for sending HP Release Control email notifications and how to reconfigure the HP Release Control application server address.

This chapter includes:

- Configuring the SMTP Mail Server on page 143
- Configuring the HP Release Control Server on page 144

Configuring the SMTP Mail Server

To work with HP Release Control, you must configure connection properties for the SMTP mail server responsible for sending HP Release Control email notifications. The following are the properties you must configure in the **<HP Release Control installation directory>\conf\integrations.settings** file:

- **user name.** Specify the user name required to connect to the SMTP mail server, if one is required.
- **password.** Specify the password required to connect to the SMTP mail server, if one is required. If the password must be encrypted, see Appendix A, “Password Encryption” for details on encrypting passwords.
- **SMTP host.** Specify the host name of the SMTP mail server machine.
- **SMTP port.** Specify the port to be used to connect to the SMTP mail server.

Configuring the HP Release Control Server

The HP Release Control application server name and address are configured automatically during the HP Release Control installation process. HP Release Control uses these settings to create links to requests in the HP Release Control application from email notifications.

If the links from the email notifications to the HP Release Control application are not working properly, this may be a result of DNS resolution problems. To try and resolve this issue for future notifications that are sent, change the server machine name in the following line of the **<HP Release Control installation directory>\conf\server.settings** file to the server IP address.

For example, change:

```
<server-address>http://server1:8080/ccm</server-address>
```

to:

```
<server-address>http://198.10.20.1:8080/ccm</server-address>
```


9

Configuring Business Settings

You view details of the Business CIs affected by the change requests that HP Release Control processes, assign importance levels to these business CIs, and associate specific users with them in the Administration module's Business CIs tab.

This chapter includes:

- Viewing Business CI Details on page 145
- Assigning Importance Levels to Business CIs on page 146
- Associating Business CIs with Users on page 148

Viewing Business CI Details

You can view details of the Business CIs included in the HP Universal CMDB view that you defined for HP Release Control.

To view business CI details:

- 1** In the Administration module's **Business CIs** tab, select the business CI whose details you want to view. If the list of business CIs is lengthy, you can use the search box and/or the **First**, **Previous**, **Next**, and **Last** buttons to locate the business CI.





- 2 Click the **Edit** button in the top left corner. The Edit Business CIs – <Business CI Name> dialog box opens, displaying a description of the business CI as well as other HP Universal CMDB-related details of the business CI.

Edit Business CI - CandidateIsEqualLookupAttribute

Business CI Details Business CI Users

Business CI name: CandidateIsEqualLookupAttribute

Business CI importance: 6

Description:

HP CMDB owner:

Service name:

Organization name:

OK Cancel

Assigning Importance Levels to Business CIs

As part of the HP Release Control risk analysis configuration, you assign relative levels of importance to your business CIs. Each business CIs can be assigned an importance level between 1 and 10. Change requests that affect business CIs with higher importance levels will be marked by HP Release Control as having a higher risk.

To assign importance levels to business CIs:

- 1 In the Administration module's **Business CIs** tab, select the business CI for which you want to assign an importance level. If the list of business CIs is lengthy, you can use the search box and/or the **First**, **Previous**, **Next**, and **Last** buttons to locate a business CI.





- 2 Click the **Edit** button in the top left corner. The Edit Business CIs – <Business CI Name> dialog box opens.

- 3 From the **Business CI importance** list, select a business CI importance level between 1 and 10.

Note: If you do not assign an importance value to a business CI, the default importance value assigned is zero.

In this case, the default mapping is used for the **business CI importance** risk factor in the risk calculation. For more information about defining risk factors, see “Defining Risk Factors” on page 193.

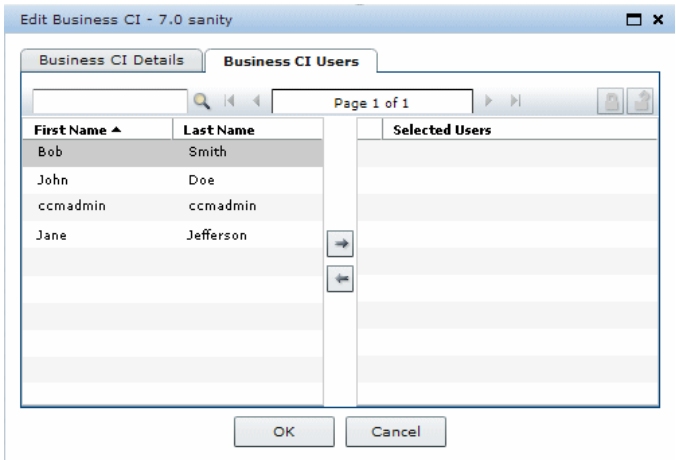
- 4 Click **OK** to save your settings and close the Edit Business CI – <Business CI Name> dialog box.

Associating Business CIs with Users

You can associate specific HP Release Control users with each business CI.

To associate HP Release Control users with a business CI:

- 1 In the Administration module's **Business CIs** tab, select the business CI you want to associate with one or more users. If the list of business CIs is lengthy, you can use the search box and/or the **First**, **Previous**, **Next**, and **Last** buttons to locate the business CI.
- 2 Click the **Edit** button in the top left corner. The Edit Business CI – <Business CI Name> dialog box opens.
- 3 Click the **Business CIs** tab. A list of the HP Release Control users previously defined by the administrator is displayed in the left hand pane.

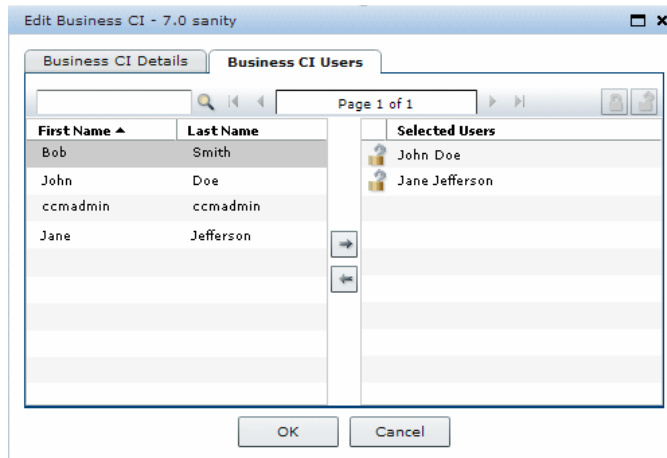


- 4 Select the users you want to associate with the business CI from the users list in the left hand pane. If the list of users is lengthy, you can use the search box to display only those users that match the text you enter in the search box. In addition, you can use the **First**, **Previous**, **Next**, and **Last** buttons to locate a user. You can select multiple users using the CTRL key.





- 5 Click the top arrow. The users appear in the **Selected Users** list.



- 6 To ensure that a user will not be able to remove the business CI with this business CI, select the user and click the **Enforce Business CI** button.



To restore the user's ability to remove the association with this business CI, select the user and click the **Stop Enforcing Business CI** button.

- 7 Click **OK** to save your settings and close the Edit Business CI – <Business CI Name> dialog box. Your modifications will take effect when you next log in to HP Release Control.

Part IV

Configuring Analysis of Change Requests

10

Before Configuring Change Request Analysis

This chapter describes the initial configuration procedures that you need to complete before configuring change request analysis.

reference to the flow

This chapter includes:

- Configuring the Collection Frequency of Converted Requests on page 153
- Using the Pre- and Post-Change Request Processing Functions on page 154

Configuring the Collection Frequency of Converted Requests

After change requests have been converted from their original service desk application formats to a standard, generic format, they can be processed by HP Release Control. By default, HP Release Control collects the converted requests for processing every 30 seconds. To modify the request collection frequency, you must change the value in the following line of the <HP Release Control installation directory>\conf\change-flow.settings file:

```
<change-collection-freq>30</change-collection-freq>
```

Using the Pre- and Post-Change Request Processing Functions

You can use the **preChangeProcess** and **postChangeProcess** functions in the **<HP Release Control installation directory>\conf\scripts.ext\change-flow.js** script to calculate certain pre-change request processing or post-change request processing factors.

For example, if you want to define a risk factor based on the amount of time that a change request is in the HP Release Control system without being processed, you can use the **preChangeProcess** function to calculate the time at which the change request first enters HP Release Control. To do so, you would define a custom field called **first-time** that would be configured to the time at which the change request enters HP Release Control. You would then instruct HP Release Control to calculate the **first-time** value as follows:

```
function preChangeProcess(prevChange, newChange)
{
    If (prevChange == null) {
        var now = java.lang.System.currentTimeMillis();
        newChange.setField("first-time", now);
    }
    else {
        var firstTime = prevChange.getField("first-time");
        newChange.setField("first-time", firstTime);
    }
}
```

You can use the **postChangeProcess** function in a similar manner to calculate factors relating to steps within the request processing itself, such as the calculation of risk or collisions.

For a detailed explanation of the objects that can be included in these functions, refer to the **GenericRFC** class in the **API_Reference.chm** file, located in the **<HP Release Control installation directory>\documentation** folder.

11

Configuring Impact Analysis

This chapter describes how to set up and configure HP Release Control to calculate impact analysis.

This chapter includes:

- About Configuring Impact Analysis on page 155
- Determining When to Calculate Impact Analysis on page 155
- Adding Operations Before Impact Analysis on page 157
- Configuring Analysis Rules on page 158

About Configuring Impact Analysis

Impact analysis calculates the effects of change requests on CIs. Both the CI details, and their relationships are imported from HP Universal CMDB. Therefore, in order for impact analysis to function, you must configure the HP Universal CMDB settings. For more information, see “Overview of Configuring HP Universal CMDB-Related Settings” on page 120.

Determining When to Calculate Impact Analysis

Calculating impact analysis uses a lot of system resources. HP Release Control can be configured to minimize the instances in which impact analysis is performed to save system resources.

Every time a new ticket is created, the impact must be calculated. However, impact is also calculated in some cases in which a change was made to an old ticket/change request. The **shouldCalcImpact** function within the **<installation directory>\conf\scripts.ext\change-flow.js** script contains the protocol which determines when impact must be recalculated. By default, the function appears as follows:

```
function shouldCalcImpact (prevChange, newChange)
{
    if (newChange.isInitialLoadState())
        return true;

    newChangeValidStatus = isStatusValid4Calc(newChange);
    prevChangeValidStatus = isStatusValid4Calc(prevChange);

    if(prevChange == null){
        return true ;
    }

    if ( !prevChangeValidStatus && newChangeValidStatus ){
        return true;
    }

    else if(!newChange.isAnalyzedCisEquals(prevChange)){
        return newChangeValidStatus;
    }

    return newChangeValidStatus;
}
```

The above function works as follows:

- HP Release Control first checks whether there is a pre-existing, valid impact analysis on this change request. If not, it returns true (impact is calculated).
- If the triggered CIs in the original change request are the same after the change to the change request, the impact is not recalculated. If the triggered CIs are different, the impact is recalculated.

For a detailed explanation of the objects that can be included in this function, refer to the **GenericRFC** class in the **API_Reference.chm** file, located in the **docs\pdfs** directory of the HP Release Control CD-ROM.

In the **<impact-calculation>** section of the **change-flow.settings** file, you can specify whether the impact of CIs in tasks (second-level requests) should be calculated separately from the changes to which the tasks belong, or be included in the impact analysis of the tasks' respective changes. By default, an impact analysis of a task will trigger an impact analysis for the change with which it is associated, and the changed CIs of a task are included in the changed CI list of the task's parent change. To modify this, change the value in the following line to **false**:

```
<aggregate-cis>true</aggregate-cis>
```

Adding Operations Before Impact Analysis

Based on your impact analysis calculations, you may want to perform certain operations prior to every impact analysis. For example, you may want to update certain CI data prior to calculating impact if that data will affect the impact analysis.

The **preCalcRisk** function within the **<installation directory>\conf\scripts.ext\change-flow.js** script contains the location in which you can add operations to be performed before each impact analysis. By default, this function is empty, meaning that no operations are automatically performed before each impact analysis. It receives two arguments which are both writable GenericRFC arguments.

For a detailed explanation of the objects that can be included in this function, refer to the **GenericRFC** class in the **API_Reference.chm** file, located in the **docs\pdfs** directory of the HP Release Control

Configuring Analysis Rules

To analyze the impact of the collected change requests, HP Release Control must first identify the location and format of the CIs contained in the requests. This is done by the analysis rules. You define the analysis rules you want HP Release Control to use in the Administration module's Analysis Rules tab.

This section includes the following topics:

- “Adding or Editing Analysis Rules” on page 158
- “Testing Analysis Rules” on page 160
- “Applying Analysis Rules to Fields” on page 160
- “Determining When to Analyze the Tickets” on page 162

Adding or Editing Analysis Rules

HP Release Control must have a separate analysis rule for each CIT which you want to recognize. Analysis Rules can be added and edited in the Analysis Rules tab.

To add or edit an analysis rule:

- 1** In the Administration module, click the Analysis Rules tab and select the desired rule you wish to edit.



To add a new rule, click the **Add Rule** button.

- 2** In the CI Analysis Rule Definition pane, fill in the following fields:
 - **Name.** The name of the CIT that you want HP Release Control to locate in the collected requests, as well as the logical name of the analysis rule that can be referenced in the field settings (for more information, see “Configuring Analysis Rules” on page 158).

Notes:

- The name of the CIT must appear as it is defined in the <**HP Release Control installation directory**>\conf \mam-integration.settings file in the <lookup-attributes-directives> tag (if you are working with HP Universal CMDB).
 - The **ip-range** analysis rule is an exception to the above specifications, as it corresponds to the **ip** CIT in HP Universal CMDB.
-

- **Description.** A description of the CIT that you want HP Release Control to locate in the collected requests.
- **Analyzer class.** Select **Use rule name as CI class type** unless your CIT is IP-Range. For IP-Range CITs, select **Use the IP-Range analyzer**.
- **Patterns.** The text from various fields on the collected requests is parsed using regular expressions defined as **patterns**. For details on working with regular expressions, refer to the following URL: <http://java.sun.com/j2se/1.4.2/docs/api/java/util/regex/Pattern.html>



- To delete a pattern, click the **Remove Pattern** button.



- To add a new pattern, click the **Add Pattern** button.

Patterns are defined by the following two elements:

- **Match Pattern.** A regular expression which defines how to parse the collected requests in the process of identifying CI, using regular expressions.
- **CI Backreference.** Uses regular expressions to specify the exact part of the pattern in which the CI is located. A value of 1 is used to specify the first group in the pattern, a value of 2 is used to specify the second group in the pattern, and so forth. A value of 0 instructs HP Release Control to use the entire pattern in locating the CI.


By default, analysis rules are defined for the **host**, **ip**, and **ip-range** CITs. In addition, there are two predefined, built-in analysis rules that can be used when your service desk application is synchronized with the CMDB server. The **cmdb-object-id** analysis rule locates CIs using the IDs of HP Universal CMDB CIs. The **nam-ticket** analysis rule locates CIs using change request IDs.

You apply analysis rules to change request fields in the Administration module's Fields tab. For more information about applying analysis rules, see "Configuring Analysis Rules" on page 158.

Testing Analysis Rules

Analysis rules can be tested by manually entering a string and running the patterns on it. The results are displayed in the Analyzed CIs pane.

To test an analysis rule:

- 1** In the Analysis Rules tab, select the rule that you want to test.
- 2** In the Test Selected Analyzer pane, select **All Patterns** to perform the test using all defined patterns or **Selected Pattern** to perform the test using the selected pattern.
- 3** When the test is run, the ticket text is broken up into strings. To have HP Release Control check these strings for valid CIs using the uCMDB, select the **Match candidate with CMDB** box.
- 4** In the **Test Value** pane, enter a string to test the analysis rule.
-  **5** Click the **Test Analyzer** button to test the analysis rule. The parsed string is displayed in the Analyzed CIs pane.

Applying Analysis Rules to Fields

You apply analysis rules to change request fields in the Administrator module's Fields tab. These are the rules according to which you want HP Release Control to identify the location and format of CIs contained in the field's text.

You can apply analysis rules to change request fields of type **Short Text** or **Long Text**. It is recommended that you apply analysis rules to change request fields that contain CIs only, without additional text comments.

For more information about creating or modifying change request fields, see “Configuring Change Request Field Settings” on page 57.

To apply analysis rules to change request fields:

- 1** In the Administrator module, click the **Fields** tab.
- 2** In the Field Attributes pane, click the **CI Analysis Rules** tab.

The CI Analysis Rules tab contains all the analysis rules specified in the Analysis Rules tab. When you add a rule to the Analysis Rules tab, it appears as the last rule in the CI Analysis Rules tab.

- 3** To apply analysis rules to the selected change request field, select the check boxes next to the appropriate analysis rules. By default, the following analysis rules are available:

Rule	Description
cmdb-object-id	A predefined, built-in analysis rule that can only be used when your service desk application is synchronized with the CMDB server. This rule locates CIs using Mercury Application Mapping configuration item IDs.
mam-ticket	A predefined, built-in analysis rule that can only be used when your service desk application is synchronized with the CMDB server. This rule locates CIs using change request IDs.
host	Identifies hosts within the selected field.
ip	Identifies IP addresses within the selected field.
ip-range	Identifies IP addresses within the selected field from a range of IP addresses that you define.

For each analysis rule that you selected, choose the level at which you want to apply the rule:

- **Change.** The analysis rule is applied to the field only when the field belongs to a top-level request.
- **Task.** The analysis rule is applied to the field only when the field belongs to a second-level request.

You can select both **Change** and **Task** if you want the analysis rule to apply to all requests in which the selected field appears.

Note: The names of the top-level and second-level requests are configurable in the **enumeration-labels.properties** file. For more information see “Configuring Enumeration Field Display Settings” on page 279.

By default, the **host**, **ip**, and **ip-range** analysis rules are applied to the **changed-ci-list** field, at both the **Change** and **Task** levels.

Determining When to Analyze the Tickets

HP Release Control can be configured to minimize the instances in which a ticket analysis is performed to save system resources.

Every time a new ticket is created, the impact must be calculated. However, impact is also calculated in some cases in which a change was made to an old ticket/change request. The **shouldAnalyze** function within the `<installation directory>\conf\scripts.ext\change-flow.js` script contains the protocol which determines when to analyze a ticket. By default, the function appears as follows:

```
function shouldAnalyze(prevChange, newChange){
  if (newChange.isInitialState()){
    return true;
  }

  if(newChange.isTicketAnalyzer()){
    return true;
  }

  return !(newChange.isAnalysisRulesEqual(prevChange));
}
```

The above function works as follows:

- HP Release Control first checks to see if this is the first time this ticket is being loaded. If it is, a ticket analysis is performed.
- If this is not the first time the ticket is being loaded, HP Release Control checks to see if you are using PPM integrated with HP Universal CMDB. If you are, a ticket analysis is performed.
- Next, HP Release Control checks to see if there have been any changes to the ticket. If there have been changes, a ticket analysis is performed. If there have not been changes, no ticket analysis is performed and the function concludes.

For a detailed explanation of the objects that can be included in this function, refer to the **GenericRFC** class in the **API_Reference.chm** file, located in the **docs\pdfs** directory of the HP Release Control CD-ROM.

12

Configuring Time Periods

This chapter describes how to configure time periods in HP Release Control.

This chapter includes:

- About Configuring Time Periods on page 165
- Configuring Time Period Settings on page 166

About Configuring Time Periods

You can configure the following types of time periods in HP Release Control:

- **Changes Allowed.** A period of time within which requests must be executed.
- **Changes Not Allowed.** A period of time within which requests cannot be executed.
- **Neutral to Changes.** A period of time indicating an external event, such as a holiday, which has no direct bearing on request execution.

For example, to ensure that your company's service level agreements are upheld, you may determine that changes to your corporate Web site may only take place between the hours of 12:00 AM and 6:00 AM Eastern Standard Time. Changes that are not made within this period would be considered abnormal.

Likewise, you may determine that changes to the Web site may not take place on Monday mornings from 3:00 AM to 6:00 AM Eastern Standard Time. Changes that are made within this period would also be considered abnormal.

For a request to be considered normal, it must be executed completely within a **Changes Allowed** period and outside a **Changes Not Allowed** period. Neutral periods do not affect a request’s normality status.

Configuring Time Period Settings

You configure different types of time periods and group these periods into categories in the Administration module’s Time Periods tab. HP Release Control assigns processed change requests to the defined categories based on criteria that you define for each time category, as described below.

