

HP Release Control

for the Windows® operating systems

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User Guide

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Table of Contents

Welcome to This Guide	9
How This Guide Is Organized	10
Who Should Read This Guide	11
HP Release Control Documentation	11
Additional Online Resources.....	12

PART I: INTRODUCTION

Chapter 1: Introduction to HP Release Control.....	17
Overview of HP Release Control	18
Accessing HP Release Control	19
Chapter 2: Configuring User Settings.....	21
Viewing and Configuring Current User Properties.....	22
Associating Business CIs with the Current User	24
Chapter 3: Filtering Change Requests, Activities, and Action Items..	27
About Using Filters	27
Defining a Change Request or Activity Filter	31
Filter Criteria for Activities and Change Requests	34
Defining an Action Items Filter.....	46
Managing Filters	50

PART II: ANALYZING CHANGES

Chapter 4: The Analysis Module at a Glance	55
Understanding the Analysis Module.....	56
Working with the Change Requests Toolbar	59
Working with the Action Items Toolbar	61
Configuring Preferences for the Analysis Module	64
Chapter 5: Viewing Change Requests in List and Calendar Views	67
Viewing Change Requests in the List View.....	68
Viewing Change Requests in the Calendar View.....	73
Generating Reports in the List and Calendar Views.....	78

Chapter 6: Working with the Timeline Views.....	81
The Timeline View at a Glance	82
Viewing Change Requests, Business CIs, and Implementors in the Timeline View	83
Viewing Impact Severity Levels.....	86
Viewing Time Period-Related Data	86
Chapter 7: Working in the Action Items Mode	89
About Action Items	90
Viewing Action Items	91
Working with Action Items.....	95
Chapter 8: Viewing Change Request Summary Information	99
Viewing Change Request Overviews.....	99
Viewing Change Request Details	102
Chapter 9: Viewing Impact Analysis Results.....	105
Working with the Impact Tab.....	105
Viewing Impact Severity Levels of System CIs.....	106
Viewing Impact Severity Levels of Business CIs	107
Viewing CI Attributes.....	107
Viewing Impact Graphs.....	107
Chapter 10: Viewing Change Request Collisions	109
Understanding Change Request Collisions	109
Viewing Collision Details.....	113
Performing a Customized Collision Calculation	123
Chapter 11: Viewing Change Request Risk Analysis.....	125
Understanding Risk Analysis.....	125
Example of Risk Analysis Calculation	126
Working with the Risk Tab	129
Chapter 12: Similar Changes	133
Viewing Similar Changes	134
Working With Similar Changes	135
Chapter 13: Change Planner.....	141
About The Change Planner.....	142
The Change Planner at a Glance.....	143
Running a Simulation	145
Viewing Simulation Results.....	146
Saving Change Request Details to the Service Desk	148

Chapter 14: Working with Change Request Collaboration.....	151
Working with the Collaborate Tab	151
Viewing Action Items	152
Viewing and Adding Discussion Threads and Comments	153
Resolving Open Change Requests.....	156
Chapter 15: Reviewing Changes	161
Reviewing Post Implementation Conclusions	161
Reviewing the Change Request Implementation Event Log	164
Reviewing Change Request Verification Information	165
Chapter 16: Viewing Detected and Latent Changes	167
Understanding Scheduled and Discovered Changes	168
Viewing Detected Changes	168
Viewing Latent Changes	169

PART III: MONITORING AND IMPLEMENTING ACTIVITIES

Chapter 17: Monitoring Activities	173
Director at a Glance.....	174
Viewing Activities on the Timeline.....	176
Viewing Activity Information	178
Updating Activity Status	185
Adjusting Activity Schedules.....	186
Activity Alerts	187
Communicating with Other Users.....	191
Chapter 18: Implementing Activities	193
Implementor Module at a Glance	194
Managing Activity Implementation	195
Communicating with Other Users.....	197
Chapter 19: User Communication	199
Activity Chat Rooms	200
Custom Chat Rooms	202
Participating in Multiple Chat Rooms	203

PART IV: DASHBOARD

Chapter 20: Working with the Dashboard207
Viewing the Default Portlets208
Trends Portlets.....209
Analysis Portlets212
Post Implementation Portlets218
Working with Dashboard Pages.....222
Personalizing the Dashboard223
Index.....231

Welcome to This Guide

Welcome to the *HP Release Control User Guide*, which explains how to work with 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 10
- Who Should Read This Guide on page 11
- HP Release Control Documentation on page 11
- Additional Online Resources on page 12

How This Guide Is Organized

This guide contains the following parts:

Part I Introduction

Describes the various components of the HP Release Control application as well as how to configure properties for the current HP Release Control user and how to filter change requests, action items, and activities.

Part II Analyzing Changes

Describes the different change request views and the change request information displayed across the various tabs in the Analysis module.

Part III Monitoring and Implementing Activities

Describes the Director module where you can monitor the status of change requests scheduled for implementation, the Implementor module where you manage the activities you are implementing, and how you can communicate between the them.

Part IV Dashboard

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

Who Should Read This Guide

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

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/hpsoftwaresupport.

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

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Part I

Introduction

1

Introduction to HP Release Control

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

This chapter includes:

- Overview of HP Release Control on page 18
- Accessing HP Release Control on page 19

Overview of HP Release Control

In a typical release life cycle, after a change enters the system, the change goes through an **approval**, **implementation**, and **review** phase. HP Release Control supports each one of these phases in the release life cycle.

Approval

During the approval phase, the **Analysis module** provides a detailed analysis of each change request in the system. Change Advisory Board (CAB) members can view information such as the potential impact of the change and the possible risk involved in implementation. The CAB uses this information to make more informed and accurate decisions regarding the approval of planned changes.

In addition, the **collaboration feature** enables CAB members to provide feedback about planned changes and approve or reject the changes.

Implementation

During implementation, the **Director and Implementor modules** provide real-time information regarding change activities. Implementors and release teams are able to monitor the status of all change activities on a 24-hour timeline view. They receive alerts about issues such as scheduling, collisions and delays and use the implementation guidelines that were drawn up in the Analysis module during the approval phase.

Review

After implementation, the **Post Implementation Review (PIR) feature** provides a platform for reviewers to present their conclusions regarding the implemented change. Using information collected during the implementation phase, reviewers provide feedback about the overall success of the change and satisfaction levels of relevant parties.

Management and Administration

During the entire release life cycle, IT managers use the HP Release Control **Dashboard module** to view graphic displays of change request and activity data in real time. HP Release Control Administrators use the **Administration module** to configure the HP Release Control properties and perform administration tasks in the system.

Accessing HP Release Control

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

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

- 1 Configure the user authentication mode, as described in the *HP Release Control Installation and Configuration Guide*.
- 2 In the Web browser, enter the URL http://<server_name>:<Tomcat server port>/ccm if you are not working with an identity management system, or http://<server_name>/ccm if you are working with an identity management system, where **server_name** is the name or IP address of the HP Release Control server.
- 3 Enter the login parameters (user name and password) of a user defined by the administrator and assigned to you, and click **Log In**. After logging in, the user name appears in the top right-hand corner of the screen.

To log out of HP Release Control:

When you have completed your session, click **Logout** in the top right-hand corner of the screen.

2

Configuring User Settings

This chapter describes how to view and configure user properties for the current HP Release Control user and how to select the business CIs you want to associate with the current user.

This chapter includes:

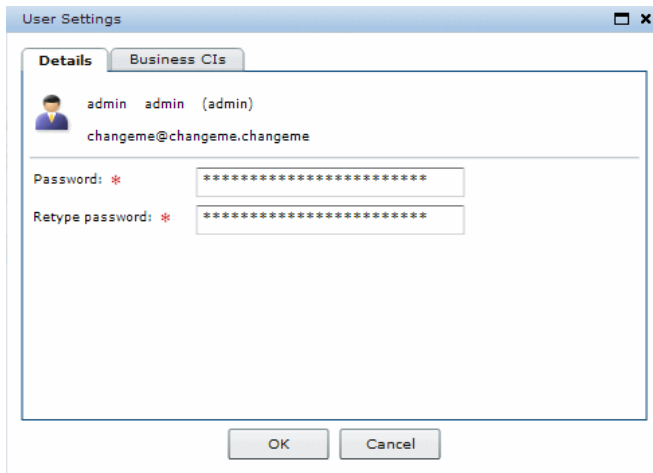
- Viewing and Configuring Current User Properties on page 22
- Associating Business CIs with the Current User on page 24

Viewing and Configuring Current User Properties

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

To view and configure user properties for the current user:

- 1 Select **Preferences > User Settings** from the HP Release Control menu. The User Settings dialog box opens to the **Details** tab.