To configure time period settings:

1 Configure general time period settings.

In the Time Periods pane, select **General Settings**. Define the following properties in the right pane:

Property	Description
Time period duration	The number of days for which the time period settings should be calculated. The time periods for these days are calculated on a daily basis by HP Release Control so that the duration is always applied from the current date. For example, if you define a time period duration of 200 days, each day you log in to HP Release Control you can view the defined time periods for the following 200 days in the Analysis module’s Timeline or Calendar views. Incoming requests are analyzed based on these time periods.


Property	Description
Pattern for 'Changes Allowed' period	<p>The background pattern that HP Release Control's Analysis module should use to display a defined Changes Allowed period in the Timeline and Calendar views. You can select the following background patterns:</p> <ul style="list-style-type: none"> ➤ Plain. The Analysis module displays the Changes Allowed period using a solid color background. ➤ Diagonal Lines. The Analysis module displays the Changes Allowed period using a background of diagonal lines. ➤ Horizontal Lines. The Analysis module displays the Changes Allowed period using a background of horizontal lines. ➤ Squares. The Analysis module displays the Changes Allowed period using a background of colored squares.
Pattern for 'Changes Not Allowed' period	<p>The background pattern that HP Release Control's Analysis module should use to display a defined Changes Not Allowed period in the Timeline and Calendar views. You can select one of the background patterns delineated above.</p>
Pattern for 'Neutral to Changes' period	<p>The background pattern that HP Release Control's Analysis module should use to display a defined Neutral to Changes period in the Timeline and Calendar views. You can select one of the background patterns delineated above.</p>

2 Configure time period categories.



In the Time Periods pane, click the **Add Time Period Category** button. A new time period category appears in the Time Periods pane. Define the following properties of the new category in the right pane:

Property	Description
Name	A descriptive name for the new time period category. For example, if you are defining a category that is to include all change requests involving your corporate Web site, you might enter Corporate Web site as the name of the new time period category. This is the name with which the category will be displayed in the Change Request Filter dialog box and Change Requests pane.
Color	The color to be assigned to the new time period category. This is the color that HP Release Control uses to display the category in the Analysis module.

Property	Description
Matching changes	<p>The criteria by which HP Release Control determines whether a change request is included in the newly defined category.</p> <p>You can select one of the following two criteria:</p> <ul style="list-style-type: none"> ➤ Field. Instructs HP Release Control to include a change request in the current category if the value you specify in the Value box for the field you select from the Name box matches the value of this field in the change request. For example, if you select contact-person from the Name box and enter Bob in the Value box, the change requests whose contact-person field contains the value of Bob will be included in the newly defined category. ➤ Filter. Instructs HP Release Control to include a change request in the current category if the request meets the criteria of the selected filter. To select a filter, click the Select Filter button  to the right of the Filter box. The Select Filter dialog box opens, enabling you to select a filter that was defined as a time period filter in the Change Request Filter dialog box (meaning the Time period filter check box was selected by the administrator who created the filter).

3 Configure time period recurrence rules.



In the Time Periods pane, select the category for which you want to define a recurrence rule and click the **Add Time Period Recurrence Rule** button. A new time period recurrence rule appears in the Time Periods pane. Define the following properties of the new rule in the right pane:

Property	Description
Name	A descriptive name for the new time period recurrence rule. For example, if you are defining a Changes Allowed period that comprises specific weekends, you might enter weekends as the name of the new time period rule.
Type	The type of time period— Changes Allowed , Changes Not Allowed , or Neutral to Changes —to be created by the rule. For explanations of each of these time period types, see page 165.
Recurrence pattern	The pattern for the time period's recurrence. You can choose to apply the time period once or on a daily, weekly, monthly, or yearly basis.
Recur every X days/weeks/months/years	If you selected a Daily , Weekly , Monthly , or Yearly pattern for the time period's recurrence, you can select the frequency with which you want the pattern to recur. For example, if you selected a Daily pattern for the time period's recurrence and select 3 from the Recur every X days box, the time period will recur every 3 days.

Property	Description
Start time	<p>The Start time options differ depending on the pattern you selected for the time period's recurrence.</p> <ul style="list-style-type: none"> ➤ If you selected Once, enter the date and time for the time period's commencement. ➤ If you selected Daily, enter the time at which you want the time period to begin. ➤ If you selected Weekly, choose the days of the week and enter a time of day for the time period's commencement. ➤ If you selected Monthly, either enter a date and time, or select the week of the month, the day of the week, and the time, for the time period's commencement. ➤ If you selected Yearly, either enter a date and time, or select the week of the month, the day of the week, the month of the year, and the time, for the time period's commencement.
End time	<p>The following three End time options exist:</p> <ul style="list-style-type: none"> ➤ A text box in which you enter the date and time for the time period's completion. ➤ On the same day at X. You select the time of day at which you want the time period to end. ➤ After X days at X. You select the number of days after the start time as well as the time of day for the time period's completion. <p>One or more of the above options may be grayed out, depending on the Recurrence pattern and Start time you selected.</p>
Effective from	<p>The point in time at which the rule begins to take effect. Enter a date and time of day.</p>
Expires on/Never expires	<p>The point in time at which the rule ceases to be in effect. Enter a date and time of day. Alternatively, you can select the Never expires check box if you do not want to fix a time limit for the rule's effect.</p>



Note: You can undo your general setting, category, and rule configurations (before you save these settings) by clicking the **Refresh and Undo Modifications** button. The Time Periods tab is restored to its most recent saved settings.

4 Save your configuration settings.



In the Time Periods pane, click the **Save Settings for All Fields** button. A message opens asking you to confirm that you want to save your configuration settings. Bear in mind that once you save these settings, they cannot be undone. Click **Yes** to save the settings.

Note: The save process can take a few minutes. If users log in to HP Release Control during this process, they will need to refresh their Analysis views in order to view the updated time period settings.

HP Release Control calculates the compliance of the change requests that fit the configured categories with the rules pertaining to these categories.

Change requests whose execution is not planned within the configured Changes Allowed periods are marked as abnormal in the Analysis module. Likewise, change requests whose execution is planned within the configured Changes Not Allowed periods are marked as abnormal. In the Analysis List and Calendar view, these requests' Summary icons are marked with red exclamation points. In the Timeline views, these requests are marked with a black frame.



Change requests whose execution is planned within the configured Changes Allowed periods are marked as normal and appear with a white frame in the Timeline views.





Note: If you defined time period-related risk factors and then updated the time period settings, you must click the **Recalculate Risk** button in the Risk Factors tab to calculate risk based on the new time period settings.

13

Configuring Collision Calculations

This chapter describes how to configure the calculation of collisions between requests.

This chapter includes:

- About Configuring Collisions on page 175
- Determining Which Change Requests to Include in Collision Calculations on page 176
- Calculating Change Request Collisions on page 179

About Configuring Collisions

HP Release Control automatically identifies change requests involving common key elements, that are scheduled to take place over the same or adjacent time periods.

Change requests are defined as colliding when:

- a configuration item (CI) or business CI is involved in more than one change over the same time period or adjacent time periods
- the same implementor is responsible for implementing more than one change over the same time period or adjacent time periods
- a specified field has the same value in more than one change over the same time period or adjacent time periods

The severity of a collision is measured in terms of the cause of the collision and the proximity of the change requests to one another.

You can configure how HP Release Control selects which change requests to include in collision calculations, and how it identifies and calculates collisions.

This section includes:

- “Determining Which Change Requests to Include in Collision Calculations” on page 176
- “Calculating Change Request Collisions” on page 179

Determining Which Change Requests to Include in Collision Calculations

You can configure HP Release Control to include only specific change requests when calculating collisions, thereby avoiding misleading results and a lot of unnecessary overhead on the system.

This section includes:

- “Including Change Requests According to Status” on page 177
- “Including Change Requests According to Duration” on page 177
- “Including Change Requests Based On Other Criteria” on page 178

Including Change Requests According to Status

You can select change request statuses to consider when determining which change requests to include in collision calculations.

To select the change request statuses:

- 1 Open the **change-flow.settings** file (located in <HP Release Control installation directory>\conf\).
- 2 In the <collision-calculation> section, locate the <statuses> element.

```
<collision-calculation version="4.0">
  <statuses>
    <status>ASSIGNED</status>
    <status>PENDING_APPROVAL</status>
    <status>APPROVED</status>
    <status>IN_PROGRESS</status>
    <status>CLOSED</status>
  </statuses>
```

By default, change requests of all statuses are included in collision calculations.

- 3 To exclude change requests statuses, delete the relevant sub-elements.

For example, to exclude closed change requests, remove the sub-element containing the **CLOSED** status:

```
<status>CLOSED</status>
```

- 4 Save the **change-flow.settings** file.

Including Change Requests According to Duration

You can determine whether to include a change request in collision calculations by considering its duration. You specify a maximum acceptable change request duration. If the duration of a particular change request exceeds this value, HP Release Control does not include that change request in collision calculations.

To change the maximum duration value:

- 1 Open the **change-flow.settings** file (located in <HP Release Control installation directory>\conf\).
- 2 In the <collision-calculation> section, locate the <max-change-duration> element:

```
<collision-calculation version="4.0">
.
.
<!--Changes lasting longer than this threshold (hours) will not be analyzed for collisions
(helps ignoring collisions of long changes, and improves performance)-->
<max-change-duration>168</max-change-duration>
```

By default, a change request is included in collision calculations as long as its duration does not exceed 168 hours (seven days).

- 3 Define a new maximum duration value (in hours). To disregard change request duration, that is, if any duration is acceptable, set this value to **0**.
- 4 Save the **change-flow.settings** file.

Including Change Requests Based On Other Criteria

You can define other criteria that HP Release Control should consider when determining whether or not to include a change request in collision calculations. You define such criteria using the **shouldCalcCollision** function.

For example, you might want to exclude tickets of type **Release**, which do not need to undergo collision analysis.

To exclude tickets of this type:

- 1 Open the **change-flow.js** script (<HP Release Control installation directory>\conf\scripts.ext\).

2 Define the **shouldCalcCollision** function as follows:

```
function shouldCalcCollision(prevChange, newChange){
    if (newChange.getField("change-types-orig").equalsIgnoreCase("Release")){
        return false;
    }
    return true;
}
```

3 Save the **change-flow.js** script.

For a detailed explanation of the objects that can be configured in the **shouldCalcCollision** function, refer to the **GenericRFC** class in the **API_Reference.chm** file, located in the <HP Release Control installation directory>\documentation folder.

Calculating Change Request Collisions

Change request collisions are calculated based on resource scheduling conflicts. If two or more change requests share a common key element, and their scheduled start and stop times overlap, or are very close to each other, these change requests are known to collide.

You customize the way in which HP Release Control identifies and calculates change request collisions in the <collision-calculation> section of the **change-flow.settings** file (<HP Release Control installation directory>\conf\).

This section describes how to configure collision calculation properties.

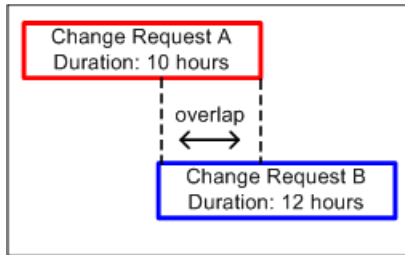
It includes:

- “Configuring Collision Proximity Levels” below
- “Configuring Causes of Collisions” on page 181
- “Configuring Collisions Severity Levels” on page 182

Configuring Collision Proximity Levels

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

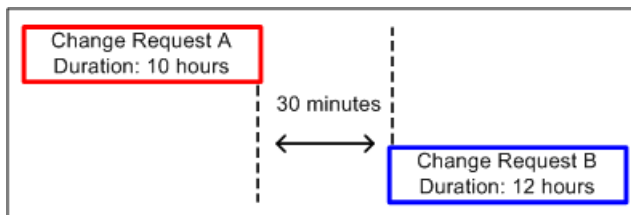
- **Overlap.** The two change requests have overlapping schedules.



- **Overlap Warning.** In reality, planned changes often exceed their original planned duration, which can result in an unforeseen overlap between two change request schedules. When 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 each other when the time gap between them is shorter than 10% of the duration of the earlier change request.

In the illustration below, the gap between the Change Request A and Change Request B is 30 minutes, which is less than 10% of the duration of Change Request A. The proximity level between the two change requests is defined as **Overlap Warning**.



You configure the definition of an **Overlap Warning** in the `<warning-ratio>` element of the `change-flow.settings` file's `<collision-calculation>` section.

```
<collision-calculation version="4.0">
...
<warning-ratio>1.1</warning-ratio>
```

By setting a value for the `<warning-ratio>` element, you define the time gap according to which HP Release Control determines whether two change requests are in close proximity (proximity level of **Overlap Warning**).

The default warning ratio is **1.1**. This means that the change requests are considered to be within close proximity when the time gap between the first and second change requests is shorter than 10% of the duration of the first change request.

To increase the proximity time gap to 25% of the duration of the first change request, for example, set the warning ratio to **1.25**.

Configuring Causes of Collisions

Two change requests in close proximity to each other are not necessarily considered to collide. They could be taking place at the same time without having any effect on one another. Change requests collide only if they are in close proximity to each other AND 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.

Note: If you are working with HP Release Control without HP Universal CMDB, ACIs are not detected.

- **Affected Business CI.** Two change requests affect at least one common business CI.

If at least one of the CIs associated with a business CI is a CCI, the business CI is referred to as a directly affected business CI (DAB). If all of the CIs associated with an business CI are ACIs, the business CI is referred to as an indirectly affected business CI (IAB).
- **Implementor.** The same implementor is responsible for implementing both change requests.
- **Specified field value.** The value of a predefined or customized field that you specify is identical for both change requests.

Configuring Collisions Severity Levels

HP Release Control determines the severity of a collision based on the elements causing the collision and the proximity between the colliding change requests. By default, collision severity levels are configured as follows:

Elements Causing Collisions	Proximity Level	
	Overlap	Overlap Warning
CCI-CCI	Critical	Critical
CCI-ACI	High	High
ACI-ACI	None	None
DAB-DAB	High	High
IAB-DAB	Medium	Medium
IAB-IAB	Low	Low

Elements Causing Collisions	Proximity Level	
	Overlap	Overlap Warning
Implementor	Medium	Very Low
<Customer-Defined> (see note below)	Customer-defined	Customer-defined

For example, if change requests share a common changed CI (**CCI-CCI**) and their proximity level is defined as **Overlap**, the severity of the collision is **Critical**.

Note:

- If there is more than one element causing a collision, the severity is determined by the collision with the highest severity.
 - If you define one or more fields as collision causes, for each field you must specify the collision severity level per proximity level. For example, if you add the field **Location** as a collision cause, you must specify the collision severity for both an **Overlap** and an **Overlap Warning** related to the location.
-

You can change the way in which HP Release Control determines the severity level for any combination of collision cause and proximity level.

To configure collision severity levels:

- 1 Open the **change-flow.settings** file (located in <HP Release Control installation directory>\conf\).

2 In the **<collision-calculation>** section, locate **<collision-types>**.

```
<collision-calculation version="4.0">
...
<collision-types>
  <collision-type>
    <type-name>CCI_CCI</type-name>
    <proximity-severity-correlations>
      <proximity-severity-correlation>
        <proximity>OVERLAP</proximity>
        <severity>CRITICAL</severity>
      </proximity-severity-correlation>
      <proximity-severity-correlation>
        <proximity>OVERLAP_WARNING</proximity>
        <severity>CRITICAL</severity>
      </proximity-severity-correlation>
    </proximity-severity-correlations>
  </collision-type>
</collision-types>
</collision-calculation>
```

The **<collision-type>** element includes the following sub-elements:

- **<type-name>**. The element causing the collision. The following collision causes are defined by default:

Cause	Description
CCI_CCI	Two change requests involve at least one common changed CI (CCI)
CCI_ACI	The same CI is changed by one change and affected by another
ACI_ACI	Two change requests involve at least one common affected CI (ACI)
IAB_IAB	Two change requests indirectly affect at least one common business CI (IAB)
IAB-DAB	The same business CI is indirectly affected by one change and directly affected by another
DAB-DAB	Two change requests directly affect at least one common business CI (DAB)

Cause	Description
IMPLEMENTOR	The same implementor is responsible for implementing both change requests
FIELD	<p>A specified field has the same value in both change requests.</p> <p>You specify the field you want to define as a collision cause using the <field-name> element, which is inserted directly below the <type-name> element. For example, to define the Location field as a collision cause, you would enter the following:</p> <pre><type-name>FIELD</type-name> <field-name>location</field-name></pre> <p>Note:</p> <ul style="list-style-type: none"> ➤ You must enter the field name as it is defined in the Administration module's Field tab. For details on defining field names, see "Creating or Modifying Change Request Fields" on page 59. ➤ You can specify only those fields whose values are in numeric or short text format. ➤ Collisions are calculated based on the specified field only for new change requests entering the system or for change requests that are updated as a result of an impact analysis following the configuration of this collision cause. Change requests that already exist in the system are not included in collision calculations based on the specified field, and are not updated after configuration of this collision cause.

Important: You can exclude a particular **type-name** from collision calculations by commenting out the **<collision-type>** element containing that **type-name**. By default, the **<collision-type>** element containing the **ACI_ACI** type-name is commented out. This means that if two change requests involve a common ACI, HP Release Control, by default, does not consider this to be a collision.

When you comment out a **<collision-type>** element, previous collision calculations based on this type are displayed in the Collisions tab, but no new collision calculations are performed based on this type. Similarly, previously defined filters including this collision type do function, but you cannot create new filters based on this collision type.

- **proximity-severity-correlations.** For each collision cause defined in the **<type-name>** element, you specify a proximity level and an associated severity level by defining the following sub-elements:
 - **proximity.** The proximity level of the colliding change requests. This can be defined as either **OVERLAP** or **OVERLAP_WARNING**. For more information about collision proximity levels, see “Configuring Collision Proximity Levels” on page 180.
 - **severity.** The severity level of the collision as outlined in the table on page 182. The severity level can be defined as: **CRITICAL**, **HIGH**, **MEDIUM**, **LOW**, or **VERY_LOW**.

The following definition stipulates that if the cause of the collision was two change requests directly affecting a common business CI (DAB_DAB) and the proximity level of the collision was **Overlap**, then the collision severity level should be defined as **Critical**.

```
<collision-types>
  <collision-type>
    <type-name>DAB_DAB</type-name>
    <proximity-severity-correlations>
      <proximity-severity-correlation>
        <proximity>OVERLAP</proximity>
        <severity>CRITICAL</severity>
      </proximity-severity-correlation>
    </proximity-severity-correlations>
  </collision-type>
```


14

Configuring Risk Analysis

HP Release Control performs risk analysis on each change request, enabling change managers to compare change requests in terms of the risks involved in their implementation.

This chapter includes:

- Understanding Risk Analysis on page 189
- Example of Risk Analysis Calculation on page 190
- Defining Risk Factors on page 193
- Testing Risk Factors on page 197
- Configuring Risk Calculation Properties on page 198
- Adding Operations Before Risk Analysis on page 199

Understanding Risk Analysis

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

$$\text{Calculated Risk} = \text{Potential Damage} \times \text{Probability of Failure}$$

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 Release Control 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.

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 Release Control 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 Release Control.

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 Release Control 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 Release Control calculates a weighted value for each factor using the following formula:

$$\text{Weight/Total Weight} \times \text{Score} = \text{Weighted Value}$$

where:

- **Weight** is the weight assigned to the risk factor during the HP Release Control 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 Release Control 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:

$$4/20 \times 10 = 2$$

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.

Defining Risk Factors

You use the Administration module's Risk Factors tab to define risk factors to be used in the risk calculation. The Risk Factors tab is divided into the following sections:

- **Factors table.** Contains a list of the available risk factors. When you select a risk factor in the table, the definitions of that risk factor are displayed in the Factor Definition pane. For a risk factor to be included in the risk calculation, the check box next to the risk factor must be selected.

- **Factor weight distribution pie chart.** Displays the weight of each factor in the risk calculation.
- **Factor Definition pane.** You define the properties of each risk factor in this pane.
- **Mapping Definition section.** You define mapping rules for the selected risk factor that translate the source data into factor values between 0 and 10.

To modify or create a risk factor:

- 1 Above the Factors table, select either the **Damage Factors** or **Failure Probability** tab, depending on the type of risk factor you want to create or modify.
- 2 Select an existing risk factor from the Factors table, or click the **Add Factor** button to create a new risk factor.
- 3 Define or modify the following risk factor properties in the Factor Definition pane:



Property	Description
Name	The name of the risk factor. This is the name displayed in the Analysis module's Risk tab.
Description	A description of the risk factor to be displayed in the Potential Damage or Probability of Failure section of the Analysis module's Risk tab.
Weight	The relative weight of the risk factor to be used in the risk calculation.

Property	Description
Source	<p>You can choose one of the following sources of data:</p> <ul style="list-style-type: none"> ➤ Field. A specific change request field whose data originates in the service desk application. ➤ Planned Duration (Hours). The planned duration of the change request (from the planned start to the planned end). This is calculated by HP Release Control. ➤ Number of CCIs. The number of CIs that will be directly affected as a result of the change request. This is calculated by HP Release Control. ➤ Importance of directly affected business CIs. The overall importance of the business CIs that are directly affected by the change. ➤ Importance of indirectly affected business CIs. The overall importance of the business CIs that are indirectly affected by the change. <p>Note: An importance level is assigned to each business CI in the Administration module's business CIs tab. For details, see "Assigning Importance Levels to Business CIs" on page 146.</p>
Field name	The name of the change request field (if you selected Field as your data source).
Map by	You can either map by range or by value. When you map by value, you map a factor value for each possible source value. When you map by range, you map a factor value for each range of source values.

- 4 In the **Mapping Definition** section, map the source values or ranges to risk factor values between 1 and 10.



To add a new mapping definition entry, click the **Add Entry** button and define the mapping definitions in the new row that is created in the Mapping Definition section.

- 5 In the **Default Mapping** list, select a default risk factor value for cases in which the field value is not mapped. To ignore the risk factor in such a case, select **Disregard**.

- 6 You can run test risk calculations to help you understand the implications of your risk factors before deciding whether or not to save them. For more information, see “Testing Risk Factors” on page 197.
- 7 Ensure that you are satisfied with all your changes.



- If you are not satisfied with your changes, you can undo any changes you made by clicking the **Refresh and Undo Modifications** button before you save your changes.

Note: When you click the **Refresh and Undo Modifications** button, all the changes you made since the last time you saved your settings are lost.



- If you are satisfied with your changes, you can commit the changes to the server by clicking the **Save Settings** button. A message opens asking you to confirm that you want to save these changes. Bear in mind that once you save these changes, they cannot be undone. Click **Yes** to save the changes.

Note: Saving the changes does not update the risk calculations. In order to update the risk calculations, see below.



You can recalculate the risk for all change requests based on your new settings by clicking the **Recalculate Risk** button. A message opens informing you of the number of change requests for which risk will be recalculated. Confirm that you want to continue recalculating the risk.

Note: If you click the **Recalculate Risk** button during the risk recalculation process, a message opens informing you of the remaining number of change requests for which risk still needs to be recalculated.



When risk factors are calculated, the risk factor's numeric value is tied to a risk level (**low**, **medium**, or **high**). To configure which numeric values correspond to which levels click the **Risk Thresholds** button. The **Define Risk Thresholds** dialog box opens.



The green section corresponds to the **low** risk level, the yellow section to **medium**, and the red section to **high**. Drag and drop the arrows to adjust the thresholds for each level.

Testing Risk Factors

You can test risk factors before saving them by importing sample change requests and running the risk calculations on them.

To test risk factors



- 1 In the Test Risk Factors pane, click the **Add Sample Change Requests** button. The Add Sample Change Requests dialog box opens.
- 2 Select sample change requests to test the risk factors by either selecting a filter from the drop-down menu or entering a change request ID. Click **OK** to add the change requests. If change requests are added by using the filtering option, only the first 10 requests will be displayed.



If needed, you can delete change requests from the Test Risk Factors pane by clicking the **Delete** button.



- 3 To run the test on the change requests, click the **Simulate Risk Calculation** button. The risk calculations are updated.
- 4 Each change request is displayed on its own row with details displayed in columns. Each risk factor, along with its calculated score, is displayed in a separate column on the right.

Configuring Risk Calculation Properties

By default, risk is calculated for change requests that have the default statuses defined in the **HP Release Control installation directory>\conf\enumerations.settings**. You can change the definitions for which risk should be calculated using the **shouldCalcRisk** function in the **HP Release Control installation directory>\conf\scripts.ext\change-flow.js** script.

For example, you can instruct HP Release Control not to calculate risk for change requests that have been approved or closed by not including these statuses in the **shouldCalcRisk** function:

```
function shouldCalcRisk(prevChangeInfo, changeInfo)
{
  status= changeInfo.getField("status");
  shouldCalc= (status==STATUS_ASSIGNED || status==STATUS_PENDING_APPROVAL
||status==STATUS_IN_PROGRESS);
  return shouldCalc;
}
```

If required, you can instruct HP Release Control to calculate risk for new changes requests that have entered HP Release Control by including the following lines as part of the **shouldCalcRisk** function:

```
if (prevChangeInfo==null)
  shouldCalc= true;
```

You can use the **overrideRisk** function in the **change-flow.js** script to instruct HP Release Control to override the standard risk calculation. For example, you can instruct HP Release Control to assign the maximum risk value to a change request that affects a specific business CI, as the following script illustrates:

```
function overrideRisk(prevChangeInfo, changeInfo, analysis, result)
{
  if (changeInfo.getField("is-sox-app-involved").equalsIgnoreCase("Yes")){
    result.addRule("Sox Application - max risk");
    result.risk= 100;
  }
}
```

For an explanation of the objects that can be included in both the **shouldCalcRisk** and **overrideRisk** functions, refer to the **RiskAnalysis**, **RawRiskFactorCalculationResult**, and **OverrideRulesResult** classes in the **API_Reference.chm** file, located in the <HP Release Control installation directory>\documentation folder.

Adding Operations Before Risk Analysis

Based on your impact analysis calculations, you may want to perform certain operations prior to every risk analysis. For example, you may want to update certain CI data prior to calculating risk if that data will affect the risk analysis.

The **preCalcRisk** function within the <installation directory>\conf\scripts.ext\change-flow.js script contains the location in which you can add operations to be performed before each risk analysis. By default, this function is empty, meaning that no operations are automatically performed before each risk analysis. It receives two arguments which are both writable **WritableGenericRFCImpl** arguments.

```
function preCalcRisk(prevChange, newChange){  
}
```

For a detailed explanation of the objects that can be included in this function, refer to the **WritableGenericRFCImpl** class in the **API_Reference.chm** file, located in the docs\pdfs directory of the HP Release Control.

15

Configuring Similar Changes Analysis

HP Release Control automatically identifies and compares elements which are common to all change requests, and generates a list of existing changes which are found to be similar to any proposed change request.

By comparing a proposed change against this list of similar changes, you can make use of historical data to gain insight into the nature of the proposed change, and therefore better predict its likely outcome.

This chapter describes how to configure the analysis of similar changes.

This chapter includes:

- Understanding How the Similarity Calculation Works on page 201
- Configuring Similarity on page 202

Understanding How the Similarity Calculation Works

HP Release Control automatically identifies change requests involving common key elements. The definitions of these common elements are then compared to each other, and this comparison yields a proximity value. This value is always between **0** and **1** and represents the extent to which the requests are similar.

This proximity value is then matched up against a threshold value, which you define. This threshold value sets the minimum proximity value which will result in the compared requests being considered similar.

In other words, when the proximity value between two changes is equal to or higher than the threshold, then the changes are considered to be similar for the purposes of the Similar Changes feature. Should the proximity value be less than the threshold, then the changes are not considered to be similar.

For example, If a comparison between the common elements of **Change A** and **Change B** yields a proximity value of **0.7**, and the defined threshold for minimum similarity is **0.5**, then **Change A** and **Change B** are considered to be similar, since their proximity value is higher than the minimum value defined for similarity.

Configuring Similarity

You can customize the way in which HP Release Control identifies and calculates similar changes in the `<similarity-settings>` section of the `<HP Release Control installation directory>\conf\similarity settings`.

```
<settings>
  <similarity-settings>
    <threshold>0.5</threshold>
    <calculators>
      <field field-name="collision-severity"/>
      <numeric-field field-name="calculated-risk" zero-distance="5"/>
      <text-field field-name="description"/>
      <implementor-set/>
      <CCI-set/>
      <DAA-set/>
    </calculators>
  </similarity-settings>
</settings>
```

- For the threshold element, you enter a value between **0** and **1**. This value defines the minimum level of proximity between requests that can be considered similar, where **0** means the requests are not at all similar, and where **1** means perfect similarity. In order for two requests to be considered similar, their proximity value must meet or exceed this threshold.

- In the elements that appear under **calculators**, you define which common elements HP Release Control compares between requests. The proximity value calculation takes all these elements into account, and the final proximity value is a composite of each elements level of proximity.
 - **field name.** You can enter any string, enumeration, boolean, and so on.
 - **numeric field.** You define the range in which numeric values between changes are to be considered similar. This element is divided into two parts:
 - **name.** You enter the name of any numeric field as defined in your system settings.
 - **zero-distance.** Once you enter a numeric field, the zero distance value is the value range either side of the proposed change's field value that is considered relevant when calculating proximity.

 For example, if the numeric field is **calculated risk** and the calculated risk value of the proposed change is **10**, and the zero distance is **5**, then only other changes with calculated risk values between **5** and **15** are considered relevant for the proximity value calculation.
 - **text field.** You can enter either the **summary** or the **description** fields.
 - **implementor.** This element is pre-defined and cannot be edited.
 - **CCI.** This element is pre-defined and cannot be edited.
 - **DAA.** This element is pre-defined and cannot be edited.

Part V

Configuring Collaboration and Review Settings

16

Configuring the Automatic Creation of Action Items

By default, HP Release Control automatically creates action items from certain change requests and assigns these items to specific HP Release Control users. This chapter describes how to modify the conditions for the automatic creation of action items.

This chapter includes:

- About Configuring the Automatic Creation of Action Items on page 208

About Configuring the Automatic Creation of Action Items

By default, HP Release Control automatically creates action items from certain change requests and assigns these items to specific HP Release Control users. You can modify the conditions for the automatic creation of action items in the **<HP Release Control installation directory>\conf\scripts.ext\change-flow.js** script, using the **addActionItemsOnChange** function.

By default, the **addActionItemsOnChange** function instructs HP Release Control to compare each new change request (that is not a surrogate request) of a specified status to the version of the request that was previously collected. If the impact severity of a change was equal or greater than a specified severity and the calculated risk increased beyond a specified threshold, HP Release Control is instructed to create an action item for the users associated with the business CIs affected by the change request.

```
function addActionItemsOnChange(prevChange, newChange, actionItemsContext){
    if(prevChange != null || newChange.getChangeCategory() ==
    CHANGECATEGORY_SURROGATE) return;

    statusIsPendingApproval = newChange.getField("status") == STATUS_PENDING_APPROVAL;
    threshold = 0;
    riskAboveThreshold = (newChange.getField("calculated-risk") > threshold);

    if(statusIsPendingApproval && riskAboveThreshold){
        users = newChange.getAffectedUsersAboveSeverityAsArray(SEVERITY_LOW);
        for(i=0; i<users.length; i++){
            assignee = users[i];
            actionItem = newChange.createActionItem(assignee);
            actionItem.setCreator("ccmadmin");
            actionItem.setAutoClose(true);
            actionItem.setDeadlineTimeStamp(newChange.getField("planned-start-time"));
            actionItem.setActionItemPriority(ACTIONITEM_PRIORITY_NORMAL);
            actionItem.setSubject("Please check the impact on this change from your side");
            actionItemsContext.addActionItem(actionItem);
        }
    }
}
```


The following properties are assigned to the action item:

- **Assignee.** By default, the user associated with the business CIs affected by the change request.
- **Creator.** By default, the HP Release Control administrator.
- **Due date.** By default, the planned start time of the new change request.
- **Priority.** By default, normal level priority.

For an explanation of the objects that can be used in the **addActionItemsOnChange** function, refer to the **GenericRFC** class in the **API_Reference.chm** file, located in the <HP Release Control installation directory>\documentation folder.

17

Configuring Change Request Approval

This chapter describes how to configure change request approval.

This chapter includes:

- About Approving Requests on page 212
- Configuring Request Approval with HP Service Manager on page 213
- Configuring Request Approval with HP Project and Portfolio Management on page 219
- Configuring Request Approval Without Updating the Service Desk on page 224

About Approving Requests

You can configure HP Release Control to allow users to approve change requests or retract the approval of change requests.

If you are working with the following service desk applications, the approval of requests within HP Release Control results in an updated status of the request within the service desk application:

- HP Service Center 6.x / HP Service Manager 7.0
- HP Project and Portfolio Management 7.x/IT Governance Center Web Services 6.x

If you are not working with one of the above service desk applications, you can configure request approval in HP Release Control, but the approval status of the request will not be updated in the service desk application.

You configure request approval based on the service desk application you are using:

- If you are using HP Service Center 6.x / HP Service Manager 7.0, see “Configuring Request Approval with HP Service Manager” on page 213.
- If you are using HP Project and Portfolio Management 7.x/IT Governance Center Web Services 6.x, see “Configuring Request Approval with HP Project and Portfolio Management” on page 219.
- If you are using other service desk applications, see “Configuring Request Approval Without Updating the Service Desk” on page 224

Note: To check whether your service desk application supports this feature, contact Customer Support.

Configuring Request Approval with HP Service Manager

This section describes how to configure change request approval if you are working with HP Service Manager 7.0. / HP Service Center 6.x.

To configure change request approval with HP Service Manager (HP Service Center):

- 1** Assign the role of **Change Approver** to the users who are meant to approve requests. For details, see “Configuring User Settings” on page 250.
- 2** Configure both HP Release Control and HP Service Manager (HP Service Center) to check whether a request can be approved. For details, see “Enabling the Possibility of Request Approval (HP Service Manager)” on page 213.
- 3** Configure both HP Release Control and HP Service Manager to perform request approval. For details, see “Enabling the Execution of Request Approval (HP Service Manager)” on page 218.

Enabling the Possibility of Request Approval (HP Service Manager)

Before performing a request approval or approval retraction operation, HP Release Control and your service desk application must determine that the request can, in fact, be approved (or approval retracted) at the current time by the current user.

You configure both HP Release Control and HP Service Manager to check whether a request can be approved, or an approval retracted.

- To configure HP Release Control, see “Configuring HP Release Control” on page 214.
- To configure HP Service Manager, “Configuring HP Service Manager (ServiceCenter)” on page 215.

Configuring HP Release Control

You configure HP Release Control to check whether requests can be approved, or whether an approval can be retracted, within the adapter configuration file.

To configure HP Release Control to check whether a request can be approved, or whether an approval can be retracted:

- 1** Open the adapter configuration file, by default, **<HP Release Control installation directory>\conf\servicemanager-ws-adapter.settings**.
- 2** Locate the **canApprove** and **canRetract** operations.
- 3** Ensure that the appropriate service desk application connectors are included in the appropriate **<connector-type>** elements:
 - To enable HP Release Control to check whether a top-level or parent change request can be approved, or whether the approval can be retracted, in HP Service Manager, ensure that under the **<request-type level="1">** element:
 - **<connector-type>ServiceCenterChangeCanApprove</connector-type>** is included in a **canApprove** operation
 - **<connector-type>ServiceCenterChangeCanRetract</connector-type>** is included in a **canRetract** operation
 - To enable HP Release Control to check whether a second-level or child change request can be approved, or whether the approval can be retracted in HP ServiceCenter/Service Manager, ensure that under the **<request-type level="2">** element:
 - **<connector-type>ServiceCenterTaskCanApprove</connector-type>** is included in a **canApprove** operation
 - **<connector-type>ServiceCenterTaskCanRetract</connector-type>** is included in a **canRetract** operation
- 4** Save the adapter configuration file.
- 5** Reload the adapter configuration file by clicking the **Reload Adapters** button. in the Administrator module's **Fields** tab.



Configuring HP Service Manager (ServiceCenter)

You configure HP Service Manager to allow HP Release Control to check whether requests can be approved, and whether an approval can be retracted. This configuration should be performed by the HP Service Manager administrator.

Note: We recommend that you configure HP Service Manager as described in this section.

However, if you want to avoid having to configure HP Service Manager, you can instruct HP Release Control to use a script to check whether a request can be approved, or whether an approval can be retracted. For details, see “Configuring HP Release Control” on page 220.

To configure HP Service Manager:

- 1 Load HP Service Manager’s **ccm_can_approve_operations** unload file, located in the <HP Release Control installation directory>\examples\service-desk-examples\ServiceManager\7.0\extensions directory. (For details on loading unload files, see the HP Service Manager documentation.)

When you load this unload file, the **ccm.check.retract** and **ccm.check.approval** processes are created in HP Service Manager.

Note: If the **ccm_can_approve_operations** file fails to load, you must create these processes manually. For details, see “Creating the Approval/Retraction Processes Manually” on page 216.

- 2 Associate a display action with each of the two new processes, **ccm.check.approval** and **ccm.check.retract**:
 - a Open the Document Engine.
 - HP Service Manager 7.0: Menu navigation > Tailoring > Document Engine

- **ServiceCenter 6.x: Menu navigation > Utilities > Tools**
 - b** In the **Objects** menu, select the **cm3r** object.
 - c** In the **Object Info** tab, select **Default State**, and click the **Find** button.
 - d** Find the **checkapproval** display action, and associate it with the **ccm.check.approval** process.
 - e** Find the **checkretract** display action, and associate it with the **ccm.check.retract** process.
 - f** Repeat steps (b) through (e) for the **cm3t** object.
- 3** In WSDL Configuration, add the approval and retraction actions:
- a** Open the WSDL Configuration page.
 - **HP Service Manager 7.0: Menu navigation > Tailoring > WSDL Configuration**
 - **ServiceCenter 6.x: Menu navigation > Toolkit > WSDL Configuration**
 - b** Add the following four actions:

Object Name	Allowed Action	Action Name
cm3r	checkapproval	CanApprove
cm3r	checkretract	CanRetract
cm3t	checkapproval	CanApprove
cm3t	checkretract	CanRetract

Creating the Approval/Retraction Processes Manually

If the **ccm_can_approve_operations** file described in the above procedure fails to load, you must create the **ccm.check.retract** and **ccm.check.approval** processes manually.

To create the processes manually:

- 1** Navigate to the Document Engine's Processes page, using the following path:
 - **HP Service Manager 7.0: Menu navigation > Tailoring > Document Engine > Processes**).

➤ **ServiceCenter 6.x: Menu navigation > Utilities > Tools**

2 In the **Process Name** box, type **ccm.check.retract**.

3 In the **Initial Expression** tab, set the initial expression to:

```
$L.void=rtcall("intersect", $L.err, $L.retract.intersect, approval.groups in $L.env,
approved.groups in $L.file)
if (lng($L.retract.intersect)>0 and open in $L.file=true or approve.override in $L.env)
then ($scan.retract="normal") else ($scan.retract="no auth")
```

4 In the **Final Expression** tab, set the Final Expression to:

```
$L.exit=$scan.retract
```

5 Repeat steps 2 through 4 for the **ccm.check.approval** process, as follows:

➤ **Process Name: ccm.check.approval**

➤ **Initial Expression:**

```
$L.void=rtcall("intersect", $L.err, $L.approval.intersect, approval.groups in $L.env,
current.pending.groups in $L.file)
if (lng($L.approval.intersect)>0 and open in $L.file=true or approve.override in
$L.env) then ($scan.approve="normal") else ($scan.approve="no auth")
```

➤ **Final Expression:**

```
$L.exit=$scan.approve
```

Enabling the Execution of Request Approval (HP Service Manager)

This section describes how to configure both HP Release Control and HP Service Manager to perform request approval/approval retraction.

Configuring HP Release Control

You configure HP Release Control to approve requests/retract approvals within the adapter configuration file.

To configure HP Release Control to approve/retract a request:

- 1** Open the adapter configuration file, by default, **<HP Release Control installation directory>\conf\servicemanager-ws-adapter.settings**.
- 2** Locate the **approve** and **retract** operations and ensure that the appropriate service desk application connectors are included in the appropriate **<connector-type>** elements:
 - If you are working with HP Service Manager:
 - To enable the approval of top-level or parent change requests, ensure that **<connector-type>ServiceCenterChangeApprove</connector-type>** is included in an **approve** operation under the **<request-type level="1">** element.
 - To enable the retraction of top-level or parent change request approvals, ensure that **<connector-type>ServiceCenterChangeRetract</connector-type>** is included in a **retract** operation under the **<request-type level="1">** element.
 - To enable the approval of second-level or child change requests, ensure that **<connector-type>ServiceCenterTaskApprove</connector-type>** is included in an **approve** operation under the **<request-type level="2">** element.
 - To enable the retraction of second-level or child change request approvals, ensure that **<connector-type>ServiceCenterTaskRetract</connector-type>** is included in a **retract** operation under the **<request-type level="2">** element.

- 3 To ensure that the updated approved requests/retracted approvals are of a high priority in the queue of requests being sent to HP Release Control, specify **updateOperation=true** within the **<sender-properties>** element.
- 4 Save the changes you made to the adapter configuration file.
- 5 Reload the adapter configuration file by clicking the **Reload Adapters** button. in the Administrator module's **Fields** tab.