The image shows a screenshot of the 'User Settings' dialog box with the 'Details' tab selected. The dialog box has a title bar with 'User Settings' and standard window controls. Inside, there are two tabs: 'Details' (active) and 'Business CIs'. Under the 'Details' tab, there is a user profile section showing a user icon, the name 'admin admin (admin)', and the email 'changeme@changeme.changeme'. Below this, there are two password fields: 'Password: *' and 'Retype password: *', both containing masked characters. At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

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

- First name
- Last name
- User name with which the user logs in to HP Release Control (in parentheses)
- Email address

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

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

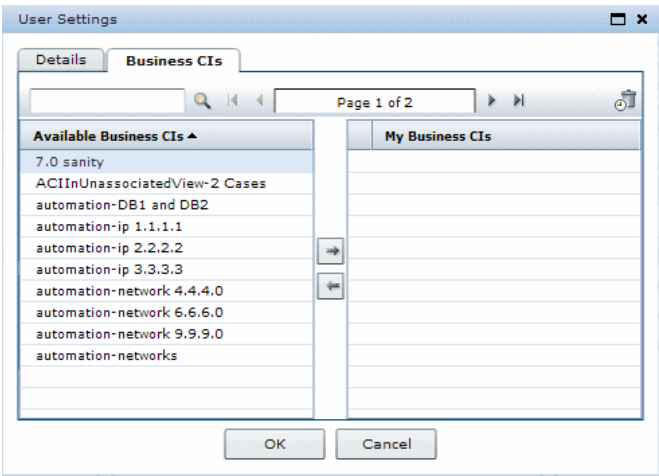
- 3** Click **OK** to save the modified user properties and close the User Settings dialog box.

Associating Business CIs with the Current User

Associating a business CI with a user causes the user to receive notifications when a change is scheduled which will impact the business CI. Although the administrator is responsible for the initial association of business CIs with users, it is possible to associate business CIs or remove business CI associations with the current user. For more details on user administration, refer to the *HP Release Control Installation and Configuration Guide*.

To associate business CIs with the current user:

- 1 Select **Preferences > User Settings** from the HP Release Control menu. The User Settings dialog box opens.
- 2 Click the **Business CIs** tab. The available business CIs are displayed in the **Available Business CIs** list and the business CIs already associated with the current user are displayed in the **My Business CIs** list.



To view obsolete business CIs, click the **Show Obsolete** button.

- 3 In the **Available Business CIs** list, select the business CIs you want to associate with the current 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.





- 4** Click the top arrow to move the business CIs to the **My Business CIs** list.



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

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

3

Filtering Change Requests, Activities, and Action Items

This chapter describes how to filter change requests and action items in the Analysis module and activities in the Director module.

This chapter includes:

- About Using Filters on page 27
- Defining a Change Request or Activity Filter on page 31
- Filter Criteria for Activities and Change Requests on page 34
- Defining an Action Items Filter on page 46
- Managing Filters on page 50

About Using Filters

You can filter change requests and action items in the Analysis module and you can filter activities in the Director module. You can select either a public filter or a filter that you previously defined, or you can define a new filter by selecting **New**.

Regardless of where you create the filter, the same filters will be visible in both the Analysis module and the Director module.

Using Filters in the Analysis Module

You use the filter mechanism at the top of the Analysis module to define a set of criteria by which HP Release Control determines which change requests to display in the Change Requests mode or which action items to display in the Action Items mode.

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



- Search for a specific change request by entering the request's ID number in the search box at the top right corner of the page and clicking the **Find** button. For a list of regular expressions that can be used, see "Regular Expressions" on page 30.
- Select a change request filter. HP Release Control displays the change requests that meet the criteria of the change request filter you selected.
- Select an action item filter. HP Release Control displays the change requests that are associated with the action items that meet the criteria of the action item filter you selected.
- Select both a change request filter and an action item filter. HP Release Control displays the change requests that meet the criteria of the change request filter you selected and are associated with the action items that meet the criteria of the action item filter you selected. For example, if you want to view all high risk change requests that have open action items associated with them, you would select both a change request filter that includes only high risk change requests and an action item filter that includes only open action items.

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



- Search for a specific action item by entering the action item's ID number in the search box at the top right corner of the page and clicking the **Find** button. For a list of regular expressions that can be used, see “Regular Expressions” on page 30.
- Select an action item filter. HP Release Control displays the action items that meet the criteria of the action item filter you selected.
- Select a change request filter. HP Release Control displays the action items that are associated with the change requests that meet the criteria of the change request filter you selected.
- Select both an action item filter and a change request filter. HP Release Control displays the action items that meet the criteria of the action item filter you selected and are associated with the change requests that meet the criteria of the change request filter you selected. For example, if you want to view all action items assigned to you that are associated with high priority change requests, you would select both an action item filter that includes only action items assigned to you and a change request filter that includes only high priority change requests.

Note:



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

Using Filters in the Director Module

You use the filter mechanism at the top of the Director module to define a set of criteria by which HP Release Control determines which activities to display in the Director module.

The filter mechanism in the Director module works in the same way as the filter mechanism in the Analysis module and you can use filters created in the Analysis module to filter activities in the Director module. However, some of the filter criteria that are only relevant to the Analysis module are not included in the Director module and vice versa.

For example, time-related criteria, which are only relevant to the Analysis module are not included in Director module. If a filter was created in the Analysis module with time-related criteria, the filter can still be used in the Director module. However, you will not be able to edit time-related criteria in the Director module.

Regular Expressions

In certain filter and search fields, you can use regular expressions to refine your search or filter. In these fields, you can use the following regular expressions:

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

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

Defining a Change Request or Activity Filter

This section describes how to create a new change request or activity filter. In the Analysis module, you can create a new change request filter in either the Change Requests or Action Items mode. You can also create a new filter in the Director module.

To define a new filter:

- 1 Open the Filter dialog box.
 - **If you are in the Analysis module:** In the **Change Requests** list, select **New**. The Change Request Filter dialog box opens.
 - **If you are in the Director module:** In the **Activities** list, select **New**. The Activity Filter dialog box opens.
- 2 Click the tab representing the relevant filter category (for example, **General**) and select one or more of the filter criteria described in the section “Filter Criteria for Activities and Change Requests” on page 34.

The screenshot shows a dialog box titled "Change Request Filter: Unsaved Filter". It has a toolbar with a home icon, a document icon, and a "View" button. Below the toolbar are several tabs: "General", "Analysis Data", "Business CIs", "Time", "Review", and "Union Filters". The "General" tab is active, displaying a list of filter criteria on the left and their corresponding values in dropdown menus on the right. The criteria and their values are: "Hierarchy level" (checked, "Change"), "Change type" (unchecked, "Planned"), "Service desk" (unchecked, "ServiceCenter"), "Priority" (checked, "Low"), "Status" (unchecked, "Assigned"), "Estimated risk" (unchecked, "Very Low"), "Contact person" (unchecked, empty text box), and "Implementors" (unchecked, empty text box with a save icon). Each dropdown menu has a downward arrow on the right side.

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

- 3** To combine the results of the filter you are defining with other pre-existing filters, click the **Union Filters** tab and select one or more filters. For more information on union filters, see “Union Filters Tab” on page 44.



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



- 4** Click **Save** to save your filter settings.
- a** In the Save Filter dialog box, enter a name and description for the new filter you are creating.
 - b** If you are assigned the Administrator or Change Manager role, you can select the **Public Filter** check box to enable the filter you are creating to be viewed by all users.
 - c** If you are an administrator and want to be able to define a time period category based on the filter you are creating, select the **Time Period Filter** check box. The filter will then appear in the Select Filter dialog box and you can select this filter when defining a time period category in the Administration module’s Time Periods tab. For details on defining time periods, refer to the *HP Release Control Installation and Configuration Guide*.

Note: The **Time period filter** check box cannot be selected in the following cases:

- If the **Abnormal due to** option is selected in the Analysis Data tab
 - If the **Requests affecting my business CI** option is selected in the business CIs tab
 - If options other than **Before**, **After**, or **Between** are selected in the Time tab
-



d To view filter results without saving the filter, click the **View Filtered Results** button.

e Click **Save & Execute** to save the filter and display the filter results. If the saved filter is a time period filter and is included in time period categories, HP Release Control recalculates the compliance of the change requests that fit the configured categories with the rules pertaining to these categories.

Once you have saved the filter, it appears in one of the following categories in the filter selection box:

- **My Filters**
- **Public Filters** (if the **Public filter** check box was selected)
- **Time Period Filters** (if the **Time Period Filter** check box was selected)

Filter Criteria for Activities and Change Requests

Important: This section refers to filtering change requests. The same information applies to filtering activities in the Director module.

You filter change requests according to different criteria. These criteria are divided into predefined filter categories. You can also combine the results of the current filter with other pre-existing filters in the **Union Filters** tab.

Notes:

- The HP Release Control administrator can remove some of the pre-defined filter criteria. Some of the criteria listed in the tables below, therefore, may not be available.
- The HP Release Control administrator can create additional customized filters, in which case additional filter categories are available in the Change Request Filter dialog box. For details on creating customized filters, refer to the *HP Release Control Installation and Configuration Guide*.
- Some filter criteria may be included in one module and not in another. If a filter was created in one module with criteria that are only relevant to that module, the filter can still be used in the other module but with some limitations.

For example, time-related criteria, which are only relevant to the Analysis module are not included in Director module. If a filter was created in the Analysis module with time-related criteria, the filter can still be used in the Director module. However, you will not be able to edit time-related criteria in the Director module.

This section includes:


- “General Tab” on page 36
- “Analysis Data Tab” on page 39
- “Business CIs Tab” on page 41
- “Time Tab” on page 42
- “Review Tab” on page 43
- “Union Filters Tab” on page 44

General Tab

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


Filter By:	Description
Hierarchy level	<p>Filters change requests according to their hierarchical structure. The following options are available:</p> <ul style="list-style-type: none">➤ Change. Displays only top-level change requests.➤ Task. Displays only second-level change requests.➤ Changes and Independent Tasks. Displays all changes and those tasks that are not part of a parent change. <p>If you do not filter change requests by this criterion, all changes and tasks, including tasks that are part of a parent change, are displayed on one level and not in a hierarchical structure.</p> <p>Note: The names of the top-level and second-level change requests can be configured in the enumeration-labels.properties file. For more information, refer to the <i>HP Release Control Installation and Configuration Guide</i>.</p> <p>In addition, if you modify the names of the top-level and second-level requests, you should modify the filters.constraints.hierarchy.@@CHANGES_AND_ORPHANS_TASKS@@ resource in the <HP Release Control installation directory>\tomcat\webapps\ccm\WEB-INF\classes\onyxClientResources.properties file accordingly, so that the last option in this selection box does not read Changes and Independent Tasks.</p>

Filter By:	Description
Change type	<p>Filters change requests according to their request type. The following options are available:</p> <ul style="list-style-type: none"> ► Planned. Displays regular change requests scheduled in HP Release Control. ► Latent. (available if the latent change feature is configured). Displays change requests detected by HP Universal CMDB. For more information see “Viewing Detected and Latent Changes” on page 167. ► Surrogate. Displays change requests automatically created by HP Release Control to represent a change request existing in the service desk application that has not yet been retrieved by HP Release Control. ► Automated. Displays changes that originate from HP Network Automation or HP Server Automation.
Detection status (Analysis module only. Available if the latent change feature is configured)	<p>Filters change requests according to the way in which they were detected. The following options are available:</p> <ul style="list-style-type: none"> ► Not detected. Displays regular change requests scheduled in HP Release Control. ► Detected. Displays latent changes, or change requests that contain detected changes. For more information, see “Viewing Detected and Latent Changes” on page 167.
Category	Filters change requests according to category.
Subcategory	Filters change requests according to subcategory.
Service desk	Filters change requests according to the service desk applications from which they originated. You can select one or more of the listed service desk applications.
Priority	Filters change requests according to their priority levels. You can select one or more of the listed priority levels. The priority levels are determined in the service desk application.
Emergency	<p>Filters change requests as follows:</p> <ul style="list-style-type: none"> ► True. Change requests that were handled in an emergency procedure. ► False. Change requests that were not handled in an emergency procedure.

Filter By:	Description
Status	Filters change requests according to their statuses. You can select one or more of the listed statuses. The status is determined in the service desk application.
Contact person	Filters change requests according to the contact people responsible for the requests. For a list of the regular expressions that can be used, see “Regular Expressions” on page 30.
Implementors	Filters change requests according to their implementors. To select an implementor, you can either type the name of the implementor in the box or you can click the Select From List  button and select an implementor from the dialog box that opens. For a list of the regular expressions that can be used, see “Regular Expressions” on page 30.

Analysis Data Tab

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

Filter By:	Description
Calculated risk	<p>Filters change requests according to their risk analysis levels. The risk analysis level is a number from 0-100 that indicates the risk level of this change request relative to the other change requests. A higher number indicates a higher risk level.</p> <p>Enter or select a range using the boxes provided.</p> <p>For more information about the calculation of risk levels, see “Viewing Change Request Risk Analysis” on page 125.</p>
CIs	<p>Filters change requests according to the CIs affected by each change request based on the impact analysis calculation. To select CIs, you can either type the names of the CIs in the box or you can click the Select Values  button to open the Select Values dialog box.</p> <p>For a list of the regular expressions that can be used, see “Regular Expressions” on page 30.</p> <p>To select CIs using the Select Values dialog box, select the relevant CIs in the Available Values list, double-click them or click the top arrow to move them to the Selected Values list and click OK. To deselect a CI, select the CI in the Selected Values list and click the bottom arrow.</p> <p>Note: If you use the NOT regular expression, the filter will exclude all change requests that contain only the specified CI and no other CIs. However, if a change request also includes other CIs besides the one you specified, that change request will still be displayed in the results.</p>
Collision type (Analysis module only)	<p>Filters change requests according to the types or causes of the collisions. You can select one or more of the listed collision causes. For more information about collision causes, see “Understanding Change Request Collisions” on page 109.</p> <p>Note: If you defined a custom collision cause, you can select the name of the field you specified as a collision cause.</p>

Filter By:	Description
Collision severity	<p>Filters change requests according to their collision severity levels. You can select one or more of the listed collision severity levels.</p> <p>Collision severity is calculated by HP Release Control. For more information about collision severity, see “Viewing Change Request Collisions” on page 109.</p>
Impact severity	<p>Filters change requests according to their impact severity levels. You can select one or more of the listed impact severity levels.</p> <p>Impact severity is calculated by HP Release Control. For more information about impact severity, see “Viewing Impact Analysis Results” on page 105.</p>
Abnormal due to (Analysis module only)	<p>Filters change requests according to the time period categories whose recurrence rules the requests breach. You can select one or more of the listed time period categories. For more information on time period categories, refer to the <i>HP Release Control Installation and Configuration Guide</i>.</p> <p>Note: When you view the filtered change requests in the Timeline and Calendar views, the time period categories you selected in the Change Requests Filter are automatically displayed.</p>
Voted as (Analysis module only)	<p>Filters change requests according to the user votes they received. You can select one or more of the listed voting options.</p> <p>Users can express their opinion about a change request by posting a vote (Disagree, To CAB, Agree, No vote) regarding the request. For more information on change request voting, see “Viewing and Adding Discussion Threads and Comments” on page 153.</p>
Discussion created (Analysis module only)	<p>Filters change requests according to the time at which request discussion threads and comments were added.</p>

Business CIs Tab

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

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

To select business CIs to be included in the filter:

- 1 Select **Requests affecting selected business CIs**.
- 2 In the **Available Business CIs** list, select the business CIs you want to include in the filter. If the list of available business CIs is lengthy, you can use the filter box to display only those business CIs that match the text you enter in the filter 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.



- 3 Double-click the selected business CIs or click the top arrow to move the selected business CIs to the **Selected Business CIs** list.

To deselect a business CI, select the business CI in the **Selected Business CIs** list and click the bottom arrow.



To view obsolete business CIs, click the **Show Obsolete** button.

Time Tab

This category is only available in the Analysis module.

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

Filter By:	Description
Planned start	Filters change requests according to their planned execution start time.
Planned end	Filters change requests according to their planned execution end time.
Actual start	Filters change requests according to their actual execution start time.
Actual end	Filters change requests according to their actual execution end time.
Created	Filters change requests according to the time at which they were created.
Last update	Filters change requests according to the time at which they were last updated.
Requested end date	Filters change requests according to the date by which the implementation of the change request must be completed.
Scheduled downtime start	Filters change requests according to when their downtime is scheduled to start.
Scheduled downtime end	Filters change requests according to when their downtime is scheduled to end.
Implemented within	Filters change requests according to the time range in which they were implemented. Any part of the actual implementation that falls within this time range is included in the filter.
Planned within	Filters change requests according to the time range in which they were scheduled to take place. Any part of the planned execution that falls within this time range is included in the filter.

To select filter criteria in the Time tab:

- 1** In the **Time** tab, select one or more of the filter criteria.
- 2** From the box adjacent to each filter criterion that you selected, select the desired option from the dropdown list.



- If you selected **After**, **Before**, or **Between**, click the calendar button and select a date and time.
- If you selected **Last** or **Next**, select the desired time range from the dropdown lists that follow.

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

Review Tab

By default, this category only appears in the Analysis module.

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

Filter By:	Description
Reviewed	<p>Filters change requests according to the time at which they were reviewed.</p> <p>You define the review time interval by choosing the desired option from the selection box dropdown list. If you select After, Before, or Between, click the calendar button to open the calendar box, select a month using the left and right arrows next to the month name, select a date from the calendar, enter or select an exact hour in the time box, and click OK.</p> <p>Note: You select the time interval according to your machine's time zone, as indicated in the calendar box.</p>
Outcome	<p>Filters change requests according to the outcomes they have been assigned by change reviewers. You can select one or more of the listed outcomes.</p>

Filter By:	Description
Customer satisfaction	Filters change requests according to the customer satisfaction rating they were assigned by change reviewers. You can select one or more of the listed ratings.
Planning satisfaction	Filters change requests according to the planning satisfaction rating they were assigned by change reviewers. You can select one or more of the listed ratings.
Disrupted Business CIs	Filters change requests according to the business CIs that were negatively affected by their implementation. You can select one or more business CIs (using the CTRL key) from the Available Business CIs list and click the top arrow to move the selected business CIs to the Selected Business CIs list.

Union Filters Tab

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

For example, if your next Change Advisory Board meeting will discuss change requests scheduled to be executed during the first week in September 2008 that are high risk, collide critically with other requests, or have been voted on prior to the CAB, you would:

- Define a filter called **Next CAB Meeting** and select the first week in September under **Planned** in the **Time** tab.
- Select the **Critical collisions**, **High risk**, and **Voted to CAB** filters that were previously defined in HP Release Control in the **Union Filters** tab.