Configuring HP Service Manager (ServiceCenter)

You must configure HP Service Manager to allow HP Release Control to approve requests/retract approvals. This configuration should be performed by the HP Service Manager administrator.

To configure HP Service Manager:

- 1 In WSDL Configuration, select the **ChangeManagement** Web service and ensure that the approve/retract action is allowed for the **cm3r** and **cm3t** objects.
- 2 Ensure that the SOAP API is enabled for each user with HP Release Control **Approver** status.

Configuring Request Approval with HP Project and Portfolio Management

This section describes how to configure change request approval if you are working with HP Project and Portfolio Management 7.x/IT Governance Center Web Services 6.x.

To configure change request approval with HP Project and Portfolio Management (IT Governance Center Web Services):

- 1 Assign the role of **Change Approver** to the users who are meant to approve requests. For details, see “Configuring User Settings” on page 250.
- 2 Configure both HP Release Control and HP Project and Portfolio Management to check whether a request can be approved. For details, see “Enabling the Possibility of Request Approval (HP Project and Portfolio Management)” on page 220.

- 3 Configure both HP Release Control and HP Project and Portfolio Management to perform request approval. For details, see “Enabling the Execution of Request Approval (HP Project and Portfolio Management)” on page 222.

Enabling the Possibility of Request Approval (HP Project and Portfolio Management)

Before performing a request approval or approval retraction operation, HP Release Control and your service desk application must determine that the request can, in fact, be approved (or approval retracted) at the current time by the current user.

If you are working with HP Project and Portfolio Management/IT Governance Center Web Services, you instruct HP Release Control to use a script in order to check whether a request can be approved, or whether the approval can be retracted.

Note: Retraction of a request approval is supported in HP Project and Portfolio Management/IT Governance Center Web Services only if there is a transition from the **Approved** step to the **Pending Approval** step within the HP Project and Portfolio Management/IT Governance Center Web Services workflow.

Configuring HP Release Control

You configure HP Release Control to check whether requests can be approved, or whether an approval can be retracted, within the adapter configuration file.

To configure HP Release Control to check whether a request can be approved, or whether an approval can be retracted:

- 1 Open the adapter configuration file, by default, `<HP Release Control installation directory>\conf\itg-ws-adapter.settings`.
- 2 Locate the **canApprove** and **canRetract** operations.

3 Ensure that the appropriate service desk application connectors are included in the appropriate **<connector-type>** elements:

- If you are working with HP Project and Portfolio Management/IT Governance Center Web Services, you use the **canApproveScriptingConnector** and **canRetractScriptingConnector** connector types and instruct HP Release Control to use a script in order to check whether a request can be approved, or whether an approval can be retracted. If you use this method, HP Release Control does not need to access the service desk application itself.

```
<connector-type>canApproveScriptingConnector</connector-type>
<properties>
  scripts=canApproveChange.js
</properties>

<connector-type>canRetractScriptingConnector</connector-type>
<properties>
  scripts=canRetractChange.js
</properties>
```

The following API can be used in the **canApproveChange.js** script:

```
function canApprove(rawTicket,genericRFC,userLoginName)
{
  return true;
}
```

The following API can be used in the **canRetractChange.js** script:

```
canRetract(rawTicket,genericRFC,userName)
{
  return true;
}
```

The **rawTicket** class relates to the service desk application change request before its conversion to an HP Release Control format. The **genericRFC** class relates to the service desk application change request after its conversion to an HP Release Control format. The **userLoginName** class relates to the user name of the user logging in to the service desk application.

For a detailed explanation of the objects that can be included in each class, refer to the **API_Reference.chm** file, located in the <HP Release Control installation directory>\documentation folder.

- 4 Save the adapter configuration file.
- 5 Reload the adapter configuration file by clicking the **Reload Adapters** button. in the Administrator module's **Fields** tab.



Enabling the Execution of Request Approval (HP Project and Portfolio Management)

Before you configure request approval, make sure that:

- The user with which you instruct HP Release Control to connect to the HP Project and Portfolio Management/IT Governance Center database has write permissions to the database.
- Your HP Project and Portfolio Management/IT Governance Center Web Services workflow contains a transition from the **Approved** step to the **Pending Approval** step.

You configure HP Release Control to approve requests/retract approvals within the adapter configuration file.

To configure HP Release Control to approve/retract a request:

- 1 Open the adapter configuration file (by default, **itg-ws-adapter.settings** for HP Project and Portfolio Management/IT Governance Center Web Services).
- 2 Locate the **approve** and **retract** operations and ensure that the appropriate service desk application connectors are included in the appropriate <connector-type> elements:

- If you are working with HP Project and Portfolio Management/IT Governance Center Web Services:
 - To enable the approval of change requests, ensure that `<connector-type>itgApprove</connector-type>` is included in an **approve** operation
 - To enable the retraction of change request approvals, ensure that `<connector-type>itgRetract</connector-type>` is included in a **retract** operation

3 If you are working with HP Project and Portfolio Management/IT Governance Center Web Services, you must define the following properties within the `<properties>` element:

Property Name	Description	Default Value
dbUrl (mandatory)	The URL of the HP Project and Portfolio Management/IT Governance Center database.	—
username (mandatory)	The user name with which HP Release Control connects to the HP Project and Portfolio Management/IT Governance Center database.	—
password (mandatory)	The password with which HP Release Control connects to the HP Project and Portfolio Management/IT Governance Center database. Note: The password should be encrypted. For details on encrypting passwords, see Appendix A, “Password Encryption.”	—
driverClassName (mandatory)	The name of the JDBC driver. Do not modify the default value.	com.mercury.jdbc.MercOracleDriver

Property Name	Description	Default Value
sourceStepSequence (mandatory)	The source step number from which approval is performed. Either this or the sourceStepName must be provided. For sub-workflows, specify <parent workflow step>.<sub-workflow step>. For example, 5.5	—
sourceStepName (mandatory)	The name of the source step from which approval is performed. Either this or the sourceStepSequence must be provided.	—
actionName (mandatory)	The action that must be performed within the HP Project and Portfolio Management/IT Governance Center application in order for the request to be approved.	—

- 4 To ensure that the updated approved requests/retracted approvals are of a high priority in the queue of requests being sent to HP Release Control, specify **updateOperation=true** within the <sender-properties> element.
- 5 Save the changes you made to the adapter configuration file.
- 6 Reload the adapter configuration file by clicking the **Reload Adapters** button. in the Administrator module's **Fields** tab.



Configuring Request Approval Without Updating the Service Desk

This section describes how to configure change request approval if you are working with service desks other than HP Service Center 6.x / HP Service Manager 7.0 or HP Project and Portfolio Management 7.x/IT Governance Center Web Services 6.x.

To configure change request approval:

- 1 Open the relevant service desk adapter configuration file.

2 Configure HP Release Control to check whether a request can be approved.

- a** In the adapter configuration file, include the following operation in the operations section:

```
<operation name="canApprove">
  <operation-type>alwaysCanApproveOperation</operation-type>
</operation>
```

- b** You configure the **canApprove** function in the **<HP Release Control installation directory>\conf\scripts.ext\sdOperations.js** script. For example:

```
function canApprove(genericRFC, userLoginName) {

    var status = genericRFC.getField("status");
    return (status == STATUS_PENDING_APPROVAL);

}
```

For a detailed explanation of the objects that can be included in this function, refer to the **API_Reference.chm** file, located in the **<HP Release Control installation directory>\documentation** folder.

3 Configure HP Release Control to check whether approval for a request can be retracted.

- a** In the adapter configuration file, include the following operation in the operations section:

```
<operation name="canRetract">
  <operation-type>alwaysCanRetractOperation</operation-type>
</operation>
```

- b** You configure the **canRetract** function in the **<HP Release Control installation directory>\conf\scripts.ext\sdOperations.js** script. For example:

```
function canRetract(genericRFC, userLoginName) {

    var status = genericRFC.getField("status");
    return (status == STATUS_APPROVED);

}
```

For a detailed explanation of the objects that can be included in this function, refer to the **API_Reference.chm** file, located in the **<HP Release Control installation directory>\documentation** folder.

- 4** Configure HP Release Control to perform request approval.
- a** In the adapter configuration file, include the following operation in the operations section:

```
<operation name="approve">
  <operation-type>approveOperation</operation-type>
  <properties>
    refetchTicket=false
  </properties>
  <connector>
    <connector-type>approveScriptingConnector</connector-type>
    <properties>
      scripts=approveRetractChange.js
      functionName=approve
    </properties>
  </connector>
  <sender-properties>
    updateOperation=false
  </sender-properties>
</operation>
```

- b** You configure the **approve** function in a script named **approveRetractChange.js**. For example:

```
function approve(ticket, userName, comment) {
    ticket.setField("status", STATUS_APPROVED);
}
```

- c** Save the script in the **<HP Release Control installation directory>\conf\<adapter_name>.ext** directory.

For a detailed explanation of the objects that can be included in this function, refer to the **API_Reference.chm** file, located in the **<HP Release Control installation directory>\documentation** folder.

5 Configure HP Release Control to retract approved requests.

- a** In the adapter configuration file, include the following operation in the operations section:

```
<operation name="retract">
  <operation-type>retractOperation</operation-type>
  <properties>
    refetchTicket=false
  </properties>
  <connector>
    <connector-type>retractScriptingConnector</connector-type>
    <properties>
      scripts=approveRetractChange.js
      functionName=retract
    </properties>
  </connector>
  <sender-properties>
    updateOperation=false
  </sender-properties>
</operation>
```

- b** You configure the **retract** function in a script named **approveRetractChange.js**. For example:

```
function retract(ticket) {  
  
    ticket.setField("status", STATUS_PENDING_APPROVAL);  
  
}
```

- c** Save the script in the **<HP Release Control installation directory>\conf\<adapter_name>.ext** directory.

For a detailed explanation of the objects that can be included in this function, refer to the **API_Reference.chm** file, located in the **<HP Release Control installation directory>\documentation** folder.

- 6** Save the adapter configuration file.
- 7** Reload the adapter configuration file by clicking the **Reload Adapters** button. in the Administrator module's **Fields** tab.
- 8** Assign the role of **Change Approver** to the users who are meant to approve requests. For details, see “Configuring User Settings” on page 250.



Important: Make sure that the approval status of the request is not overwritten in the service desk, when the service desk is synchronized with HP Release Control. You can do this by including the following function in the **<HP Release Control installation directory>\conf\scripts.ext\change-flow.js** script:

```
function preChangeProcess(prevChange, newChange) {  
    if (prevChange.getField("status") == STATUS_APPROVED) {  
        newChange.setField("status", STATUS_APPROVED);  
    }  
}
```

For a detailed explanation of the objects that can be included in this function, refer to the **API_Reference.chm** file, located in the **<HP Release Control installation directory>\documentation** folder.

18

Configuring Notifications

This chapter describes how to configure the sending of notifications from HP Release Control.

This chapter includes:

- About Configuring Notifications on page 229
- Configuring Notification Rules on page 230
- Configuring Other Notification Properties on page 232

About Configuring Notifications

By default, only automatic email notifications and not customized notifications are sent by HP Release Control. It is recommended, however, that you configure notifications to be sent to users who do not regularly work with HP Release Control and are therefore unlikely to view and monitor action items that are created as a result of an impact analysis. Using customized email notifications, you can inform these users of change requests that negatively affect the applications with which they are associated. You define the circumstances under which customized notifications should be sent as well as the notification recipients in the **<HP Release Control installation directory>\conf\scripts.ext\change-flow.js** script, using the **getUsersToNotify** function.

You enable/disable the notification feature and configure other notification properties in the **<notifications>** section of the **<HP Release Control installation directory>\conf\change-flow.settings** file.

You configure the format of the notifications being sent in the FTL files located in the <HP Release Control installation directory>\conf\notifications.ext directory. For more information, see “Configuring the Format of Emails” on page 271.

Configuring Notification Rules

You use the **getUsersToNotify** function in the <HP Release Control installation directory>\conf\scripts.ext\change-flow.js script to define the following:

- the circumstances under which notifications should be sent
- the recipients of the notifications
- the content of the notification messages

When enabled, the **getUsersToNotify** function, by default, instructs HP Release Control to compare each new change request of a specified status to the version of the request that was previously collected and ascertain whether the calculated risk increased beyond a specified threshold.

```
function getUsersToNotify(prevChange, newChange, notificationContext) {

    statusIsPendingApproval = (newChange.getField("status") ==
                                STATUS_PENDING_APPROVAL);

    message = "";
    riskStatusStr = "is ";

    riskIncreased = true;

    if (prevChange != null) {
        riskIncreased = (newChange.getField("calculated-risk") >
                        prevChange.getField("calculated-risk"));
        if (riskIncreased) {
            riskStatusStr = "has increased to ";
        }
    }

    threshold = 0;
    riskAboveThreshold = (newChange.getField("calculated-risk") > threshold);
}
```

Note: For details on risk calculations, see “Configuring Risk Analysis” on page 189.

If the calculated risk did increase beyond the specified threshold, the default version of the **getUsersToNotify** function instructs HP Release Control to notify all the users associated with the affected applications whose impact severity level exceeded the specified level.

```
if (statusIsPendingApproval && riskIncreased && riskAboveThreshold) {
    message = "The current status of the request is " +
        newChange.getField("status").name +
        " and the calculated risk level of the request " +
        riskStatusStr +
        " " +
        newChange.getField("calculated-risk") +
        " ";
    // Add affected users for this change request while Severity is greater than 0
    (VERY_LOW).
    // To get all affected users send -1 on: newChange.getAffectedusers()
    notificationContext.addUsers(newChange.getAffectedUsersAboveSeverity(SEVERITY
    _LOW));
}
```

If there are no users associated with these applications, the default version of the **getUsersToNotify** function instructs HP Release Control to notify the administrator.

```
} else {
    notificationContext.addUsersByRole("Administrator");
    message = "HP Change Control Management has not identified specific users that" +
        "will be notified regarding this request. " +
        "You are receiving this notification due to your role" +
        "as an HP Change Control Management administrator.\n" +
        message;
}
```

For an explanation of the objects that can be used in the **getUsersToNotify** function, refer to the **notificationContext** and **GenericRFC** classes in the **API_Reference.chm** file, located in the <HP Release Control installation directory>\documentation folder.

Configuring Other Notification Properties

By default, the notification feature is enabled. You can disable this feature and modify the notification sender and frequency in the <notifications> section of the <HP Release Control installation directory>\conf\change-flow.settings file.

To disable the HP Release Control notification mechanism:

- Change the value of the <send-notification-email-enabled> element to **false**. When you change the value of this element, no notifications are sent by HP Release Control.

To modify the notification sender:

- Enter a different value for the <notification-sender-email> element.

To modify notification frequency:

- Change the value of the <send-notifications-frequency> element (in seconds) as required.

19

Configuring Post Implementation Review

This chapter describes how to configure settings related to the Post Implementation Review (PIR) feature.

This chapter includes:

- About Configuring Post Implementation Review on page 233
- Updating HP Service Manager with Ticket Review Data on page 234

About Configuring Post Implementation Review

The Post Implementation Review (PIR) feature allows the Change Reviewer to add review notes to any change request with **Closed** status. The review notes present the conclusions regarding the request, and provide information about its overall success and satisfaction levels of relevant parties.

If you are working with HP Service Manager, you can synchronize PIR information directly to that application, and synchronize information from HP Service Manager to HP Release Control.

- To configure PIR enumeration fields, see “Configuring Enumeration Field Display Settings” on page 279.
- To configure HP Release Control to update HP Service Manager with PIR information, see “Updating HP Service Manager with Ticket Review Data” below.

Updating HP Service Manager with Ticket Review Data

You can configure HP Release Control to update HP Service Manager with ticket review data. HP Release Control uses the **canUpdateReview** and **reviewUpdate** operations to enable this feature.

The **reviewUpdate** operation is responsible for the actual mapping of the review data. It includes the **updateOperations.js** script that maps the HP Release Control fields to the HP Service Manager fields. Specifically, it updates the outcome of the change or task, together with any review comments and the time of the review.

The **canUpdateReview** operation enables the feature in HP Release Control.

To enable updates to HP Service Manager:

- 1** Open the adapter configuration file (by default, **servicemanager-ws-adapter.settings**).
- 2** Ensure that the **reviewUpdate** operation exists under the **<operations>** element:

```
<operation name="reviewUpdate">
  <operation-type>reviewUpdateOperation</operation-type>
  <connector>
    <connector-type>ServiceCenterChangeUpdate</connector-type>
    <properties>
      scriptName=updateOperations.js
      methodName=updateChangeReview
    </properties>
  </connector>
</operation>
```

where **<connector-type>** is defined as:

- **ServiceCenterChangeUpdate** for top-level (parent) change requests
- **ServiceCenterTaskUpdate** for second-level (child) change requests

and where the **updateOperations.js** script calls:

- the **updateChangeReview** method for top-level (parent) change requests
- the **updateTaskReview** method for second-level (child) change requests

- 3 To turn on the Review Update feature, ensure that the **canUpdateReview** operation is defined under the **<operations>** element as follows:

```
<operation name="canUpdateReview">  
  <operation-type>alwaysCanUpdateReviewOperation</operation-type>  
</operation>
```

- 4 Save the adapter configuration file, and restart the HP Release Control service.

20

Configuring Latent and Detected Changes

HP Release Control contains all the changes that are scheduled to take place in your environment.

If you are working with HP Universal CMDB or Mercury Application Mapping 6.5 or later, you can configure HP Universal CMDB to periodically discover actual changes to your environment and send data about these changes to HP Release Control.

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

This chapter includes:

- Understanding Latent and Detected Changes on page 238
- Configuring the Latent Change Feature Properties on page 242

Understanding Latent and Detected Changes

Important: There are different ways that you can work with the latent change feature. This section assumes that the latent change feature is fully activated (**latent-and-detected** mode). For more information about the different work modes, see “Configuring the Latent Change Feature Properties” on page 242.

When a change is discovered, HP Release Control tries to match the discovered change with scheduled changes according to the following criteria:

- 1 Time period.** HP Release Control checks whether the discovered change took place during the same time period as a scheduled change.

Regarding the time period of the scheduled change, HP Release Control first checks the actual time of the scheduled change (this is established by the service desk or the Traffic Control module). If there is no actual time recorded, it checks the planned time.
- 2 CCI/Grouper CI.** If the discovered change took place during the same time period as a scheduled change, HP Release Control checks whether changed CI (CCI) in the discovered change is the same as the scheduled change. If the CCI's are not the same, HP Release Control checks to see if they are linked to a common Grouper CI (for example, the same host).
- 3 Change type.** If the discovered change and a scheduled change share the above criteria (time and Grouper CI), HP Release Control checks whether the discovered change and the scheduled change are of the same change type. The change type can be one that involves adding either hardware or software.

The type of the discovered change is determined by the **change-type** category (**HW_ADD** or **SW_ADD** within the **mam-integration.settings** file) in which the CIT of the discovered change is included. The type of the scheduled change is determined by the information in the scheduled change's **change-types-orig** field, which can contain the value of either **HW_ADD** or **SW_ADD**.

Note:

- To enable HP Release Control to use the change type criterion, you need to have a field in your service desk application in which you identify the change request's change type. You then need to map this field to the possible values—**HW_ADD** or **SW_ADD**—in the **change-types-orig** field. For more information about converting and mapping service desk application fields, see Chapter 5, “Configuring the Conversion of Requests.”
 - To enable HP Release Control to check whether changed CIs (CCIs) in the discovered change and in the scheduled change are linked to a common CIT, you must ensure that at least one of the following attributes is selected for each CIT within HP Universal CMDB: **Change Monitored**, **Comparable**, **Asset Data**.
-

Handling the Discovered Change

HP Release Control handles the discovered change in one of the following ways, depending on the extent to which the above matching criteria were met:

- **HP Release Control displays the change as a detected change.**

When a discovered change matches a scheduled change according to all of the above criteria (time, CCI/grouper CI, and change type), it is defined by HP Release Control as a **detected change**. Detected changes are displayed with the corresponding change request in the Analysis module's Detected Changes tab.

► **HP Release Control displays the change as a latent change.**

When a discovered change does not match any scheduled change, or if it only matches the scheduled change according to some of the above criteria, it is defined by HP Release Control as a **latent change**.

Note: The exception to this rule is when the change type is unknown. For more information, see “HP Release Control disregards the change.”