When you select the **Next CAB Meeting** filter, HP Release Control displays all the change requests that are scheduled for the first week in September 2008 and meet any one of the following criteria:

- Risk = high
- Collision severity = critical
- Contain votes to CAB

To select a union filter:

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

Note:

- The Favorites filter and filters containing union filters do not appear in the Available Filters list and therefore cannot be combined as union filters with the current filter you are defining.
 - If you selected to combine private filters with the filter you are currently defining, you can save the current filter only as a private filter.
 - You cannot combine filters that were defined by an administrator as time period filters with filters that were not defined as time period filters.
-

Defining an Action Items Filter

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

To define a new action items filter:

- 1 In the **Action Items** list, select **New**. The Action Items Filter dialog box opens.

- 2 Click the tab representing the relevant filter category, either **General** or **Time**, and select one or more of the filter criteria described in the section “Filter Criteria for Action Items” on page 48.

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



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



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

- a** In the Save Filter dialog box, enter a name and description for the new filter you are creating.
- b** If you are an administrator, you can select the **Public filter** check box to enable the filter you are creating to be viewed by all users.
- c** Click **Save & Execute** to save the filter and display the filter results in the Action Items pane.

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






Note: To view filter results without saving the filter, click the **View Filtered Results** button.

Filter Criteria for Action Items

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

General Tab

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


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

Time

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

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

To select filter criteria in the **Time** tab:

- 1 In the **Time** tab, select one or both of the filter criteria.
- 2 From the box to the right of the filter criteria that you selected, select the desired option from the dropdown list.
- 3  If you selected **After**, **Before**, or **Between**, click the calendar button to open the calendar box.
- 4 In the calendar box, select a month using the left and right arrows next to the month name, select a date from the calendar, and enter or select an exact hour in the time box. Click **OK**.

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

Managing Filters

This section describes how to modify, delete, or copy a filter. The information in this section applies to change request filters, activity filters, and action item filters.


Modifying a Filter

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

Note:

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

To modify the properties of a filter:

- 1** In the filter selection box, select the filter whose properties you want to modify.
- 2** After the filter is applied, reopen the filter selection box and select **Edit**.
- 3** Modify the filter properties as required in the filter dialog box. For details on modifying a change request or activity filter, see “Defining a Change Request or Activity Filter” on page 31. For details on modifying an action items filter, see “Defining an Action Items Filter” on page 46.
-  **4** Click **Save** to open the Save Filter dialog box. For details on the fields in this dialog box, see step 4 on page 32 if you are copying a change request or activity filter, and step 3 on page 47 if you are copying an action item filter.
- 5** Click **Save & Execute** to save the modified filter and display the new filter results.

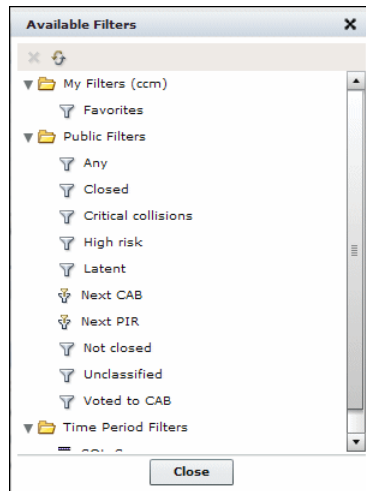
Note: If the modified filter is a time period filter and is included in time period categories, HP Release Control recalculates the compliance of the change requests that fit the configured categories with the rules pertaining to these categories.

Deleting a Filter

You can delete any filter that you created, unless it is a time period filter that has been used in defining a time period category, or a filter that is being used as a union filter within another filter. If you are an administrator, you can delete any public filter except the **Any** filter. The automatically generated **Favorites** filter cannot be deleted.

To delete a filter:

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



- 2 Select the filter that you want to delete and click the **Delete** button.
- 3 Click **Yes** in the deletion confirmation dialog box.



Note: You can refresh the list of filters displayed in the Available Filters dialog box by clicking the **Refresh** button.

Copying a Filter

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

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

To copy a filter:

- 1** In the filter selection box, select the filter you want to copy.
- 2** After the filter is applied, reopen the filter selection box and select **Save as**. The Save Filter dialog box opens.

For details on the fields in this dialog box, see step 4 on page 32 if you are copying a change request or activity filter, and step 3 on page 47 if you are copying an action item filter.

- 3** Click **Save & Execute**. The copy of the original filter appears in the selection box.

Part II

Analyzing Changes

4

The Analysis Module at a Glance

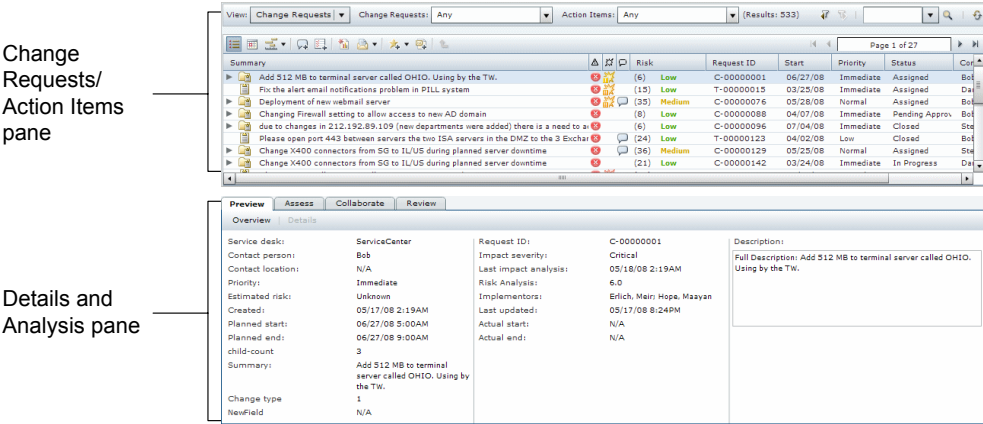
This chapter introduces the key elements in the Analysis module.

This chapter includes:

- Understanding the Analysis Module on page 56
- Working with the Change Requests Toolbar on page 59
- Working with the Action Items Toolbar on page 61
- Configuring Preferences for the Analysis Module on page 64

Understanding the Analysis Module

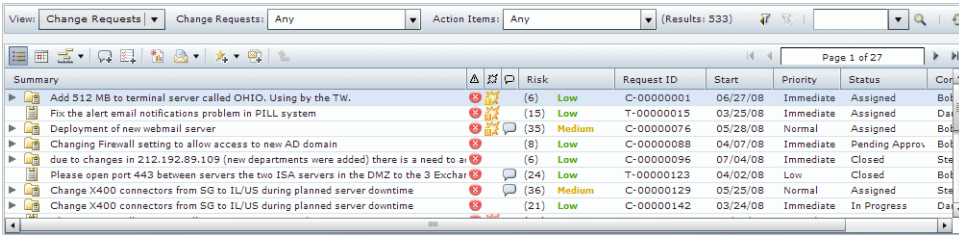
The Analysis module is divided horizontally into two panes. The upper pane displays a list of change requests or action items, depending on the mode that you select. The lower pane displays change request details and analysis information.



Change Requests/Action Items Pane

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

- **Change Requests mode.** Displays change requests that have been processed by HP Release Control. You can analyze the change requests from a number of different perspectives by selecting one of the following available views: **List**, **Calendar**, or **Timeline** (grouped by **Change Request**, **Business**, or **Implementor**).

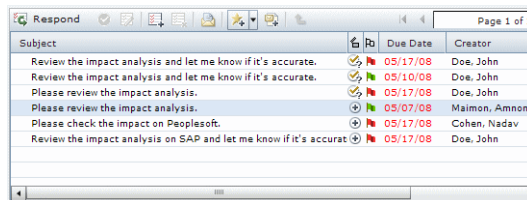


For detailed information on each of these views, see Chapter 5, “Viewing Change Requests in List and Calendar Views,” and Chapter 6, “Working with the Timeline Views.”

For information on using the filter mechanism to display only those change requests that meet certain criteria, see Chapter 3, “Filtering Change Requests, Activities, and Action Items.”

For an explanation of the Change Requests mode toolbar, see “Working with the Change Requests Toolbar” on page 59.

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



Subject	Due Date	Creator
Review the impact analysis and let me know if it's accurate.	05/17/08	Doe, John
Review the impact analysis and let me know if it's accurate.	05/10/08	Doe, John
Please review the impact analysis.	05/17/08	Doe, John
Please review the impact analysis.	05/07/08	Maimon, Amnon
Please check the impact on Peoplesoft.	05/17/08	Cohen, Nadav
Review the impact analysis on SAP and let me know if it's accurate.	05/17/08	Doe, John

For detailed information on the Action Items mode, see Chapter 7, “Working in the Action Items Mode.”

For information on using the filter mechanism to display only those action items that meet certain criteria, see Chapter 3, “Filtering Change Requests, Activities, and Action Items.”

For an explanation of the Action Items mode toolbar, see “Working with the Action Items Toolbar” on page 61.