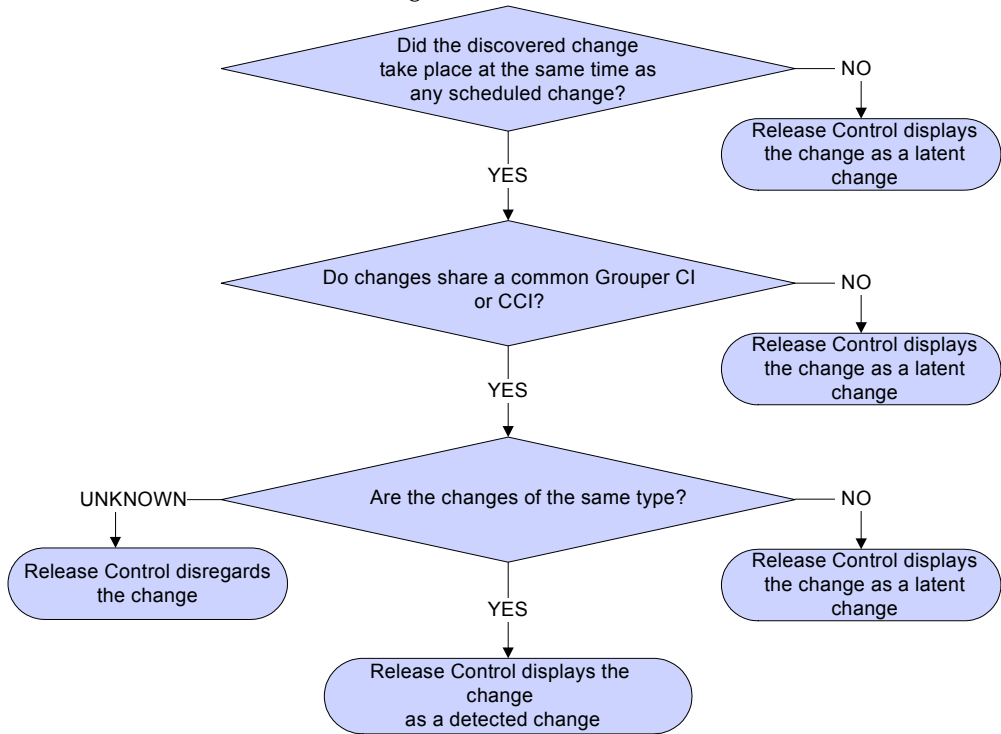
For example, if the discovered change took place during the same period as the scheduled change but they do not share a common Grouper CI, the discovered change is defined as latent.

Latent changes are displayed as separate changes in the Analysis module’s Change Requests pane.

► **HP Release Control disregards the change.**

If the discovered change matches the scheduled change according to the first two criteria (time and CCI/Grouper CI), but the scheduled change does not include information regarding its **change type** (meaning that the change type is unknown), HP Release Control will disregard the discovered change and the change will not be displayed.

The following flow chart summarizes the way in which HP Release Control handles a discovered change:



Example

Assume, for example, that **NewChange** is the name of a discovered change that was detected by HP Universal CMDB and **CCMrequest1**, **CCMrequest2**, and **CCMrequest3** are all the scheduled changes included in HP Release Control.

HP Release Control tries to match the discovered change, **NewChange**, with existing scheduled changes (**CCMrequest1**, **CCMrequest2**, and **CCMrequest3**) according to the criteria described above.

If **NewChange** and **CCMrequest2** took place over the same time period, HP Release Control checks whether **NewChange** and **CCMrequest2** have identical CIs. If they do not have identical CI's, HP Release Control checks to see if they link to a common Grouper CI. If they do, HP Release Control checks the change type.

- If **NewChange** and **CCMrequest2** have the same change type (both involve adding hardware), **NewChange** is defined as a **detected change**.
- If **NewChange** and **CCMrequest2** have different change types (one involves adding hardware and one involves adding software), **NewChange** is defined as a **latent change**.
- If HP Release Control cannot identify the change type of **CCMrequest2**, then **NewChange** is disregarded and is not displayed anywhere.

Configuring the Latent Change Feature Properties

You configure the latent change feature in the `<latent-changes>` section of the **HP Release Control installation directory**\conf\mam-integration.settings file.

The following is an example of the code displaying the configurable elements:

```
<latent-changes-mode>disabled</latent-changes-mode>
  <!-- get detected changes every night at 4 AM -->
<detect-changes-schedule>0 0 4 * * ?</detect-changes-schedule>
<detect-changes-duration-in-hours>24</detect-changes-duration-in-hours>
<detect-changes-recovery-duration-in-hours>720
</detect-changes-recovery-duration-in-hours>
<latent-change-level>1</latent-change-level>
<latent-change-ref-id>
  <initial-counter-value>1</initial-counter-value>
  <format>L-{0,number,#0000000000.###}</format>
```

- **<latent-changes-mode>**. You choose how to work with the latent change feature by defining a value for this element. You can define one of the following values:

Value	Description
disabled	The latent change feature is inactivated. HP Release Control does not receive information about new changes in your environment. This is the default setting.

Value	Description
latent-and-detected	The latent change feature is fully activated. Latent and detected changes are displayed according to the criteria described in “Understanding Latent and Detected Changes” on page 238.
latent-consider-change-types	The latent change feature is partially activated. Detected changes are ignored and latent changes are displayed. Latent changes detected in your environment are displayed according to the criteria described in “Understanding Latent and Detected Changes” on page 238.
latent-ignore-change-types	<p>The latent change feature is partially activated. Detected changes are ignored and latent changes are displayed. In this mode, the change type criteria is not taken into account when identifying latent changes.</p> <p>The difference between latent-ignore-change-types mode and latent-consider-change-types mode can be illustrated in the following example:</p> <p>If a discovered change matches one of the scheduled changes according to the first two criteria (time and CCI/Grouper CI) but the change types are different, then:</p> <ul style="list-style-type: none"> ➤ in latent-ignore-change-types mode, the change would not be defined as latent. ➤ in latent-consider-change-types mode, the change would be defined as latent.

- **<detect-changes-schedule>**. Define the schedule for HP Release Control's request of information from HP Universal CMDB about newly discovered changes. This value is entered as a cron expression.
- **<detect-changes-duration-in-hours>**. Define the block of time for which HP Release Control requests information from HP Universal CMDB about newly discovered changes.

- **<detect-changes-recovery-duration-in-hours>**. When the HP Release Control server starts up, it searches for cases in which there were problems encountered during the calculation of detected changes (for example, if the server stopped during the calculation process). In this element, you define how far back in time HP Release Control should search for such problem cases. The default setting is one month.
- **<latent-change-level>**. Latent changes are displayed as separate changes in the Analysis module. Define whether you want latent changes to be displayed as top-level (parent) change requests or second-level (child) requests.
- **<latent-change-ref-id>**. Latent changes are displayed as separate changes in the Analysis module. Define a format for the request ID assigned to the latent changes by defining a value for the following sub-elements:
 - **<initial-counter-value>**. The number that will be included in the Request ID for the first latent change recorded in your system.
 - **<format>**. The format of the latent change request ID.
- **<detected-changes-query>**. HP Release Control uses the **ccmDetectedChangesRule** TQL query to describe the types of CIs which should be checked for changes. Each CI type must be linked to its Grouper CI as well.

Note: All nodes in the TQL must be set to visible (property visible = true).

For more information about TQL queries, refer to the HP Universal CMBDB documentation.

Note: If you are using version 6.6 of the Universal CMDB, the following tag may also be configured:

<host-grouping-query>. Define values for the following sub-elements:

- **<name>.** The name of the TQL query in HP Universal CMDB that describes the relationship between the searched CIs and their grouper CIs. For more information about TQL queries, refer to the HP Universal CMDB documentation.
 - **<cis-list-object-name>.** The label of the CI in the TQL that represents the CCI.
-

Part VI

User Management

21

Configuring User Settings

This chapter describes how to configure user settings.

This chapter includes:

- Configuring Users on page 249
- Configuring User Name and Password Constraints on page 254
- Configuring User Login Settings on page 255

Configuring Users

You configure user settings for new HP Release Control users, edit the settings of existing users, and delete users in the Administrator module's Users tab.

This section includes:

- "Configuring User Settings" below
- "Modifying User Settings" on page 253
- "Deleting Users" on page 254

Configuring User Settings

You define a new user by configuring settings—including basic user details and associated business CIs—for the user.

Note: If you are working in identity management mode, you cannot add users in the Administrator module. For details on working in identity management mode, see “Using Identity Management” on page 258.

To configure user settings:



- 1** In the Administrator module’s **Users** tab, click the **New** button in the top left corner. The User Settings dialog box opens.

- 2** Enter the following user settings:

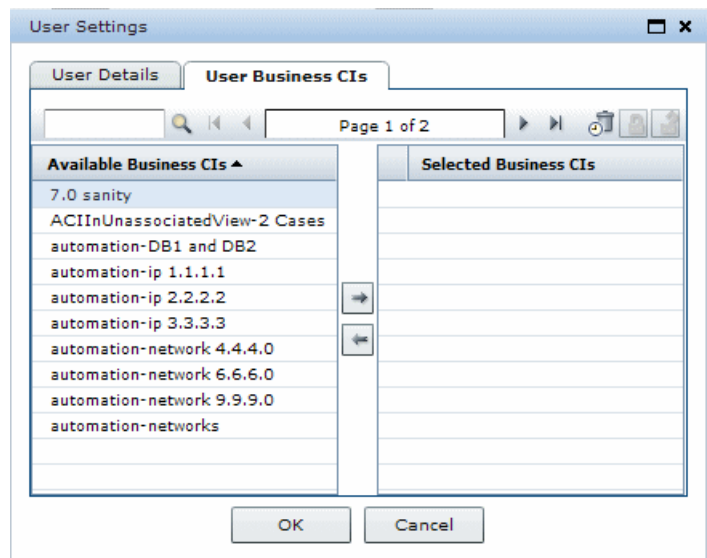
Column	Description
User login name	The user name by which the user will be able to log in to HP Release Control.
User ID	The user’s login ID, where applicable.

Column	Description
First name	The first name of the user you are defining.
Last name	The last name of the user you are defining.
Email address	The email address of the user you are defining. This is the email address to which notifications will be sent for this user.
Password	The password by which the user will be able to log in to HP Release Control.
Retype password	Confirms the password entered in the previous box.

3 From the **User role** box, select one of the following options:

Role	Permissions
Administrator	Can perform all functions
Change Approver	Can approve change requests or retract an approved change request
Change Manager	Can create and send CAB minutes and invitations
Change Reviewer	Can create and edit Post Implementation Reviews (PIR), and send PIR minutes and invitations
Guest	None
NOC	Can perform any action in the Director module, such as changing the state of a change request, dismissing alerts, and rescheduling change requests
Similarity Teacher	Can use the Similar Changes feature to teach similarity
User	Can perform all functions other than those specified in other roles

- 4 To associate business CIs with the user you are defining, click the **User Business CIs** tab.



- 5 In the **Available Business CIs** list, select the business CIs you want to associate with the user. If the list of available business CIs is lengthy, you can use the search box to display only those business CIs that match the text you enter in the search box. In addition, you can use the **First**, **Previous**, **Next**, and **Last** buttons to locate a business CI. You can select multiple business CIs using the CTRL key.



- 6 Click the right arrow to move the business CIs to the **Selected Business CIs** list.



- 7 To ensure that the user will not be able to remove the association with a specific business CI, select the business CI and click the **Enforce Business CI** button.



To restore the user's ability to remove the association with this business CI, select the business CI and click the **Stop Enforcing Business CI** button.

- 8 Click **OK** to save your settings and close the User Settings dialog box. The new user is added to the HP Release Control database and is listed in the Users tab.

Modifying User Settings

As an administrator, you can modify the settings of an existing HP Release Control user.

To modify user settings:

- 1 In the Administrator module's **Users** tab, select the user whose settings you want to modify. If the list of users is lengthy, you can use the search box and/or the **First**, **Previous**, **Next**, and **Last** buttons to locate a user.



- 2 Click the **Edit** button in the top left corner. The User Settings – <Name of User> dialog box opens.

The image shows a 'User Settings' dialog box with two tabs: 'User Details' and 'User Business CIs'. The 'User Details' tab is active. It contains the following fields:

- User login name: *
- User ID: *
- First name: *
- Last name: *
- E-Mail address: *
- Password: *
- Retype password: *
- User role: *

At the bottom are 'OK' and 'Cancel' buttons.

- 3 Modify the user details and the business CIs associated with the user as required. For a description of user settings, see “Configuring User Settings” on page 250.

Note: If you are working in identity management mode, you cannot modify the user's login name, password, first name, last name, or email address. For details on working in identity management mode, see “Using Identity Management” on page 258.

- 4 Click **OK** to save your changes and close the User Settings – <Name of User> dialog box.

Deleting Users

You can delete any previously defined HP Release Control users.

To delete users:



- 1 In the Administrator module's **Users** tab, select the users you want to delete and click the **Delete** button in the top left corner.
- 2 Click **Yes** to confirm deletion. HP Release Control deletes the users from the database.

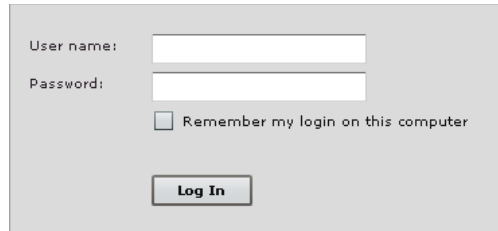
Configuring User Name and Password Constraints

You can configure the following HP Release Control business CI user name and password constraints and properties in the <HP Release Control installation directory>\conf\analysis-app-module.settings file:

- **minimum length.** Specify the minimum number of characters the user name/password can contain. By default, a user name/password must contain at least one character.
- **maximum length.** Specify the maximum number of characters the user name/password can contain. By default, a user name/password can contain no more than 50 characters.
- **pattern.** Using regular expressions, specify the characters that each user name/password can contain. For example, use the following expression to indicate that a user name/password can be any upper-case or lower-case letter, as well as any digit: `^[A-Z,a-z,0-9]$`
- **pattern error message.** Specify the type of error message to be displayed if the user name/password contains a character that is not allowed. You can enter the error text itself here, or **properties-file** if you want to reference a properties file for the error message. If you reference a properties file, the error message text itself should be written in the `onyxCommonResources.properties` file.

Configuring User Login Settings

When users log in to HP Release Control from the opening page, they can select **Remember my login on this computer** so that the next time they log in from the same computer, they do not need to enter a user name and password.



User name:

Password:

☐ Remember my login on this computer

You can disable the **Remember my login on this computer** option in the `<HP Release Control installation directory>\conf\security.settings` file by setting the value of the `<remember-me-enabled>` element to **false** and then restarting the HP Release Control server.

```
<settings>
  <session-settings version="3.0">
    <remember-me-enabled>false</remember-me-enabled>
  </session-settings>
</settings>
```

The **Remember my login on this computer** option no longer appears on the opening screen.

To restore the **Remember my login on this computer** option, set the value of the `<remember-me-enabled>` element to **true** and restart the HP Release Control server.

22

User Authentication

This chapter describes the possible methods of user authentication in HP Release Control.

This chapter includes:

- About HP Release Control User Authentication on page 257
- Using Identity Management on page 258
- Using LDAP Authentication on page 264
- Using the Regular Authentication Mode on page 267

About HP Release Control User Authentication

You can configure HP Release Control to work in one of the following user authentication modes:

- **Identity management mode.** HP Release Control works with an identity management system that authenticates all users using Lightweight Directory Access Protocol (LDAP).
- **LDAP mode.** HP Release Control works directly with the Lightweight Directory Access Protocol (LDAP) server for user authentication. User information is stored in the LDAP information directory and an LDAP server is used to process queries and updates to this directory.
- **Regular mode.** HP Release Control does not work with an identity management system or LDAP, and HP Release Control authenticates all users.

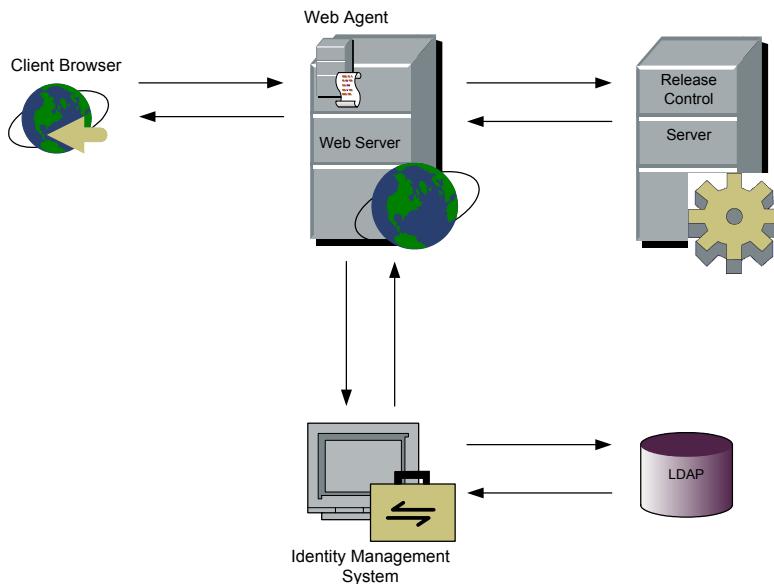
Using Identity Management

Identity management systems enable organizations to maintain user account information in order to control login access to applications. If an identity management system is in place and a user attempts to access an application, the identity management system first authenticates the user by requesting credentials, such as a user name and password. If the user is authenticated, the identity management system authorizes the appropriate amount of access to the application based on the user's identity and permissions. In this manner, critical data is protected with appropriate authorizations, while end-user identity information is properly stored.

HP Release Control supports a variety of identity management systems. The configuration samples in this document use the CA SiteMinder 6.0 identity management system.

HP Release Control's Identity Management Mode Architecture

The following diagram illustrates HP Release Control's identity management mode architecture.



To work with identity management in conjunction with HP Release Control, you must instruct HP Release Control to use a Web server. During the HP Release Control installation process, you can instruct HP Release Control to use either an Apache or a Microsoft IIS Web server. For details, see “Installation Procedures” on page 33.

The identity management Web agent is installed on the Web server and used as the single access point for all Web clients. The Web agent intercepts all incoming requests and ensures that they are authenticated. Only authenticated requests are then transferred to HP Release Control.

Configuring HP Release Control to Work in Identity Management Mode

To work with HP Release Control in conjunction with an Identity Management System such as CA SiteMinder, you must configure both HP Release Control and the Identity Management System. This section uses CA SiteMinder as an example, but the same concepts can apply to a variety of Identity Management Systems.

The HP Release Control identity management mode configuration process includes the following:

- ❑ Configuring HP Release Control to Work with an Identity Manager
- ❑ Configuring an Identity Manager to Work with HP Release Control
- ❑ Adding Your Organization’s Administrator to HP Release Control

Configuring HP Release Control to Work with an Identity Manager

To work with HP Release Control in conjunction with CA SiteMinder, the HP Release Control administrator must perform the following procedure.

To configure HP Release Control to work with CA SiteMinder:

- 1** Copy the files located in the <HP Release Control installation directory>\examples\identity-management-examples\Site-Minder\CCM\ directory to the HP Release Control installation directory.

- 2 If your organization has a logout page, ask the CA SiteMinder administrator to provide you with an HP Release Control logout URL. In the **<HP Release Control installation directory>\conf\security.settings** file, set the **logout-url** field to the value provided.
- 3 Restart the HP Release Control service.

Configuring an Identity Manager to Work with HP Release Control

To work with CA SiteMinder in conjunction with HP Release Control, the CA SiteMinder administrator must:

- install and configure the Web agent
- configure personalization
- configure the logout page

Installing and Configuring the Web Agent

Install the Web agent on the HP Release Control server machine and configure the agent to protect the HP Release Control resource. Only users who are authorized to work with HP Release Control should be allowed access to the HP Release Control resource.

For details on installing the Web agent and configuring the agent to protect resources, refer to the *eTrust SiteMinder Web Agent Installation Guide*, available from CA.

Configuring Personalization

Configure CA SiteMinder to add the following headers to the HTTP header request that is returned following a successful authentication:

- **uid.** Containing the user's login name.
- **firstName.** Containing the user's first name.
- **lastName.** Containing the user's last name.
- **eMail.** Containing the user's email address.

Configuring the Logout Page

If your organization does not have a logout page, CA SiteMinder should be configured to use the HP Release Control logout page, **ccmLogout.html**, located under **/ccm/imresources** in the Resource Access tree.

Adding Your Organization's Administrator to HP Release Control

By default, HP Release Control includes one user, **ccmadmin**, with administrative privileges. This user, however, does not exist in the LDAP information directory. Your organization's real HP Release Control administrator, whose properties are stored in the LDAP directory, does not initially exist in HP Release Control and must be added using the following bootstrap procedure.