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



Details and Analysis Pane

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






The Details and Analysis pane contains the following tabs:








- **Preview.** Provides a general **Overview** of the information pertaining to the selected or associated change request, and the change request **Details** that originate from the service desk application.
- **Assess.** Displays the following analysis data for the selected or associated change request:
 - **Impact.** Displays the configuration items (CIs) and business CIs that will be affected by the change request. For detailed information, see Chapter 9, “Viewing Impact Analysis Results.”
 - **Collisions.** Displays the change requests that collide with the selected or associated change request. For detailed information, see Chapter 10, “Viewing Change Request Collisions.”
 - **Risk.** Displays the Risk analysis using both numerical and graphical data. For detailed information, see Chapter 11, “Viewing Change Request Risk Analysis.”
 - **Similar Changes.** Displays a list of change requests that are similar to the selected or associated change request, as well as pie charts demonstrating the statistics of the similar requests. For detailed information, see Chapter 12, “Similar Changes.”
 - **Detected Changes.** (available only if the latent change feature is configured). Displays all the detected changes that match the selected or associated change request. For detailed information, see Chapter 16, “Viewing Detected and Latent Changes.”





- **Collaborate.** Displays the **Discussion** threads pertaining to the selected or associated change request, and the **Action Items** associated with the request. In addition, you can use the **Resolution** view in this tab to participate in CAB discussions, or to approve or retract a request, depending on the status of the request, if you have been granted Approver status in HP Release Control. For detailed information, see Chapter 14, “Working with Change Request Collaboration.”
- **Review.** Displays the outcome of the selected or associated change request following the implementation of the request, the comments entered by the change reviewer, and a list of business CIs that were negatively affected by the implementation of the request. For detailed information, see Chapter 15, “Reviewing Changes.”

Working with the Change Requests Toolbar

The Change Requests mode toolbar contains the following buttons:



Icon	Name	Description
	List	Displays the Change Requests in a list format.
	Calendar	Displays the Change Request in a calendar format.
	Timeline: Group by Change Request	Displays the Change Request in a timeline format.
	Change Planner	Opens the Change Planner. The Change Planner enables you to simulate the effects of modifying the details of a change request and to view how these modifications will influence the analysis data. For more information, see “Change Planner” on page 141.
	New Discussion Thread	Opens the New Discussion Thread dialog box, which is used to add a new thread to the discussion in the Collaborate tab’s Discussion view. For more information, see “Viewing and Adding Discussion Threads and Comments” on page 153.






Icon	Name	Description
	New Action Item	Opens the Add Action Item dialog box, which is used to create an action item associated with the request. For more information, see “Creating an Action Item” on page 95.
	Generate Report	Opens the Report Details dialog box, which is used to generate a PDF, an HTML report, or an Excel report. For more information, see “Generating Reports in the List and Calendar Views” on page 78. Appears only in the List and Calendar views.
	Send Email	Used to send discussion threads by email in the Collaborate tab Discussion view. For more information, see “Viewing and Adding Discussion Threads and Comments” on page 153. Also used to send Post Implementation Review invitations and minutes to the CAB. For more information, see “Reviewing Changes” on page 161.
	Add Selected Request to Favorites/ Remove Selected Request from Favorites	Used to add or remove the selected change request from a predefined filter of favorite change requests and action items. You can also subscribe to receive notifications when certain modifications are made to favorite items and requests. For details, see “Configuring Preferences for the Analysis Module” on page 64.
	Subscribe to Selected Request/ Unsubscribe from Selected Request	Used to receive email notifications or cancel a notification subscription for the selected change request. For information on configuring notification rules and conditions, refer to the <i>HP Release Control Installation and Configuration Guide</i> .
	Go to Parent Request	Displays the parent change request for the selected child change request (task). Appears only in the List view.
	Zoom In/ Zoom Out	Used to open a time range selection box where you select a focus time range. Appears only in the Timeline view.






Icon	Name	Description
	Select Time Period	Used to select the configured time periods to display in the background of the Timeline and Calendar views. Does not appear in the List view.
	Previous and Next arrows	Used to navigate between pages of change requests.
	First and Last Page arrows	Used to jump to the first or last page of change requests.
	Page box	Used to jump to a specific page of change requests. You do so by highlighting the text in the Page box, typing the page number, and pressing ENTER. If you type a page that is not within the available page range, the Page box is outlined in red and you are required to retype a page number that falls within the correct range.

Working with the Action Items Toolbar

The Action Items mode toolbar contains the following buttons:

Icon	Name	Description
	Respond	Opens the Respond dialog box, which enables the following: <ul style="list-style-type: none"> ➤ any user to post comments ➤ the assignee to mark an open action item as Done or return the item to its creator ➤ the creator to reopen an action item marked as Done For more information, see “Working with Action Items” on page 95.
	Close Action Item	Enables the creator to change the status of the action item to Closed .

Icon	Name	Description
	Edit Action Item	Opens the Edit Action Item dialog box, enabling the creator to edit an open action item. For more information, see “Editing an Action Item” on page 97.
	New Action Item	Opens the Add Action Item dialog box, which is used to create a new action item associated with the same change request as the selected action item. For more information, see “Creating an Action Item” on page 95.
	Delete Action Item	Enables the creator to delete an action item. To delete an action item, select the item and click the Delete Action Item button. Click Yes in the deletion confirmation dialog box.
	Forward by Email (FYI)	Used to send an action item by email, for information purposes. To send an action item by email, select the action item that you want to send and click the Send EMail button. In the Send Email dialog box, enter the email address of each recipient of the email, enter any additional comments you have on the action item, and click the Send button.
	Add Selected Action Item to Favorites/ Remove Selected Action Item from Favorites	Used to add or remove the selected action item from a predefined filter of favorite action items and change requests. You can also subscribe to receive notifications when certain modifications are made to favorite items and requests. For details, see “Configuring Preferences for the Analysis Module” on page 64.

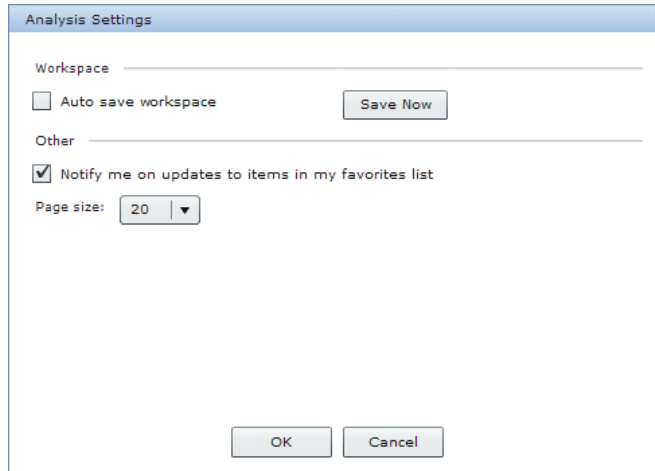
Icon	Name	Description
	Subscribe to Selected Action Item/ Unsubscribe from Selected Action Item	Used to receive email notifications or cancel a notification subscription for the selected action item. For information on configuring notification rules and conditions, refer to the <i>HP Release Control Installation and Configuration Guide</i> .
	Go to Parent Action Item	Displays the parent action item for the selected derived action item.
	Previous and Next arrows	Used to navigate between pages of action items.
	First and Last Page arrows	Used to jump to the first or last page of action items.
	Page box	Used to jump to a specific page of action items. You do so by highlighting the text in the Page box, typing the page number, and pressing ENTER. If you type a page that is not within the available page range, the Page box is outlined in red and you are required to retype a page number that falls within the correct range.

Configuring Preferences for the Analysis Module

You can configure display, autosave, and notification preferences using the Analysis Settings dialog box.

To configure preferences for the Analysis module:

- 1 Select **Preferences > Analysis Settings**. The Analysis Settings dialog box opens.



- 2 Under **Workspace**, you can choose one or both of the following options:
 - **Auto save workspace.** HP Release Control saves your Change Analysis module settings every two minutes. The next time you log in to HP Release Control, the last saved Change Analysis module settings are displayed.
 - **Save Now.** HP Release Control saves your current Change Analysis module settings immediately.
- 3 Under **Other**, you can select **Notify me on updates to items in my Favorites list** to receive email notifications in the following cases:
 - if there was a change in the status of an action item marked as a favorite item
 - if a derived action item was created from an action item marked as a favorite item

- if someone commented on a change request marked as a favorite item
 - if a change request marked as a favorite item was approved or retracted
 - if an action item was created for a change request marked as a favorite item
- 4** To modify the number of change requests or action items displayed by default per page of the Analysis module's Change Requests or Action Items pane, select **10, 30, 40, or 50** from the **Page size** box. By default, 20 change requests/action items are displayed on each page.
- 5** Click **OK** to save your preference settings and close the Analysis Settings dialog box.

5

Viewing Change Requests in List and Calendar Views

This chapter describes the List and Calendar views of the Analysis module's Change Requests mode, which displays the change requests that have been processed by HP Release Control.

This chapter includes:

- Viewing Change Requests in the List View on page 68
- Viewing Change Requests in the Calendar View on page 73
- Generating Reports in the List and Calendar Views on page 78

Note: You can filter the change requests displayed in the Change Requests mode. For more information, see Chapter 3, “Filtering Change Requests, Activities, and Action Items.”