To add your organization's administrator to HP Release Control:

- 1** Set the HP Release Control authentication mode to **IMMode** (in the **<HP Release Control installation directory>\conf\security.settings** file) and restart the HP Release Control service.
- 2** Log in to HP Release Control (<http://<server name>/ccm>) using the identity management credentials of your organization's administrator. Your organization's administrator is added to HP Release Control as a regular user (**User** role).
- 3** Set the HP Release Control authentication mode to **DBMode** (in the **<HP Release Control installation directory>\conf\security.settings** file) and restart the HP Release Control service.
- 4** Log in to HP Release Control (<http://<server name>:<Tomcat server port>/ccm>) using **ccmadmin** as the user name and password.
- 5** Assign your organization's administrator the role of **Administrator** (in the Administration module's Users tab – see the “Configuring Users” on page 249 for details).
- 6** Optionally, change the **ccmadmin** user's password.
- 7** Return the HP Release Control authentication mode to **IMMode** and restart the HP Release Control service.

Note:

- You can close the Tomcat server port (by default, 8080) once you have performed the above procedure. For details, contact HP Professional Services.
 - It is recommended that you do not remove the **ccmadmin** user from HP Release Control. If you did remove the **ccmadmin** user, you can restore this user by changing the command line directory to **<HP Release Control installation directory>\utilities\AddAdminUser** and running the following: **addAdminUser.bat**
-

Working in Identity Management Mode

When you work in identity management mode, your identity management system authenticates all users. If a user has been successfully authenticated, the identity management system returns the user name, first name, last name, and email address user properties in the HTTP header request. HP Release Control checks whether this user already exists in HP Release Control. If so, the user's first name, last name, and email address are updated, if necessary. If not, the user is added to HP Release Control as a regular user (**User** role), with the properties returned from the identity management system.

Note:

- The created user is unable to log in to HP Release Control using the regular authentication mode until the HP Release Control administrator provides the user with an HP Release Control password. For details, see “Using the Regular Authentication Mode” on page 267.
 - If you want to perform an operation that is user-centric (such as assigning an action item to a user) before the user exists in HP Release Control, you can add the user to HP Release Control using the user importer utility. For details on this utility, see “User Importer” on page 312.
-

When working in identity management mode, the following user and HP Release Control administrator restrictions exist:

- Users are unable to modify their user names, passwords, first names, last names, or email addresses.
- The HP Release Control administrator is unable to add users to HP Release Control using the Administration module.
- The HP Release Control administrator is unable to update the user name, password, first name, last name, or email address of any user within HP Release Control.

All of the above functions must be performed in the LDAP directory.

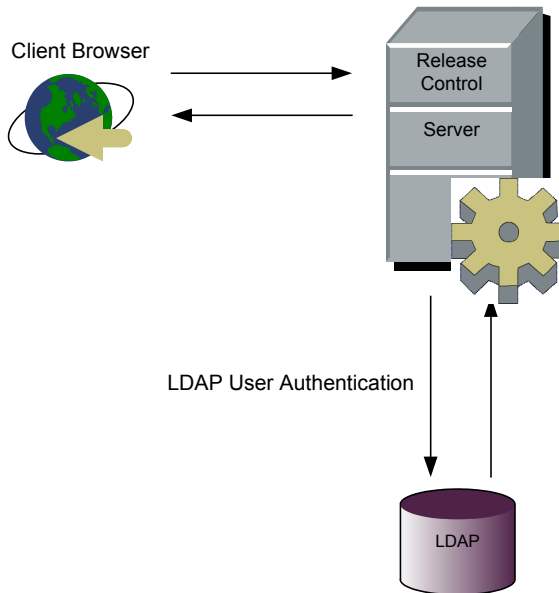
It is possible, however, to add users to HP Release Control using the user importer utility. For details on this utility, see “User Importer” on page 312.

Using LDAP Authentication

You can configure HP Release Control to use LDAP for user authentication. HP Release Control will automatically take the user login information from the LDAP server. Since HP Release Control and LDAP are synchronized, any user information that changes in LDAP will be reflected in HP Release Control the next time a user logs in. When you configure LDAP authentication, you map the LDAP user groups to HP Release Control user roles.

HP Release Control's LDAP Authentication Architecture

The following diagram illustrates HP Release Control's LDAP Authentication mode architecture.



Configuring the LDAP Connection Properties

To work with LDAP authentication in HP Release Control, you must set the LDAP parameters in the **security.settings** and **ldap.properties** files.

security.settings

After you set up the LDAP server, copy the <HP Release Control installation directory>\examples\ldap-examples\security.settings file to the <HP Release Control installation directory>\conf\ directory, and configure the following settings:

- **authentication_mode.** Set the authentication mode to **LDAPMode**
- **User Login Information.** Specify the user login information required to connect to the LDAP server: **FirstName, LastName, Email.**

For example:

```
<authentication-mode>LDAPMode</authentication-mode>
<firstName-header>first_name</firstName-header>
<lastName-header>last_name</lastName-header>
<eMail-header>mail</eMail-header>
```

Map the LDAP user groups to roles in HP Release Control as follows:

- **Group.** In each Group section, specify the **group-name** of the LDAP user group and the corresponding HP Release Control **roles**. The roles can be a single role, or a list of roles separated by a comma.
- **synchronize-roles.** Indicate whether to synchronize the group mapping if a definition changes.
 - Use **true** to specify that if a user changes to a different LDAP group, they will automatically be mapped to new corresponding HP Release Control roles.
 - Use **false** to specify that users should keep their original roles, even if they change groups. In this case a user can only change roles using the HP Release Control client.

- **default_roles.** Specify which roles to map to a user if they do not belong to any of the groups defined in the **groups** section. The LDAP authentication will allow all users with a role to access to HP Release Control. Use this setting with caution, because if you set **default_roles**, then all users will be granted access to HP Release Control.

In the following example, there are two LDAP groups. **Admin** is mapped to the HP Release Control **CCM_ROLE_ADMIN** role. **General** is mapped to the HP Release Control **CCM_ROLE_USER** role. **synchronize-roles** is **true**, so if a user changes roles, they will automatically be mapped to the new corresponding LDAP group.

```
<!-- Configure the mapping of groups from LDAP to roles in CCM -->
<ldap-settings>
  <synchronize-roles>true</synchronize-roles>
  <default-roles></default-roles>
  <groups>
    <group>
      <group-name>Admin</group-name>
      <roles>CCM_ROLE_ADMIN</roles>
    </group>
    <group>
      <group-name>General</group-name>
      <roles>CCM_ROLE_USER</roles>
    </group>
  </groups>
</ldap-settings>
```

ldap.properties

The HP Release Control installation provides two sample **ldap.properties** files. Both of these files contained detailed instructions for setting the connection between HP Release Control and the LDAP server.

If you are working with LDAP Active Directory, then copy the **<HP Release Control installation directory>\examples\ldap-examples\ldap.properties.AD** file to **<HP Release Control installation directory>\conf\ldap.properties** and set the necessary LDAP server information.

If you are working with LDAP SUN One, then copy the **<HP Release Control installation directory>\examples\ldap-examples\ldap.properties.SO** file to **<HP Release Control installation directory>\conf\ldap.properties** and set the necessary LDAP server information.

Note: If the LDAP server is configured to work over SSL, make sure to set **enableSSL = true** in the **ldap.properties** file.

Using the Regular Authentication Mode

As an alternative to using the HP Release Control's identity management or LDAP user authentication solutions, you can use HP Release Control's regular authentication mode.

To revert to the regular authentication mode:

- 1** If you previously closed the Tomcat server port (by default, 8080), reopen it.
- 2** Set the HP Release Control authentication mode to **DBMode** (in the **<HP Release Control installation directory>\conf\security.settings** file) and restart the HP Release Control service.
- 3** Log in to HP Release Control (<http://<server name>:<Tomcat server port>/ccm>) using **ccmadmin** as the user name and password.
- 4** Add users as required, providing these users with an initial password. You can also configure passwords for the users added while working in identity management mode. These users will be able to log in to HP Release Control using HP Release Control's regular authentication mode.

Once the identity management solution has been restored, you can resume working in identity management mode by setting the HP Release Control authentication mode to **IMMode** in the **<HP Release Control installation directory>\conf\security.settings** file and accessing HP Release Control via the following URL: <http://<server name>/ccm>. You can then disable the DB authentication mode by closing the Tomcat server port.

Part VII

System Preferences

23

Configuring System Preferences

This chapter describes how to configure system preferences.

This chapter includes:

- Configuring the Format of Emails on page 271
- Configuring Log File Properties on page 274
- Configuring Calendar Settings on page 276
- Configuring Dashboard Settings on page 278
- Configuring Enumeration Field Display Settings on page 279
- Configuring Localization Settings on page 281
- Configuring Alert Settings on page 281

Configuring the Format of Emails

You configure the format of the emails that HP Release Control sends in the **ftl** files, located in the **<HP Release Control installation directory>\conf\notifications.ext** directory.

- **mailSubject.ftl.** Defines the subject line of an email. By default, HP Release Control displays **<request-id> – <request summary>** (for example, **C-10020 – Upgrade database server**) as the subject line of the notification.
- **mailbody-text.ftl.** Defines the content of a notification sent in text format.
- **mailbody-html.ftl.** Defines the content of a notification sent in HTML format.
- **user-mailbody-text.ftl.** Defines the content of the email that a user sends by clicking the **Send Email** button in the Change Requests pane.

- **user-mailbody-html.ftl.** Defines the content of the email (in HTML format) that a user sends by clicking the **Send Email** button in the Change Requests pane.
- **free-text-only-text.ftl.** Defines the content of the email that a user sends by clicking the **Send Email** button in the Collaboration tab's Discussion view.
- **free-text-only-html.ftl.** Defines the content of the email (in HTML format) that a user sends by clicking the **Send Email** button in the Collaboration tab's Discussion view.
- **user-action-item-text.ftl.** Defines the content of the email that a user sends by clicking the **Forward by Email (FYI)** button in the Action Items pane.
- **user-action-item-html.ftl.** Defines the content of the email (in HTML format) that a user sends by clicking the **Forward by Email (FYI)** button in the Action Items pane.
- **subscribe-ai-modified-textbody.ftl.** Defines the content of the email sent to a user who subscribed to receive notification of updates to an action item.
- **subscribe-ai-modified-htmlbody.ftl.** Defines the content of the email (in HTML format) sent to a user who subscribed to receive notification of updates to an action item.
- **subscribe-ai-modified-subject.ftl.** Defines the subject line of the email sent to a user who subscribed to receive notification of updates to an action item.
- **subscribe-cr-modified-htmlbody.ftl.** Defines the content of the email (in HTML format) sent to a user who subscribed to receive notification of updates to a change request.
- **subscribe-cr-modified-subject.ftl.** Defines the subject line of the email sent to a user who subscribed to receive notification of updates to a change request.
- **subscribe-cr-modified-textbody.ftl.** Defines the content of the email sent to a user who subscribed to receive notification of updates to a change request.

By default, the above files make use of the following HP Release Control objects:

Object	Description
notificationRuleSummary	References the message included in the change-flow.js script's getUsersToNotify function explaining why the user is receiving a notification.
freeTextBody	The text entered by the user when sending an email from the Change Requests pane of the HP Release Control application.
ScriptingActionItem	The action item object for which the notification is being sent. Using this object, you can reference all of the action item properties. For details of the methods that can be used for this object, refer to the ScriptingActionItem class in the API_Reference.chm file, located in the <HP Release Control installation directory>\documentation folder.
request	The request object for which the notification is being sent. Using this object, you can reference all of the request fields. For details of the methods that can be used for this object, refer to the GenericRFC class in the API_Reference.chm file, located in the <HP Release Control installation directory>\documentation folder.
affectedCIs	Returns a list of the CIs that are impacted by a change request.
viewCis	Returns information about CIs in the context of an impact analysis of a specific change request. For details of the methods that can be used for this object, refer to the CI class in the API_Reference.chm file, located in the <HP Release Control installation directory>\documentation folder.

Object	Description
affectedViews	Returns a list of the business CIs that are impacted by a change request.
viewInfo	Returns information about business CIs that are associated with the affected users, in the context of an impact analysis of a specific change request. For details of the methods that can be used for this object, refer to the ViewInfo class in the API_Reference.chm file, located in the <HP Release Control installation directory>\documentation folder.

Notes:

- The FTL files are written using FreeMarker syntax. For details on using FreeMarker, refer to <http://freemarker.sourceforge.net/docs/index.html>.
 - For a detailed explanation of the objects that can be used in the FTL files, refer to the **API_Reference.chm** file, located in the <HP Release Control installation directory>\documentation folder.
 - The HP Release Control fields that can be used in the FTL files are those that are defined in the Fields tab of the Administration module. For more information, see “Configuring Change Request Field Settings” on page 57.
-

Configuring Log File Properties

The <HP Release Control installation directory>\conf\ccmlog4j.properties file contains a list of log file definitions, some of which you may want to modify.

The Tomcat server log files are located in the <HP Release Control installation directory>\tomcat\logs\stdout-date.log file.

The HP Release Control log files are located in the **<HP Release Control installation directory>\logs** directory. For a description of each of the log files contained in this directory, see Appendix D, “Log Files.”

Modifying the HP Release Control Console Display

By default, when the Tomcat server is running, HP Release Control will not display error messages on the console. All messages will be directed to the **<HP Release Control installation directory>\logs\ccm_general.log** file. This controls the size of the Tomcat server **stdout.log** file.

To change this setting, modify the following line at the top of the **ccmlog4j.properties** file:

```
log4j.rootCategory=WARN, ccm_general_fileout, stdout
```

Modifying the Types of Messages Displayed

The following three types of log message commands can be used:

- **WARN.** Warning and error messages are displayed.
- **INFO.** Info messages that record the processing activity that the system performs are displayed, in addition to warning and error messages.
- **DEBUG.** All types of log messages are displayed.

Modifying File Size and Backup Policy

By default, the maximum size of a log file is set to 4000 KB. To change this setting for all log files, modify the following line at the top of the **ccmlog4j.properties** file:

```
def.file.max.size=4000KB
```

By default, there are 10 backup log files at any given time. To change this setting for all log files, modify the following line at the top of the **ccmlog4j.properties** file:

```
def.files.backup.count=10
```

Modifying Time Zones

By default, log messages are recorded using the GMT time zone. To use a different time zone, specify the required zone in the following line at the bottom of the **ccmlog4j.properties** file:

```
ConversionPattern=%d{ISO8601} [%t] %-5.5p %C{1} - %m%n
```

For example, if you want to use Eastern Standard Time, you would specify the following:

```
ConversionPattern=%d{ISO8601@EST} [%t] %-5.5p %C{1} - %m%n
```

For a list of GMT time zones for locations throughout the world, see Appendix B, “GMT Time Zones.”

Configuring Calendar Settings

By default, the Calendar view in the Analysis module displays Monday as the first day of the week and the color of the impact severity level as the color of the change request heading. However, you can modify these settings in the **<calendar-settings>** section of the **<HP Release Control installation directory>\conf\analysis-app-module.settings** file.

For example, if you would like to display Sunday as the first day of the week, you would change the value of the **<start-day-of-week>** element from **2** to **1**:

```
<start-day-of-week>1</start-day-of-week>
```

You can also associate the header color with a field other than the impact-severity field. For example, you could associate the header color with the **contact-person** field (using the name of the field that you defined in the Fields tab) and map different contact people to different colors, as follows:

```
<header-line-color>
  <data-field-name>contact-person</data-field-name>
  <data-type>enumeration</data-type>
  <values>
    <map-value source="Steve" target="yellow"/>
    <map-value source="David" target="0x00ff00"/>
  </values>
  <unknown-value>0xffffffff</unknown-value>
</header-line-color>
```

Note: The **<unknown-value>** element defines the color to be displayed when the value of the field does not match any of the mapped values.

Alternatively, you can modify the default colors displayed in the header for each impact severity level. For example, you could associate the impact severity level of **High** with the color purple and the impact severity level of **Medium** with the color blue, as the following lines demonstrate:

```
<header-line-color>
  <data-field-name>impact-severity</data-field-name>
  <data-type>enumeration</data-type>
  <values>
    <map-value source="High" target="purple"/>
    <map-value source="Medium" target="blue"/>
  </values>
  <unknown-value>0xffffffff</unknown-value>
</header-line-color>
```

Note: The colors you define for the calendar header will also be used in the Timeline views.

Configuring Dashboard Settings

The **<HP Release Control installation directory>\conf\dashboard.settings** file maps the two types of roles in HP Release Control—**user** and **administrator**—to the **users** and **administrators** Dashboard groups, respectively, and defines the privileges granted to each group. This file also contains other definitions related to the display of Dashboard pages and portlets.

Note: The definitions in this file should not be modified.

The **<HP Release Control installation directory>\conf\Dashboard_Objects_Export.xml** file contains definitions for the HP Release Control Default Page in the Dashboard. If you changed the **Pending Approval** or **Closed** status in the **<HP Release Control installation directory>\conf\enumerations.settings** file, you must update the **Dashboard_Objects_Export.xml** file with the alternative status or statuses that you are using.

To update the Closed status:

- 1 Locate the following line within the **Dashboard_Objects_Export.xml** file:

```
[CLOSED][Closed]
```

Note that there are two occurrences of this line in the file.

- 2 Replace **[CLOSED]** with the alternative status defined in the **<HP Release Control installation directory>\conf\enumerations.settings** file. For details on configuring the **enumerations.settings** file, see “Customizing HP Release Control Fields” on page 74.
- 3 Replace **[Closed]** with the label you assigned to the above status in the **<HP Release Control installation directory>\conf\enumeration-labels.properties** file. For details on configuring the **enumeration-labels.properties** file, see “Configuring Enumeration Field Display Settings” on page 279.

To update the Pending Approval status:

- 1 Locate the following line within the **Dashboard_Objects_Export.xml** file:

```
[PENDING_APPROVAL][Pending_Approval]
```

Note that there are two occurrences of this line in the file.

- 2 Replace **[PENDING_APPROVAL]** with the alternative status defined in the **<HP Release Control installation directory>\conf\enumerations.settings** file. For details on configuring the **enumerations.settings** file, see “Customizing HP Release Control Fields” on page 74.
- 3 Replace **[Pending_Approval]** with the label you assigned to the above status in the **<HP Release Control installation directory>\conf\enumeration-labels.properties** file. For details on configuring the **enumeration-labels.properties** file, see “Configuring Enumeration Field Display Settings” below.

After you have updated the **Dashboard_Objects_Export.xml** file with the alternative status or statuses that you are using, you must run the **populate_dashboard.bat** command from the **<HP Release Control installation directory>\tomcat\webapps\ccm** command line directory. Note that when you run this command, any previous Dashboard data that you configured is automatically deleted.

Configuring Enumeration Field Display Settings

The **<HP Release Control installation directory>\conf\enumeration-labels.properties** file contains a default application display mapping scheme for the configured enumeration fields. You can modify the way in which the HP Release Control application displays each of the enumeration fields listed in this file.

For example, you may want to display the status **Closed** as **Completed**. To do so, you would change the line:

```
StatusEnum.CLOSED=Closed
```

to:

```
StatusEnum.CLOSED=Completed
```

You can also modify the icon color that corresponds to each severity level. For example, to display a red icon rather than an orange icon for a severity level of **High**, you would change the line:

```
SeverityEnum.High.color=orange
```

to:

```
SeverityEnum.High.color=red
```

Note: You cannot modify the color icons themselves; red, orange, yellow, green_yellow, green, and gray are the only colors available.

By default, top-level or parent change requests are referred to as **changes** and second-level or child change requests are referred to as **tasks** in the HP Release Control application. Other request hierarchy levels are referred to as **unknown**. You can modify this terminology by changing the following lines in the **enumeration-labels.properties** file:

```
LevelEnum.1=Change  
LevelEnum.2=Task  
LevelEnum.Level.UNKNOWN=Unknown
```


Configuring Localization Settings

By default, the HP Release Control location setting is set to the United States and English is the default language setting. You can modify these settings in the `<name>country</name>` and `<name>language</name>` sections of the `<HP Release Control installation directory>\conf\appinfra.settings` file.

```
<property>
  <name>country</name>
  <value>US</value>
</property>
<property>
  <name>language</name>
  <value>en</value>
</property>
```

For example, if you would like to change the country and language settings to Japan and Japanese respectively, you would change the **US** and **en** values to **JP** and **ja**.

Configuring Alert Settings

This section describes the configuration of the `alerts-config.settings` file where you can configure the following settings for alerts:

- “Alert Engine Run Interval” on page 282
- “First Run of Alert Engine” on page 284
- “Change-Modify Time Window for Emergency/Modified Activity Alerts” on page 284
- “Alert Behavior” on page 287

Important: You must restart the HP Release Control service for these configuration changes to take effect.

Alert Engine Run Interval

HP Release Control refreshes alerts in the Director module using the alert engine defined in the **<HP Release Control installation directory>\conf\alerts-config.settings** file. By default, the alert engine is enabled and runs every minute.

To change the rate at which the engine runs:

- 1** In the **alerts-config.settings** file, locate the **<cron-expression>** element.

```
<alerts-config version="4.0-local-build">
  <default-config>
    .
    <!-- use this option to enable the alert engine every minute-->
    <cron-expression>0 0/1 * * * ?</cron-expression>
```

By default, the alert engine is configured to run after an interval of 1 minute. This is indicated by the **minutes** field of the cron expression, **0/1**, where 1 is the interval (in minutes) after which the engine runs. (For more information about cron expressions, see <http://quartz.sourceforge.net/javadoc/org/quartz/CronTrigger.html>.)

Use the following examples as a guideline for changing the run interval:

- To run the engine every 5 minutes, change the minutes field to **0/5**.
- To run the engine every 30 minutes, change the minutes field to **0/30**.

- 2** Save the **alerts-config.settings** file.
- 3** To apply the changes, you must restart the HP Release Control service.

To disable the alert engine:

- 1 In the **alerts-config.settings** file, locate the following code:

```
<alerts-config version="4.0-local-build">
  <default-config>
    .
    .
    <!-- use this option to disable the alert engine-->
    <!-- <cron-expression>-1</cron-expression> -->

    <!-- use this option to enable the alert engine every minute-->
    <cron-expression>0 0/1 * * * ?</cron-expression>
```

- 2 Uncomment the expression that disables the alert engine, and comment out the code that enables it, as follows:

```
<alerts-config version="4.0-local-build">
  <default-config>
    .
    .
    <!-- use this option to disable the alert engine-->
    <cron-expression>-1</cron-expression>

    <!-- use this option to enable the alert engine every minute-->
    <!-- <cron-expression>0 0/1 * * * ?</cron-expression> -->
```

- 3 Save the **alerts-config.settings** file.
- 4 To apply the changes, you must restart the HP Release Control service.

First Run of Alert Engine

The first run of the Alert Engine is very heavy on the system, calculating alerts, by default, 2 days (2880 minutes) retroactively. You can change this setting so that the Alert Engine runs on fewer change requests, that is over a shorter retroactive time interval.

To modify this setting:

- 1 In the **alerts-config.settings** file, locate the **<fuse-duration>** element.

```
<alerts-config version="4.0-local-build">
.
.
  <fuse-duration>2880</fuse-duration>
```

- 2 Define a new retroactive time interval, in minutes.
- 3 Save the **alerts-config.settings** file.
- 4 To apply the changes, you must restart the HP Release Control service.

Change-Modify Time Window for Emergency/Modified Activity Alerts

Emergency Activity alerts and Activity Modification alerts are generated for all activities whose schedules intersect the **change-modify time window** defined in the **alerts-config.settings** file.

More specifically:

- An Emergency Activity alert is generated if a new activity is created that is scheduled to start within the change-modify time window.
- An Activity Modification alert is generated if a change is made to an activity whose schedule intersects with the change-modify time window.

The **change-modify time window** can be defined as a window of time surrounding or close to the current time. By default, the change-modify time window is defined as 12 hours (720 min) behind the current time to 24 hours (1440 min) ahead of the current time.

To modify the change-modify time window:

- 1** In the **alerts-config.settings** file, locate the **<change-modify-time-window>** element.

```
<alerts-config version="4.0-local-build">
.
  <!-- This configuration purpose is to decide whether to generate alerts due to change
modification in the given time window:
    1. Emergency Change Alert
    2. Modified Change Alert -->
    <change-modify-time-window>
      <min>-720</min>
      <max>1440</max>
    </change-modify-time-window>
```

- 2** Define a time interval as follows (see examples below):
 - **<min>**. The number of minutes before (negative value) or after (positive value) the current time, representing the beginning of the time window.
 - **<max>**. The number of minutes before (negative value) or after (positive value) the current time, representing the end of the time window.
- 3** Save the **alerts-config.settings** file.
- 4** To apply the changes, you must restart the HP Release Control service.

Examples

The following examples illustrate minimum and maximum values for the time window, and where alerts will or will not be generated.

<p>Scenario 1- No alert generated</p> <ul style="list-style-type: none">➤ Emergency Activity insterted at: 12:00➤ Time window: min = +60; max = +120➤ Activity Start: 12:10; Activity End: 12:30	<p>A horizontal timeline diagram. A green bar representing an activity starts at 12:10 (labeled 'Start Time') and ends at 12:30 (labeled 'End Time'). Below the timeline, a vertical line marks 12:00 as 'Current time'. To the right, two points are marked: 13:00 as 'Current time + 60' and 14:00 as 'Current time + 120'. A red box labeled 'CHANGE-MODIFY TIME WINDOW' spans from 13:00 to 14:00. The activity bar is entirely to the left of the time window.</p>
<p>Scenario 2 - Alert generated</p> <ul style="list-style-type: none">➤ Activity modified at: 12:00➤ Time window: min = +60; max = +120➤ Activity Start: 12:10; Activity End: 13:30	<p>A horizontal timeline diagram. A green bar representing an activity starts at 12:10 (labeled 'Start Time') and ends at 13:30 (labeled 'End Time'). Below the timeline, a vertical line marks 12:00 as 'Current time'. To the right, two points are marked: 13:00 as 'Current time + 60' and 14:00 as 'Current time + 120'. A red box labeled 'CHANGE-MODIFY TIME WINDOW' spans from 13:00 to 14:00. The activity bar overlaps with the time window from 13:00 to 13:30.</p>
<p>Scenario 3 - Alert generated</p> <ul style="list-style-type: none">➤ Emergency activity insterted: 12:00➤ Time Window: min = -60; max = +120➤ Activity Start: 11:30; Activity End: 11:45	<p>A horizontal timeline diagram. A green bar representing an activity starts at 11:30 (labeled 'Start Time') and ends at 11:45 (labeled 'End Time'). Below the timeline, a vertical line marks 12:00 as 'Current time'. To the left, a point is marked 11:00 as 'Current time - 60'. To the right, a point is marked 14:00 as 'Current time + 120'. A red box labeled 'CHANGE-MODIFY TIME WINDOW' spans from 11:00 to 14:00. The activity bar is entirely within the time window.</p>
<p>Scenario 4 - Alert generated</p> <ul style="list-style-type: none">➤ Activity modified at: 12:00➤ min = -60; max = +120➤ Activity Start: 10:30; Activity End: 15:00	<p>A horizontal timeline diagram. A green bar representing an activity starts at 10:30 (labeled 'Start Time') and ends at 15:00 (labeled 'End Time'). Below the timeline, a vertical line marks 12:00 as 'Current time'. To the left, a point is marked 11:00 as 'Current time - 60'. To the right, a point is marked 14:00 as 'Current time + 120'. A red box labeled 'CHANGE-MODIFY TIME WINDOW' spans from 11:00 to 14:00. The activity bar overlaps with the time window from 11:00 to 14:00.</p>

Alert Behavior

You can enable or disable alerts, and define the number of minutes before or after events that you want alerts to be generated.

Each alert is defined in an **<alert>** sub-element, which specifies the type of alert, whether the alert is enabled or not, and if so, the amount of time before or after the event that the alert is to be generated.

For example, the code below indicates that if an activity's implementation is more than 15 minutes late to finish, HP Release Control generates a **ChangeEndLateAlert** alert.

```
<alerts-config version="4.0-local-build">
.
</alerts>
  <alert>
    <alert-type>ChangeEndLateAlert</alert-type>
    <alert-enabled>true</alert-enabled>
    <notification-offset>15</notification-offset>
  </alert>
.
.
</alerts>
```

To configure an alert's behaviour:

- 1** In the **alerts-config.settings** file, locate the **<alerts>** element and then the **<alert>** sub-element of the alert you want to modify.
- 2** Modify the alert's definition as follows:
 - In the **<notification-offset>** attribute, specify the number of minutes before or after the event that the alert is to be generated.
 - To disable the alert, set **<alert-enabled>** to **false**.
- 3** Save the **alerts-config.settings** file.
- 4** To apply the changes, you must restart the HP Release Control service.

Part VIII

Appendices

A

Password Encryption

All HP Release Control passwords may be encrypted, if required. This chapter describes how to encrypt passwords.

To encrypt a password:

- 1 Ensure that your HP Release Control installation directory contains a **security** directory that includes following files:

- private_key.txt
- public_key.txt

If these files do not exist, then run the following in the <HP Release Control installation directory>\utilities\security directory:

```
GenerateKeys.bat
```

- 2 In the <HP Release Control installation directory>\utilities\security directory, run the following:

```
EncryptPassword.bat <options> <password to encrypt>
```

The command line <options> can be:

Option	Description
-f <file> --password-file <file>	Encrypt the passwords in the specified plain-text password file.
-p <password> --password <password>	Encrypt a single plain-text password.

Option	Description
--keys-path <path>	Use the encryption keys located at the specified path. If this option is not specified, the default key location is <ccm-installation>\security.
-h --help	Print this message.

For example, to encrypt a single password, run the following:

```
EncryptPassword.bat -p <password to encrypt>
```

- 3 Copy and paste the generated encrypted password ({**ENCRYPTED**} <**encrypted password**>) into the appropriate HP Release Control configuration file.

To encrypt all the passwords in a file:

- 1 Ensure that the each password in the file is on a separate line, as in the following example:

```
<password1>
<password2>
<password3>
```

- 2 In the <**HP Release Control installation directory**>\utilities\security directory, run the following:

```
EncryptPassword.bat -f <file name>
```

A file with the same name and the extension **.enc** is created. This file includes an encrypted password for each password included in the original file.

- 3 Copy and paste each generated encrypted password ({**ENCRYPTED**} <**encrypted password**>) into the appropriate HP Release Control configuration file.

B

GMT Time Zones

The following list describes GMT time zones for locations throughout the world.

(GMT -11) Pacific/Niue	(GMT -11) Pacific/Apia
(GMT -11) MIT	(GMT -11) Pacific/Pago_Pago
(GMT -10) Pacific/Tahiti	(GMT -10) Pacific/Fakaofo
(GMT -10) Pacific/Honolulu	(GMT -10) HST
(GMT -10) America/Adak	(GMT -10) Pacific/Rarotonga
(GMT -9) Pacific/Marquesas	(GMT -9) Pacific/Gambier
(GMT -9) America/Anchorage	(GMT -9) AST
(GMT -8) Pacific/Pitcairn	(GMT -8) America/Vancouver
(GMT -8) America/Tijuana	(GMT -8) America/Los_Angeles
(GMT -8) PST	(GMT -7) America/Dawson_Creek
(GMT -7) America/Phoenix	(GMT -7) PNT
(GMT -7) America/Edmonton	(GMT -7) America/Mazatlan
(GMT -7) America/Denver	(GMT -7) MST
(GMT -6) America/Belize	(GMT -6) America/Regina
(GMT -6) Pacific/Galapagos	(GMT -6) America/Guatemala
(GMT -6) America/Tegucigalpa	(GMT -6) America/El_Salvador
(GMT -6) America/Costa_Rica	(GMT -6) America/Winnipeg
(GMT -6) Pacific/Easter	(GMT -6) America/Mexico_City
(GMT -6) America/Chicago	(GMT -6) CST
(GMT -5) America/Porto_Acre	(GMT -5) America/Bogota
(GMT -5) America/Guayaquil	(GMT -5) America/Jamaica
(GMT -5) America/Cayman	(GMT -5) America/Managua
(GMT -5) America/Panama	(GMT -5) America/Lima
(GMT -5) America/Indianapolis	(GMT -5) IET
(GMT -5) America/Nassau	(GMT -5) America/Montreal

(GMT -5) America/Havana	(GMT -5) America/Port-au-Prince
(GMT -5) America/Grand_Turk	(GMT -5) America/New_York
(GMT -5) EST	(GMT -4) America/Antigua
(GMT -4) America/Anguilla	(GMT -4) America/Curacao
(GMT -4) America/Aruba	(GMT -4) America/Barbados
(GMT -4) America/La_Paz	(GMT -4) America/Manaus
(GMT -4) America/Dominica	(GMT -4) America/Santo_Domingo
(GMT -4) America/Grenada	(GMT -4) America/Guadeloupe
(GMT -4) America/Guyana	(GMT -4) America/St_Kitts
(GMT -4) America/St_Lucia	(GMT -4) America/Martinique
(GMT -4) America/Montserrat	(GMT -4) America/Puerto_Rico
(GMT -4) PRT	(GMT -4) America/Port_of_Spain
(GMT -4) America/St_Vincent	(GMT -4) America/Tortola
(GMT -4) America/St_Thomas	(GMT -4) America/Caracas
(GMT -4) Antarctica/Palmer	(GMT -4) Atlantic/Bermuda
(GMT -4) America/Cuiaba	(GMT -4) America/Halifax
(GMT -4) Atlantic/Stanley	(GMT -4) America/Thule
(GMT -4) America/Asuncion	(GMT -4) America/Santiago
(GMT -3) America/St_Johns	(GMT -3) CNT
(GMT -3) America/Fortaleza	(GMT -3) America/Cayenne
(GMT -3) America/Paramaribo	(GMT -3) America/Montevideo
(GMT -3) America/Buenos_Aires	(GMT -3) AGT
(GMT -3) America/Godthab	(GMT -3) America/Miquelon
(GMT -3) America/Sao_Paulo	(GMT -3) BET
(GMT -2) America/Noronha	(GMT -2) Atlantic/South_Georgia
(GMT -1) Atlantic/Jan_Mayen	(GMT -1) Atlantic/Cape_Verde
(GMT -1) America/Scoresbysund	(GMT -1) Atlantic/Azores
(GMT +0) Africa/Ouagadougou	(GMT +0) Africa/Abidjan
(GMT +0) Africa/Accra	(GMT +0) Africa/Banjul
(GMT +0) Africa/Conakry	(GMT +0) Africa/Bissau
(GMT +0) Atlantic/Reykjavik	(GMT +0) Africa/Monrovia
(GMT +0) Africa/Casablanca	(GMT +0) Africa/Timbuktu
(GMT +0) Africa/Nouakchott	(GMT +0) Atlantic/St_Helena
(GMT +0) Africa/Freetown	(GMT +0) Africa/Dakar
(GMT +0) Africa/Sao_Tome	(GMT +0) Africa/Lome
(GMT +0) GMT	(GMT +0) UTC

(GMT +0) Atlantic/Faeroe	(GMT +0) Atlantic/Canary
(GMT +0) Europe/Dublin	(GMT +0) Europe/Lisbon
(GMT +0) Europe/London	(GMT +1) Africa/Luanda
(GMT +1) Africa/Porto-Novo	(GMT +1) Africa/Bangui
(GMT +1) Africa/Kinshasa	(GMT +1) Africa/Douala
(GMT +1) Africa/Libreville	(GMT +1) Africa/Malabo
(GMT +1) Africa/Niamey	(GMT +1) Africa/Lagos
(GMT +1) Africa/Ndjamena	(GMT +1) Africa/Tunis
(GMT +1) Africa/Algiers	(GMT +1) Europe/Andorra
(GMT +1) Europe/Tirane	(GMT +1) Europe/Vienna
(GMT +1) Europe/Brussels	(GMT +1) Europe/Zurich
(GMT +1) Europe/Prague	(GMT +1) Europe/Berlin
(GMT +1) Europe/Copenhagen	(GMT +1) Europe/Madrid
(GMT +1) Europe/Gibraltar	(GMT +1) Europe/Budapest
(GMT +1) Europe/Rome	(GMT +1) Europe/Vaduz
(GMT +1) Europe/Luxembourg	(GMT +2) Africa/Tripoli
(GMT +1) Europe/Monaco	(GMT +1) Europe/Malta
(GMT +1) Africa/Windhoek	(GMT +1) Europe/Amsterdam
(GMT +1) Europe/Oslo	(GMT +1) Europe/Warsaw
(GMT +1) Europe/Stockholm	(GMT +1) Europe/Belgrade
(GMT +1) Europe/Paris	(GMT +1) ECT
(GMT +2) Africa/Bujumbura	(GMT +2) Africa/Gaborone
(GMT +2) Africa/Lubumbashi	(GMT +2) Africa/Maseru
(GMT +2) Africa/Blantyre	(GMT +2) Africa/Maputo
(GMT +2) Africa/Kigali	(GMT +2) Africa/Khartoum
(GMT +2) Africa/Mbabane	(GMT +2) Africa/Lusaka
(GMT +2) Africa/Harare	(GMT +2) CAT
(GMT +2) Africa/Johannesburg	(GMT +2) Europe/Sofia
(GMT +2) Europe/Minsk	(GMT +2) Asia/Nicosia
(GMT +2) Europe/Tallinn	(GMT +2) Africa/Cairo
(GMT +2) ART	(GMT +2) Europe/Helsinki
(GMT +2) Europe/Athens	(GMT +2) Asia/Jerusalem
(GMT +2) Asia/Amman	(GMT +2) Asia/Beirut
(GMT +1) Europe/Vilnius	(GMT +2) Europe/Riga
(GMT +2) Europe/Chisinau	(GMT +2) Europe/Bucharest
(GMT +2) Europe/Kaliningrad	(GMT +2) Asia/Damascus

(GMT +2) Europe/Kiev	(GMT +2) Europe/Istanbul
(GMT +2) EET	(GMT +3) Asia/Bahrain
(GMT +3) Africa/Djibouti	(GMT +3) Africa/Asmera
(GMT +3) Africa/Addis_Ababa	(GMT +3) EAT
(GMT +3) Africa/Nairobi	(GMT +3) Indian/Comoro
(GMT +3) Asia/Kuwait	(GMT +3) Indian/Antananarivo
(GMT +3) Asia/Qatar	(GMT +3) Africa/Mogadishu
(GMT +3) Africa/Dar_es_Salaam	(GMT +3) Africa/Kampala
(GMT +3) Asia/Aden	(GMT +3) Indian/Mayotte
(GMT +3) Asia/Riyadh	(GMT +3) Asia/Baghdad
(GMT +2) Europe/Simferopol	(GMT +3) Europe/Moscow
(GMT +3) Asia/Tehran	(GMT +3) MET
(GMT +4) Asia/Dubai	(GMT +4) Indian/Mauritius
(GMT +4) Asia/Muscat	(GMT +4) Indian/Reunion
(GMT +4) Indian/Mahe	(GMT +4) Asia/Yerevan
(GMT +4) NET	(GMT +4) Asia/Baku
(GMT +4) Asia/Aqtau	(GMT +4) Europe/Samara
(GMT +4) Asia/Kabul	(GMT +5) Indian/Kerguelen
(GMT +4) Asia/Tbilisi	(GMT +5) Indian/Chagos
(GMT +5) Indian/Maldives	(GMT +5) Asia/Dushanbe
(GMT +5) Asia/Ashkhabad	(GMT +5) Asia/Tashkent
(GMT +5) Asia/Karachi	(GMT +5) PLT
(GMT +5) Asia/Bishkek	(GMT +5) Asia/Aqtobe
(GMT +5) Asia/Yekaterinburg	(GMT +5) Asia/Calcutta
(GMT +5) IST	(GMT +5) Asia/Katmandu
(GMT +6) Antarctica/Mawson	(GMT +6) Asia/Thimbu
(GMT +6) Asia/Colombo	(GMT +6) Asia/Dacca
(GMT +6) BST	(GMT +6) Asia/Almaty
(GMT +6) Asia/Novosibirsk	(GMT +6) Indian/Cocos
(GMT +6) Asia/Rangoon	(GMT +7) Indian/Christmas
(GMT +7) Asia/Jakarta	(GMT +7) Asia/Phnom_Penh
(GMT +7) Asia/Vientiane	(GMT +7) Asia/Saigon
(GMT +7) VST	(GMT +7) Asia/Bangkok
(GMT +7) Asia/Krasnoyarsk	(GMT +8) Antarctica/Casey
(GMT +8) Australia/Perth	(GMT +8) Asia/Brunei
(GMT +8) Asia/Hong_Kong	(GMT +8) Asia/Ujung_Pandang

(GMT +8) Asia/Macao	(GMT +8) Asia/Kuala_Lumpur
(GMT +8) Asia/Manila	(GMT +8) Asia/Singapore
(GMT +8) Asia/Taipei	(GMT +8) Asia/Shanghai
(GMT +8) CTT	(GMT +8) Asia/Ulan_Bator
(GMT +8) Asia/Irkutsk	(GMT +9) Asia/Jayapura
(GMT +9) Asia/Pyongyang	(GMT +9) Asia/Seoul
(GMT +9) Pacific/Palau	(GMT +9) Asia/Tokyo
(GMT +9) JST	(GMT +9) Asia/Yakutsk
(GMT +9) Australia/Darwin	(GMT +9) ACT
(GMT +9) Australia/Adelaide	(GMT +9) Australia/Broken_Hill
(GMT +10) Australia/Hobart	(GMT +10) Antarctica/ DumontDURville
(GMT +10) Pacific/Truk	(GMT +10) Pacific/Guam
(GMT +10) Pacific/Saipan	(GMT +10) Pacific/Port_Moresby
(GMT +10) Australia/Brisbane	(GMT +10) Asia/Vladivostok
(GMT +10) Australia/Sydney	(GMT +10) AET
(GMT +10) Australia/Lord_Howe	(GMT +11) Pacific/Ponape
(GMT +11) Pacific/Efate	(GMT +11) Pacific/Guadalcanal
(GMT +11) SST	(GMT +11) Pacific/Noumea
(GMT +11) Asia/Magadan	(GMT +11) Pacific/Norfolk
(GMT +12) Pacific/Kosrae	(GMT +12) Pacific/Tarawa
(GMT +12) Pacific/Majuro	(GMT +12) Pacific/Nauru
(GMT +12) Pacific/Funafuti	(GMT +12) Pacific/Wake
(GMT +12) Pacific/Wallis	(GMT +12) Pacific/Fiji
(GMT +12) Antarctica/McMurdo	(GMT +12) Asia/Kamchatka
(GMT +12) Pacific/Auckland	(GMT +12) NST
(GMT +12) Pacific/Chatham	(GMT +13) Pacific/Enderbury
(GMT +13) Pacific/Tongatapu	(GMT +13) Asia/Anadyr
(GMT +14) Pacific/Kiritimati	

C

Preconfigured Change Request Fields

This appendix lists HP Release Control's default set of preconfigured change request fields, which includes two types of fields: predefined fields and custom fields. The data for these fields can originate from the service desk or from HP Release Control.