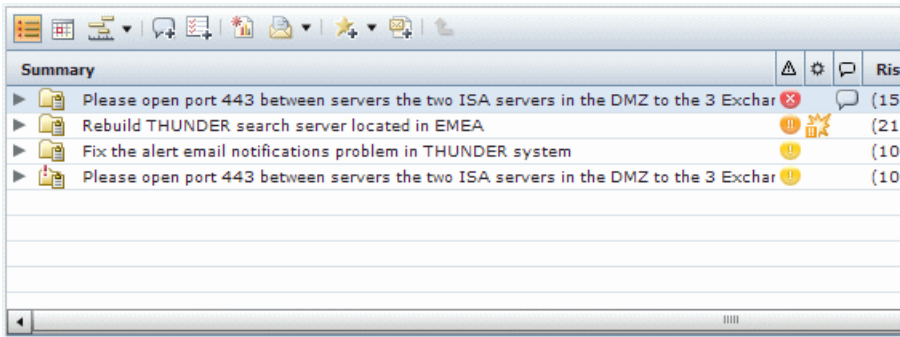
By default, HP Release Control displays all the change requests in the system. When a filter is in place, it filters the change requests in all of the different views.

Viewing Change Requests in the List View

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



You open the list view by clicking on the **List** button.



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


















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

Note: By default, the List view displays data for 20 change requests. To reconfigure this number, see “Configuring Preferences for the Analysis Module” on page 64.

List View Columns

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

Column	Description
Summary	<p>Displays a brief overview of the change request.</p> <p>The icon next to the overview sentence indicates the following:</p> <ul style="list-style-type: none"> ► the type of change request—that is, one of the following: <ul style="list-style-type: none">  level 1 (by default, change)  level 2 (by default, task)  latent. Indicates that the change request was detected by HP Release Control. <p>A tooltip indicating the request type is visible when you hold the mouse pointer over this icon.</p> <ul style="list-style-type: none"> ► whether the request is scheduled to take place outside a Changes Allowed period or within a Changes Not Allowed period pertaining to the request. If so, a red exclamation point is included in the icon . A tooltip indicating that the change or task is abnormal and listing the time period category with whose rules the request does not comply is visible when you hold the mouse pointer over this icon. <p>Note: The HP Release Control administrator configures time period categories and rules that apply to these categories. The administrator can also configure the names of the change request types to reflect the terminology used in your integrated service desk application. For more information, refer to the <i>HP Release Control Installation and Configuration Guide</i>.</p>
Impact Severity	<p>Displays an icon indicating the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the request.</p>

Column	Description
Impact Severity (cont'd)	<p>Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels:</p> <ul style="list-style-type: none"> Critical High Medium Low Very low No impact analysis available <p>A tooltip indicating the impact severity level of the change request is visible when you hold the mouse pointer over the severity level icon.</p> <p>For more information about impact analysis and how impact severity is calculated, see Chapter 9, “Viewing Impact Analysis Results.”</p>
Collision Severity	<p>Displays an icon indicating the collision severity level of the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed.</p> <p>Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels:</p> <ul style="list-style-type: none"> Critical High Medium Low Very Low <p>If there are no collisions with the change request, no collision severity icon is displayed.</p>

Column	Description
Collision Severity (cont'd)	<p>A tooltip indicating the severity level of the collision is visible when you hold the mouse pointer over the collision severity icon.</p> <p>For more information about collisions and how collision severity is calculated, see Chapter 10, “Viewing Change Request Collisions.”</p>
User Discussion Threads & Posts	<p>The presence of a user discussion threads & posts icon indicates that user discussion threads and comments to these threads exist in response to the selected change request. A tooltip indicating how many discussion threads and comments exist is visible when you hold the mouse pointer over this icon.</p> <p>You can view the discussion threads themselves in the Collaboration tab's Discussion view. For more information, see “Viewing and Adding Discussion Threads and Comments” on page 153.</p>
Risk	<p>Displays a number from 0-100 that indicates the risk level of the selected change request relative to the other change requests. A higher number indicates a higher risk level.</p> <p>Next to the number is a risk level (low, medium, or high). These levels can be manually configured to correspond to different numeric risk levels.</p> <p>HP Release Control calculates this figure based on risk factors that are subjectively weighted by the HP Release Control administrator during the configuration process. For more information about how the risk level is calculated, see Chapter 11, “Viewing Change Request Risk Analysis.”</p>
Request ID	Displays the reference ID number of the change request in the service desk application.
Start	Displays the date on which the change request is scheduled to begin.

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

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

Viewing Change Requests in the Calendar View

The Change Requests mode's Calendar view displays the change requests planned for each calendar day.



You open the list view by clicking on the **Calendar** button.

A single page displays one calendar week. Each column represents a calendar day and each cell represents a single change request. Change requests appear in ascending order according to their scheduled start times.

Mon, 22 Sep	Tue, 23 Sep	Wed, 24 Sep	Thu, 25 Sep	Fri, 26 Sep	Sat, 27 Sep	Sun, 28 Sep
C-0..000035 [04:20AM-02:20PM] Activate delete trigger for deleted assets on the IL ftp...	C-0..000143 [12:00AM-11:10AM] SOX Remediation and Validation/n of GCRM Servers	C-0..000330 [12:00AM-07:20PM] due to changes in PICKER (new departments were added) th...	T-0..000138 [12:00AM-04:30AM] Rebuild 212.139.90.27 search server located in EM...	L-0..000012 [12:00AM-02:48AM] Latent change detected on host 1-LAB.	T-0..000231 [12:00AM-11:59PM] Changing Firewall setting to allow access to new AD do...	T-0..000231 [12:00AM-11:59PM] Changing Firewall setting to allow access to new AD do...
C-0..000143 [08:10AM-11:59PM] SOX Remediation and Validation/n of GCRM Servers	C-0..000109 [12:00AM-01:00PM] due to changes in 212.116.86.63 (new departments were add...	C-0..000040 [03:50AM-06:50AM] SOX Remediation and Validation/n of GCRM Servers	L-0..000006 [03:30AM-03:30PM] Latent change detected on host GPERETS-NB.	C-0..000348 [12:00AM-01:00PM] Changing Firewall setting to allow access to new AD do...	L-0..000015 [12:00AM-07:00AM] Latent change detected on host 212.157.73.124.	C-0..000107 [08:40AM-11:59PM] 212.157.74.91 is the terminal server of the TW gr...
C-0..000109 [01:00PM-11:59PM] due to changes in 212.116.86.63 (new departments were add...	L-0..000010 [12:00AM-01:50AM] Latent change detected on host 212.122.80.53.	T-0..000138 [10:30PM-11:59PM] Rebuild 212.139.90.27 search server located in EMEA	L-0..000004 [10:22AM-10:22PM] Latent change detected on host 212.131.80.37.	C-0..000100 [03:30AM-06:30AM] Activate delete trigger for deleted assets on the IL ftp...	C-0..000220 [08:40AM-11:40AM] Change X400 connectors from SG to IL/US during pla...	C-0..000228 [11:40PM-11:59PM] Set 212.135.74.91 server to work with US calendar setti...

To display a particular date:

- 1 Click the calendar button on the right side of the toolbar.



- 2 Select the date you want to display. The calendar displays the week around the selected date.
- 3 Alternatively, scroll through the weeks by clicking the left/right arrows.

To display the current date:





- Click the **Now** button.









Notes:






- Change requests with no start or end times, or with start times later than their end times, do not appear in the Calendar view.
 - The Calendar view displays up to one hundred changes per calendar day. When a filter returns more than one hundred change requests per day, the Calendar view displays only the first one hundred. To view all the change requests, either refine the filter or switch to the List or Timeline view.
 - By default, the calendar week begins on Monday and ends on Sunday and the color of each cell header indicates the impact severity level of the change request. To reconfigure these settings, refer to the *HP Release Control Installation and Configuration Guide*.
-

The following icons are displayed in each cell:

Icon	Description
Request type	<p>The request type icon indicates the following:</p> <ul style="list-style-type: none"> ► the type of change request—that is, one of the following: <ul style="list-style-type: none">  level 1 (by default, change)  level 2 (by default, task)  latent. Indicates that the change request was detected by HP Release Control. <p>A tooltip indicating the request type is visible when you hold the mouse pointer over this icon.</p> <ul style="list-style-type: none"> ► whether the request is scheduled to take place outside a Changes Allowed period or within a Changes Not Allowed period pertaining to the request. If so, a red exclamation point is included in the icon . A tooltip indicating that the change or task is abnormal and listing the time period category with whose rules the request does not comply is visible when you hold the mouse pointer over this icon. <p>Note: The HP Release Control administrator configures time period categories and rules that apply to these categories. The administrator can also configure the names of the change request types to reflect the terminology used in your integrated service desk application. For more information, refer to the <i>HP Release Control Installation and Configuration Guide</i>.</p>

Icon	Description
Impact severity	<p>Displays the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the request.</p> <p>Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels:</p> <ul style="list-style-type: none"> Critical High Medium Low Very low No impact analysis available <p>For more information about impact analysis and how impact severity is calculated, see Chapter 9, “Viewing Impact Analysis Results.”</p>

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

Icon	Description
Collision severity	<p>Displays the collision severity level of the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed.</p> <p>Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels:</p> <ul style="list-style-type: none">  Critical  High  Medium  Low  Very Low <p>For more information about collisions and how collision severity is calculated, see Chapter 10, “Viewing Change Request Collisions.”</p>
User Discussion Threads & Posts	<p>The presence of a user discussion threads & posts icon indicates that user discussion threads and comments exist in response to the selected change request. You can view the discussion threads themselves in the Collaboration tab's Discussion view. For more information, see “Viewing and Adding Discussion Threads and Comments” on page 153.</p>



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

Generating Reports in the List and Calendar Views

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

Note: If you are working in an Asian language environment and want to generate PDF reports, you must modify the PDF encoding value (currently defined as CP1250) within the following report template files, located in the <HP Release Control installation directory>\conf\reports.ext directory:

- calendar.changes-report.days-subreport.pdf.jrxml
 - calendar.changes-report.pdf.jrxml
 - calendar.changes-report.tickets-subreport.pdf.jrxml
 - grid.change-single-pager-report.pdf.jrxml
 - grid.changes-report.pdf.jrxml
 - grid.changes-report.tasks-subreport.pdf.jrxml
-

To generate a report:



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

Report Details

Request range: Current filter ▼

Level policy: ☒ Collapsed ☐ Expanded

Request layout: List ▼

Output type: EXCEL ▼

Export Cancel

- 2** In the **Request range** box, select **Selected change request**, **Current page**, or **Current filter**, depending on the data you want to view in the report.
- 3** Under **Level policy**, select **Expanded** if you want to view data for child change requests (tasks). By default, the report will display data for parent change requests (changes) only.
- 4** In the **Request layout** box, choose one of the following options:
 - **One page**. Displays the data for each change request on a separate page.
 - **List**. Displays the data for each change request concisely, in a list format. Several lists are displayed on each page.
- 5** In the **Output type** box, choose whether you want the report to be generated as a PDF, as an HTML page, or as an Excel spreadsheet.
- 6** Click **Export**. HP Release Control generates the report and displays it in a separate browser window.

Note: For information on customizing reports, refer to the section about customizing reports in the *HP Release Control Installation and Configuration Guide*.

6

Working with the Timeline Views

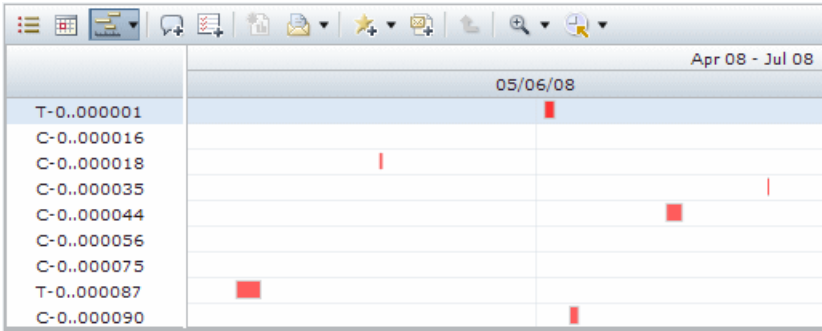
This chapter describes the Timeline views of the Analysis module's Change Requests, which displays the change requests that have been processed by HP Release Control. The Timeline views display the change requests, implementors, and business CIs in the context of their schedules.

This chapter includes:

- The Timeline View at a Glance on page 82
- Viewing Change Requests, Business CIs, and Implementors in the Timeline View on page 83
- Viewing Impact Severity Levels on page 86
- Viewing Time Period-Related Data on page 86

The Timeline View at a Glance

The Change Requests mode’s Timeline view displays data as blocks of time on a timeline. Each entry is displayed on a separate row. The Timeline view resembles a typical Gantt chart, allowing you to view overlapping change requests. To open the Timeline view click the **Timeline** button arrow and select the desired view type. The following is an example of the Timeline view for Change Requests:



When you hold the cursor over different items in the Timeline view, a tooltip appears displaying detailed information about those items. When you click a row entry, details and analysis information are displayed in the Details and Analysis pane.

Viewing Change Requests, Business CIs, and Implementors in the Timeline View



The Timeline view can be used to view change requests, business CIs, and implementors. Entries are displayed on separate rows. To open the Timeline view click the **Timeline** button arrow and choose the required view type.

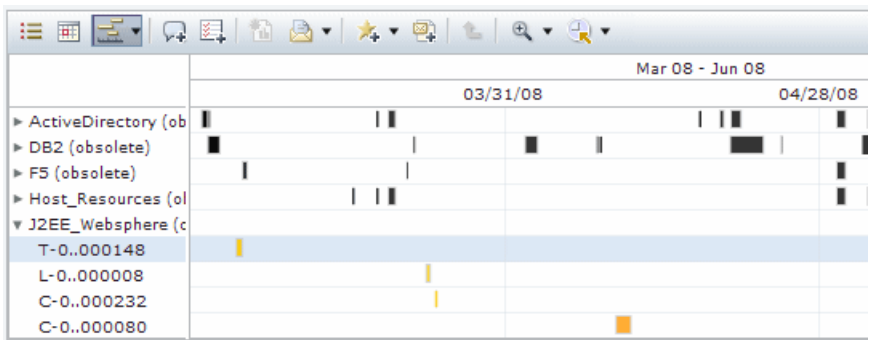
Business CI and Implementor Timeline Views

In the Business CI and Implementor Timeline views each row is dedicated to the change requests for a single business CI or implementor. Change requests that overlap are indicated by a darker shade at the point at which they overlap.

The following is an example of the Business CI Timeline view:



- ▶ You can display all of the change requests associated with a single business CI or implementor by clicking the arrow next to the business CI or implementor name.

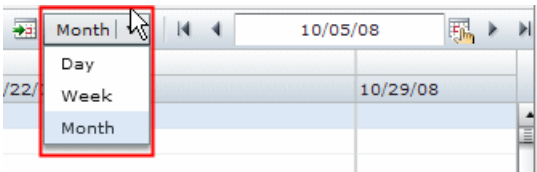


Change Request Timeline View

In the Change Request Timeline view, you can select a particular date around which to display change requests. You can display the change requests for this date only, or in the context of the week or month during which the date falls.

To configure the Change Request Timeline display:

- 1 Select a time frame over which to display the change requests.

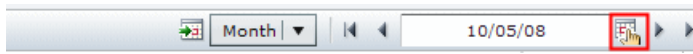


From the time frame selector, select one of the following time frames:

- ▶ **Day.** Displays the change requests for the selected date only.
- ▶ **Week.** Displays the change requests for the week surrounding the selected date.
- ▶ **Month.** (Default) Displays the change requests for the month surrounding the selected date.

2 Select the date you want to display.

- Click the calendar button on the right side of the toolbar.



Select the date you want to display. The calendar displays the selected date.

- To display the current date, click the **Now** button.



- Alternatively, scroll through the timeline by clicking the navigation arrows adjacent to the date box.

Navigating the timeline is relative to the time frame selected.
For example:

- If **Month** is selected, clicking the navigation button to the right of the date box displays the change requests for the following month.
- If **Week** is selected, clicking the navigation button to the left of the date box displays the change requests for the previous week.

Filtering Timeline Views

In the Business CI and Implementor Timeline views, only the business CIs and implementors that are included in the selected filter are displayed. In the Change Request Timeline view all the change requests in the system are included unless they are filtered out. When a filter is in place, it filters the change requests in all of the different views. For details on working with filters, see Chapter 3, “Filtering Change Requests, Activities, and Action Items.”

Viewing Impact Severity Levels

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

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

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

Note: For more information about impact analysis and how impact severity is calculated, see Chapter 9, “Viewing Impact Analysis Results.”

Viewing Time Period-Related Data

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

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

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

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



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

7

Working in the Action Items Mode

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

This chapter includes:

- About Action Items on page 90
- Viewing Action Items on page 91
- Working with Action Items on page 95

Note: By default, the Action Items mode displays all the action items that were created from all the change requests in the system. For information on filtering the action items displayed, see Chapter 3, “Filtering Change Requests, Activities, and Action Items.”

About Action Items

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

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

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

Note:

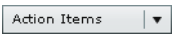
- A change request can have multiple action items associated with it, but an action item can be associated with only one change request.
 - By default, HP Release Control automatically creates action items for certain change requests. For details, refer to the *HP Release Control Installation and Configuration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

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

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

This chapter describes the Action Items pane of the Action Items mode. For information on the Action Items view of the Collaboration tab, see “Viewing Action Items” on page 152.

Viewing Action Items



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

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





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

A screenshot of a software interface showing a list of action items. The window title is "Respond". The list has columns for "Subject", "Due Date", and "Creator". The fourth row is highlighted. The status bar at the bottom shows "Page 1 of 1".