This appendix includes:

- Predefined Fields on page 299
- Custom Fields on page 302

Predefined Fields

Predefined fields are non-editable fields based on ITIL standards, which are common to most service desk applications. The following **Predefined** fields are included in HP Release Control:

Name	Description
actual-end-time	The actual change activity's completion time.
actual-start-time	The actual change activity's start time.
calculated-risk	The risk value calculated for the change request.
collision-severity	The collision severity level evaluated for the request.
contact-email	The email of the contact person designated as responsible for the change request's creation.
contact-location	The location of the contact person designated as responsible for the change request's creation.

Name	Description
contact-person	Name of the contact person designated as responsible for the change request's creation.
contact-phone	The phone number of the contact person designated as responsible for the change request's creation.
creating-service-desk	The service desk on which this change request was created.
creation-time	The time at which the change request was created.
description	A description of the change request.
down-end-time	The end of the down time period during change implementation.
down-start-time	The beginning of the down time period during change implementation.
ignore-detection	Indicates whether HP Release Control should try to detect the change request or skip its detection during the detection stage.
impact-severity	The impact severity level evaluated for the request.
implementation-outcome	A report of the change implementation. The implementor submits this report.
implementors	A list of users assigned to implement the change.
internal-id	An ID value used internally by HP Release Control.
is-abnormal	Used to determine if a change request is considered normal in terms of the time period in which it was or should be implemented.
lastImpact-cis-label	A list of all CIs involved in the impact analysis calculation for the relevant change request.
last-impact-time	The last time the change request's impact was calculated.
last-update-time	The last time the change request was updated.

Name	Description
number-of-comments	The number of comments created for the change request.
origin-url	A URL address that points to the original change request in the service desk application.
planned-end-time	The change activity's planned end time.
planned-start-time	The change activity's planned start time.
priority	A priority assigned to the request by the creating user.
review-comments	Comments about the change request. Submitted during post implementation review.
review-customer-satisfaction	The customer (the person who opened the request ticket) satisfaction for the change request. Submitted during post implementation review.
review-outcome	The change request's outcome. Submitted during post implementation review.
review-planning-satisfaction	The level of planning satisfaction for the change request. Submitted during post implementation review.
review-time	The time the change request was reviewed (post implementation review).
request-id	An ID value that originated in the service desk application.
source-til-entity	The ITIL entity out of which the change request was created (incident, problem, requirement).
status	The current status of the change request.
summary	A short summary of the change request.
ticket-level	The hierarchy level of the change request. This information originates from service desk.
user-estimated-risk	The risk level of the change request as evaluated by the creating user.

Custom Fields

Custom fields are editable fields that are recommended for use in order to optimize HP Release Control analysis features. The following **Custom** fields are included in HP Release Control:

Name	Description
changed-ci-list	The list of CIs that are part of the planned change. Submitted by the user who creates the change.
departments-involved	The number of different departments from which the change implementors emanate.
implementor-experience	The implementor's level of experience regarding the work involved in the change.
involved-users	The number of users using the business CIs involved in the change.
is-backout-possible	Indicates whether there is a valid backout plan.
is-outage-planned	Indicates whether an outage is planned as part of the change.
is-sox-app-involved	Indicates whether a SOX application is involved in the change.
is-tested	Indicates whether the change was tested in a testing environment.
new-deployment	Indicates whether the change is a deployment of new hardware, a major feature, or a business CI.
past-experience	The success ratio of similar changes in the past.
recent-incidents	Indicates whether a business CI involved in the change had major incidents within the two previous weeks.
site-location	The location of the site where the change will take place. Can be used in collision calculation.
sla-status	Indicates whether the SLA of a business CI involved in the change is close to being breached.

Name	Description
technology-experience	The amount of time (in quarters) that has transpired since the technology involved in the change was introduced to the organization.
vip-users	Indicates whether there are any VIP users using business CIs involved in the change.

D

Log Files

This appendix describes the log files available in HP Release Control. These log files are located in the <**HP Release Control installation directory**>\logs directory.

The following table describes each of the HP Release Control log files:

Log name	Usage
ccm_axis	Log file for Axis Open Source, which facilitates Web service communication between a service desk application and HP Release Control.
ccm_c3p0	Log file for the interactions with the database involving the c3p0 database connection pool.
ccm_client	Log file for requests initiated from the user interface or from Web services.
ccm_cmdb	Log file for the module responsible for interfacing with Mercury Application Mapping.
ccm_datamodel	Log file for most of the interactions between HP Release Control and the database.
ccm_general	Log file for the HP Release Control console messages that were formerly displayed in the Tomcat console.
ccm_genericinfra	Log file for infrastructure utilities such as settings, scripting, and security.
ccm_hibernate	Log file for the interactions with the database involving the hibernate object to database mapper.
ccm_infra	Log file for infrastructure utilities that depend on the database and enumerations.

Log name	Usage
ccm_platform	Log file for the main HP Release Control platform. Contains information regarding the change request analysis process (for example, impact and collision analysis), notification deliveries, and risk recalculations, as well as other data.
ccm_reporting	Log file for the HP Release Control reporting module.
ccm_sdi	Log file for the Service Desk Integration module (SDI). Contains information on the process of collection and conversion of change requests, until they reach the CCM_QUEUED_CHANGES input queue of the HP Release Control platform.

When you are investigating an incident, it is recommended that you begin by looking through the log files for the Service Desk Integration module (**ccm_sdi**) or for the main HP Release Control platform (**ccm_platform**), depending on which part of the change request process you want to investigate.

Note: You configure the log file properties in the <HP Release Control installation directory>\conf\ccmlog4j.properties file. This file contains a list of log file definitions that you can modify. For more information about configuring the log file properties, see “Configuring Log File Properties” on page 274.

E

Database Configuration and Maintenance

This appendix provides important guidelines for configuring and maintaining both Microsoft SQL Server and Oracle Server databases.

This appendix includes:

- Guidelines for MS SQL Server Databases on page 307
- Guidelines for Oracle Server Databases on page 309

Guidelines for MS SQL Server Databases

It is recommended that you design a maintenance plan, update index statistics, and activate the snapshot isolation feature for the MS SQL Server database as described below.

Data and Index Page Reorganization

The HP Release Control database may become fragmented after processing a certain number of requests. To prevent fragmentation from seriously affecting client-side performance, it is recommended that you design a maintenance plan that causes the indexes on the database tables to be dropped and recreated.

To create a maintenance plan:

- 1** Open the MS SQL Server Enterprise Manager.
- 2** Under the relevant MS SQL Server registration, select **Management**.
- 3** Right-click **Database Maintenance Plans** and select **New Maintenance Plan**. The Database Maintenance Plan Wizard opens to guide you through the required definition parameters.

- 4 Choose the database for which you want to create a maintenance plan and click **Next**.
- 5 Select the **Reorganize data and index pages** check box and choose the **Change free space per page percentage to** option.
- 6 Set the free space per page to **10** percent and click **Next**.
- 7 Accept all the other default settings in the wizard and save your maintenance plan.

Note: After the maintenance plan has been executed, statistics should be updated.

Updating Statistics

MS SQL Server 2000 allows statistical information regarding the distribution of values in a column to be created. This statistical information can be used by the query processor to determine the optimal strategy for evaluating a query. When an index is being created, MS SQL Server automatically stores statistical information regarding the distribution of values in the indexed columns. The query optimizer in MS SQL Server uses these statistics to estimate the cost of using the index for a query. As the data in a column changes, index and column statistics can become out-of-date and cause the query optimizer to make less than optimal decisions regarding the processing of a query.

It is recommended that you update index statistics to provide the query optimizer with up-to-date information about the distribution of data values in the tables. With more information about the data stored in the database, the query optimizer is able to make better judgments about the best way to access data.

By default, the **auto update statistics** database option is enabled, but if this option has been disabled, it is strongly recommended that you create an automatic task to update statistics for the database on a daily basis, as the data is frequently changed. The job should execute the **sp_updatestats** API against the specific database.

Activating Snapshot Isolation

We strongly recommend using the snapshot isolation feature in SQL Server 2005. To do this, execute the following command once after creating the database:

```
alter database <ccm_database_name> set read_committed_snapshot on
```

For more information about the SQL Server snapshot isolation feature, see: [http://msdn.microsoft.com/en-us/library/tcbchxcb\(VS.80\).aspx](http://msdn.microsoft.com/en-us/library/tcbchxcb(VS.80).aspx)

Guidelines for Oracle Server Databases

It is recommended that you set cache attributes and collect statistics for the Oracle Server database as described below.

Setting Cache Attributes

Set the **cache****nocache** attribute of the **CCM_CHANGES** table to **cache** by executing the following statement:

```
alter table CCM_CHANGES cache;
```

Gathering Statistics

It is recommended that you gather statistics once a day. To do so effectively, perform the steps in the following procedure.

To gather statistics once a day:

- 1 Turn on the **MONITORING** flag to the tables in the HP Release Control schema by executing the following:

```
exec dbms_stats.alter_schema_tab_monitoring('<name of oracle schema>',TRUE);
```

2 Create the following job to collect statistics on a daily basis at midnight:

```
declare
  job_num number;
begin
  dbms_job.submit(job_num,'dbms_stats.gather_schema_stats
(ownname=>"<name of oracle schema>", options=>"GATHER AUTO",
cascade=>TRUE);', sysdate+1/1440,'trunc(sysdate+1)');
  commit;
end;
/
```

Important:

- The **job_queue_processes** parameter must be set to a positive value to allow the job to be executed.
 - As of Oracle 10g, the statistics gathering process is automated by default. There is an automatic job named **GATHER_STATS_JOB** running on a daily basis and there is therefore no need to perform the actions described in the above procedure.
-

F

Utilities

This appendix describes a number of HP Release Control utilities that are available.

This appendix includes:

- Change Cleaner on page 311
- User Importer on page 312
- File Locator on page 313
- Populate Batch File on page 314
- Queue Manager on page 315

Change Cleaner

The change cleaning utility counts the number of change requests in the database and deletes all these requests from the database.

To count and delete all the requests in the database:

Run the **ChangeCleaner.bat** file located in the <HP Release Control installation directory>\utilities\ChangeCleaner directory.

User Importer

The user importer utility enables you to import a list of defined users and user properties from a CSV file to HP Release Control.

To import users via this utility:

- 1 Change the command line directory to to: <HP Release Control installation directory>\utilities\ImportUsers
- 2 Run the following command:

```
ImportUsers.bat <options>
```

The command line <options> can be:

Option	Description
--list-charsets	Since you can use this utility to import files from a variety of character sets, use this option to see a list of the available character sets. You can then use the -c option to specify a character set.
--charset <charset>	Specify the character set of the file (useful for Asian languages). If this option is not specified, the default file character set is UTF-8.
-f <file> --file <file>	Imports the file specified in <file>.
-h --help	Print this message.

The following is an example of a CSV file with one user:

```
USERNAME, PASSWORD, FIRST_NAME, LAST_NAME, EMAIL, BUSINESS_ID  
jdoe, jdoe, John, Doe, jon.doe@hp.com, jdoe
```


File Locator

The file locator utility enables you to locate HP Release Control configuration files, log files, and/or files that were modified following installation.

To use the file locator utility:

- 1** Change the command line directory to **<HP Release Control installation directory>\utilities\LogGrabber**.
- 2** Run the following command:

```
LogGrabber.bat <options>
```

The command line <options> can be:

Option	Description
-c --conf	Locate configuration files.
-l --logs	Locate log files.
-m --modified	Locate files that were modified following installation.
-h --help	Print this message.

- To locate a combination of the above, combine the above commands. For example, to locate configuration, log, and modified files, run:

```
LogGrabber.bat -clm
```

Populate Batch File

The populate batch file enables you to create tables in the HP Release Control database.

Note: This utility deletes any data that was previously stored in the database.

To use the populate batch file:

- 1** Change the command line directory to <HP Release Control installation directory>\tomcat\webapps\ccm.
- 2** Run the following command:

```
populate.bat -ir
```

Queue Manager

The queue manager utility enables you to manage the change requests that are waiting to enter HP Release Control from the service desk application.

To use the queue manager utility:

- 1 Change the command line directory to <HP Release Control installation directory>\utilities\QueueManager.
- 2 Run the following command:

```
QueueManager.bat <options>
```

The command line <options> can be:

Option	Description
-l --list	List all the change requests in the queue.
--remove all	Delete all change requests in the queue.
--remove first	Delete the first change request in the queue.
-h --help	Print this message.

For example, to delete the first change request in the queue, run:

```
QueueManager.bat --remove first
```


G

HP Release Control Federation Adapter

This chapter provides information on the HP Release Control Federation adapter. The adapter is compatible with HP Universal CMDB, version 7.5 or later.

This chapter includes:

- About the Release Control Federation Adapter on page 317
- Configuring the Federation Adapter on page 319
- Retrieving Planned Change Attributes on page 320
- Adding Custom Fields to the Federation Adapter on page 320

About the Release Control Federation Adapter

The HP Release Control Federation adapter supports the retrieval of data from HP Release Control. Every request to HP Release Control to calculate a federated query is made through this adapter. The adapter supports the **Planned Change** CI type. You use **service desk** links to create the query.

The following use cases describe how the adapter can be employed:

- A user needs to display **planned changes to any CI** within a specific time frame.
- A user needs to display **planned changes to specified system CIs**.

In this case, HP Universal CMDB retrieves changes that directly change system CIs and not changes that indirectly affect system CIs.

- A user needs to display **planned changes to a specified business CIs**.

In this case, HP Universal CMDB retrieves changes that directly affect business CIs and not changes that indirectly affect business CIs.

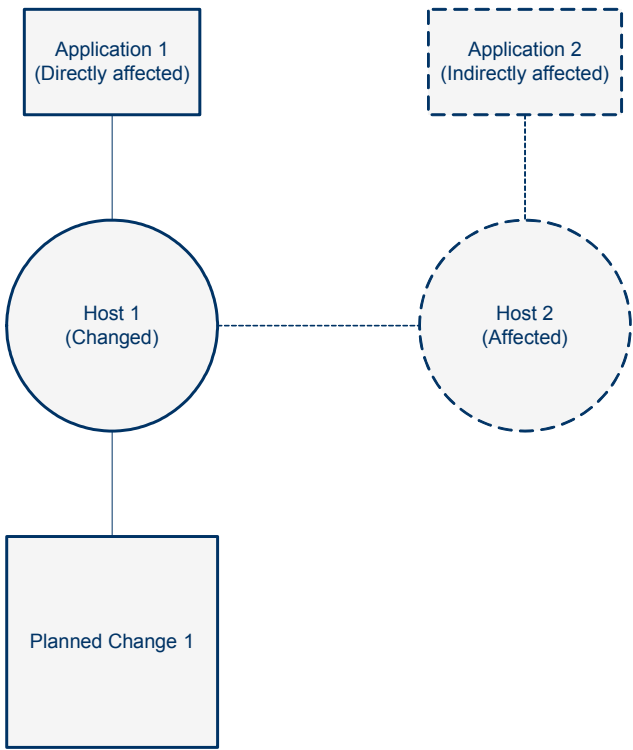
In all of the above cases, HP Universal CMDB retrieves parent changes and independent tasks. HP Universal CMDB does not retrieve tasks that are included in a parent request.

Example

The following example illustrates some of the use cases. Assume there is one planned change in HP Release Control, **Planned Change 1**.

Planned Change 1 will be performed on **Host 1**. **Application 1** runs on **Host 1** and is therefore directly affected by the change.

Host 2 is connected to **Host 1** and may be affected by **Planned Change 1** but no actual change is made to **Host 2**. **Application 2** runs on **Host 2** and may be indirectly affected by the change.



If the user runs a query to retrieve planned changes to **Host 1** or **Application 1**, HP Universal CMDB will display **Planned Change 1**, because this change directly affects those CIs.

If the user runs a query to retrieve planned changes to **Host 2** or **Application 2**, HP Universal CMDB will not display any changes because there are no changes that directly affect those CIs.

Configuring the Federation Adapter

This section describes how to configure the HP Release Control Federation adapter to work with HP Universal CMDB.

For more information see the *HP Universal CMDB Model Management* guide.

To configure the adapter:

- 1 Deploy the following files in the HP Universal CMDB Package Manager:
 - <Release Control installation directory>\MAM\7.5\federation\serviceDeskAdapter.zip
 - <Release Control installation directory>\MAM\7.5\federation\ccm_federation.zip
- 2 Copy the <Release Control installation directory>\MAM\7.5\federation\CcmChangeAdapter directory to the following locations:
 - <UCMDB installation directory>\UCMDBServer\j2f\fcmdb\CodeBase\
- 3 Reload the **CcmChangeAdapter** in the HP Universal CMDB jmx-console.
- 4 In the HP Universal CMDB go to **Settings > Federated CMDB** and configure the **CcmChangeAdapter**. Enter the following required details:
 - **Name.** The logical name of the adapter.
 - **Host.** The URL of HP Release Control.
 - **User.** The user name of an administrator user in HP Release Control.
 - **Password.** The password of the administrator user specified above.

Retrieving Planned Change Attributes

HP Universal CMDB contains a list of the **planned change** attributes in the selected in the **CI Type Manager Attributes** tab. HP Universal CMDB retrieves **planned change** attributes from HP Release Control using the following rule:

HP Universal CMDB converts all underscores (_) in the attribute names and converts them to hyphens (-) and searches through the HP Release Control fields for matching fields. The list of fields in HP Release Control is located in the Administrator module **Fields** tab.

In addition, specific attribute properties are mapped to specific fields in the **convertfields.properties** file, located in the **CcmChangeAdapter** directory. You can map additional attributes to fields HP Release Control in this file.

Adding Custom Fields to the Federation Adapter

This section explains how to add custom fields to the Federation adapter.

To add new custom fields to the Federation adapter:

- 1** In HP Release Control, add the relevant fields in the Administrator module **Fields** tab. For more information about adding custom fields, see “Creating or Modifying Change Request Fields” on page 59.
- 2** In HP Universal CMDB, go to the **planned change** CI type and add the new attribute names.
 - Use the same name for the attribute as you used for the custom field that you created in HP Release Control. However, if you used a hyphen (-) in the field name, substitute the hyphen for an underscore (_) in the name of the attribute.
 - If you want to use an attribute name that is different from the custom field name, you can map the attribute name to a specific field name in the **convertfields.properties** file, located in the **CcmChangeAdapter** directory.

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