Subject		Due Date	Creator
Review the impact analysis and let me know if it's accurate.	✓	05/17/08	Doe, John
Review the impact analysis and let me know if it's accurate.	✓	05/10/08	Doe, John
Please review the impact analysis.	✓	05/17/08	Doe, John
Please review the impact analysis.	+	05/07/08	Maimon, Amnon
Please check the impact on Peoplesoft.	+	05/17/08	Cohen, Nadav
Review the impact analysis on SAP and let me know if it's accurat	+	05/17/08	Doe, John

List View

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

Column	Description
Subject	<p>Displays a brief overview of the action item.</p> <p>Parent action items can be expanded to display all the derived action items. To expand or collapse action items, click the Expand button  to the left of the item.</p> <p>Derived action items are displayed in light blue.</p>
Status	<p>Displays an icon indicating the status of the action item.</p> <p>The following icons indicate the following statuses:</p> <ul style="list-style-type: none"> Open Done Closed <p>A tooltip indicating the status of the action item is visible when you hold the mouse pointer over the action item icon.</p>
Priority	<p>Displays a colored flag indicating the priority level that the creator assigned to the action item.</p> <p>The color of the flag indicates the priority level as follows:</p> <ul style="list-style-type: none">➤ Red – High➤ Yellow – Normal➤ Green – Low <p>A tooltip indicating the priority of the action item is visible when you hold the mouse pointer over the action item icon.</p>

Column	Description
Due Date	<p>The day by which the creator determined that the action item must be completed. If this date has passed and the item has not been closed, the due date is displayed in red.</p> <p>A tooltip indicating the due date (including the day and hour) of the action item is visible when you hold the mouse pointer over the action item icon. If the due date has passed and the item has not been closed, [Expired] is also included in the tooltip.</p>
Creator	Displays the name of the user who created the action item. The creator is also the user responsible for marking the action item as Closed .
Assigned to	<p>Displays the name of the user to whom the action item was assigned. This user can respond to the request in one of the following ways:</p> <ul style="list-style-type: none"> ► Complete the task involved and mark the action item as Done once it has been completed. ► Reject the request and return it to the creator. <p>If necessary, the assignee can also create a new, derived action item from the current action item. For details on all of the above actions, see “Working with Action Items” on page 95.</p>
Pending on	Displays the name of the user whose action is being awaited. If the item is open, the name of the assignee, who is supposed to mark the item as Done , is displayed in this column (unless the assignee returned the item to the creator). If the item is marked as Done , the name of the creator, who is supposed to mark the item as Closed , is displayed in this column.
Modified	Displays the date (including the day and hour) on which the action item was last modified. If the item has not been modified since its creation, this column displays the item’s creation date and time.
ID	Displays the HP Release Control-generated ID number of the action item.

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

Details View

The **Action Item Postings** pane of the Action Items pane contains the following information for each selected action item:

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

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

Working with Action Items

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

Note: This section describes only select buttons on the Action Items toolbar. For a full explanation of the toolbar, see “Working with the Action Items Toolbar” on page 61.

This section describes:

- “Creating an Action Item” below
- “Editing an Action Item” on page 97
- “Adding a Comment to an Action Item” on page 97
- “Returning an Action Item” on page 98
- “Changing an Action Item's Status” on page 98

Creating an Action Item

You create an action item for a specific change request.

To create an action item:

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



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

Add Action Item

Creator: admin, admin Due Date:

Request ID: C-00000032

Assignee: *

Subject: *

Priority: Low ▼

Description:

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

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

- 4 Click the user selection icon to the right of the **Assignee** box, locate and select the user to whom you want to assign the action item, and click **OK**. The user name of the user you selected appears in the **Assignee** box.
- 5 In the **Subject** box, enter a brief overview of the action item.
- 6 In the **Priority** box, select the priority—**Low**, **Normal**, or **High**—you want to assign the action item.
- 7 If you selected an action item in step 1 and are the action item's assignee, choose whether you want to create the action item as a new item or as a derived action item. A derived action item is listed under the parent item in the Action Items pane.
- 8 In the **Description** box, enter a brief summary of the action item.

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

Editing an Action Item

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

To edit an action item:



- 1 In the Action Items pane, select the action item you want to modify and click the **Edit Action Item** button. The Edit Action Item dialog box opens.
- 2 Modify the due date, assignee, subject, priority, and/or description, as required. For details, see “Creating an Action Item” on page 95.

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

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

Adding a Comment to an Action Item

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

To add a comment to an action item:



- 1 In the Action Items pane, select the action item to which you want to add a comment and click the **Respond** button. The Respond dialog box opens.
- 2 If you are the action item's creator or assignee, select **Respond with a post**.
- 3 In the **Subject** box, enter a brief overview of the comment you are adding.
- 4 In the **Description** box, enter the full text of your comment.

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

Returning an Action Item

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

To return an action item:



- 1 In the Action Items pane, select the action item that you were assigned and click the **Respond** button. The Respond dialog box opens.
- 2 Select **Post and pend the action item on <creator>**. **Send it back to:** <creator> appears in the **Subject** box.
- 3 In the **Description** box, enter the reason why you do not want to accept the action item.
- 4 Click **OK**. Your action is now listed as a comment in both the Action Items pane and the Collaboration tab's Action Items view. The action item is now listed as pending on the creator.

Changing an Action Item's Status

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



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



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



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

8

Viewing Change Request Summary Information

This chapter describes the overview and detailed information displayed for each change request. If you are working with the Change Requests mode, the tabs display information for each selected change request. If you are working with the Action Items mode, the tabs display information for the change request associated with each selected action item.

This chapter includes:

- Viewing Change Request Overviews on page 99
- Viewing Change Request Details on page 102

Viewing Change Request Overviews

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

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

- General Information
- Analysis Information
- User Information

General Information

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

- **Request ID.** The reference ID number of the change request in the service desk application.
- **Service desk.** The service desk application from which the change request originated.
- **Scheduled for.** The scheduled start time of the change request.
- **Duration.** The scheduled duration of the change request.
- **Status.** The status of the change request as defined in the service desk application.
- **Outcome.** The outcome of the change request. The outcome is submitted in the Review tab. The Outcome value links to the Review > Conclusion tab.

Analysis Information

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

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

For more information about impact analysis and how impact severity is calculated, see Chapter 9, “Viewing Impact Analysis Results.”

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

For more information about collisions and how collision severity is calculated, see Chapter 10, “Viewing Change Request Collisions.”

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

For more information about the Risk tab and how the risk level is calculated, see Chapter 11, “Viewing Change Request Risk Analysis.”

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

For more information about impact analysis, see Chapter 9, “Viewing Impact Analysis Results.”

- **Affected business CIs.** Displays the number of business CIs that were affected as a result of the change request. The displayed number serves as a link to the Impact Analysis tab.

For more information about impact analysis, see Chapter 9, “Viewing Impact Analysis Results.”

- **Abnormal due to.** If the change request breached the recurrence rules of a time period category, the name of the category is displayed.

User Information

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

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

Note: The discussion and voting data link to the Discussion view in the Collaboration tab. For more information, see “Viewing and Adding Discussion Threads and Comments” on page 153.

Viewing Change Request Details

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

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

Field	Description
Service desk	The service desk application in which the change request originated.
Contact person	The name of the user responsible for the change request.
Contact location	The geographic location of the person responsible for the change request.
Initiated by	The person initiating the request (first level change requests only).
Opened by	The person initiating the request (second level change requests only).
Priority	The HP Release Control priority level of the change request. When you configure HP Release Control, you configure the priority levels that can be assigned to a change request.
Urgency	The urgency assigned to the request by the request initiator.
Emergency	Indicates that the change request is handled according to the Emergency Change procedure.

Field	Description
Estimated risk	The estimated risk level that was assigned to the change request by a user.
Created	The time at which the change request was originally created in the service desk application.
Planned start	The time at which the execution of the change request is scheduled to begin.
Planned end	The time at which the execution of the change request is scheduled to end.
Category	The category describing the type of change request.
Subcategory	Elaborates on the category field, and describes the type of change request in further detail.
Request ID	The reference ID number of the change request in the service desk application.
Impact severity	The HP Release Control-calculated impact severity level of the change request. For more details, about impact severity, see Chapter 9, “Viewing Impact Analysis Results.”
Last impact analysis	The time at which an impact analysis was last calculated.
Risk analysis	Displays a number between 0-100, calculated by HP Release Control, that indicates the risk level of this change request relative to the other change requests. For more information about the Risk tab and how the risk level is calculated, see Chapter 11, “Viewing Change Request Risk Analysis.”
Implementors	The people responsible for implementing the change request.
Last updated	The time at which the change request was last updated in the service desk application.
Actual start	The time at which execution of the change request actually began.
Actual end	The time at which execution of the change request actually ended.

Field	Description
Requested end date	The latest date by which to implement the request.
Scheduled downtime start	The change activity's planned downtime start time.
Scheduled downtime end	The change activity's planned downtime end time.
Description	A description of the change request, taken from the request's Description field.

Note: For details on customizing the Preview > Details tab, refer to the *HP Release Control Installation and Configuration Guide*.

9

Viewing Impact Analysis Results

This chapter describes how to view the impact analysis calculation results for a change request. You view the impact analysis calculation results for a change request in the Assess > Impact tab. The Impact tab displays the business and system CIs that are affected by the change request. This includes general information about the affected business or system CIs and an indication of the severity of the impact of the change request.

This chapter includes:

- Working with the Impact Tab on page 105
- Viewing Impact Severity Levels of System CIs on page 106
- Viewing Impact Severity Levels of Business CIs on page 107
- Viewing CI Attributes on page 107
- Viewing Impact Graphs on page 107

Working with the Impact Tab

The Impact tab is divided into three sections: Impact CIs, Affected by, and Affects. The Impact CIs section displays the affected and changed CIs (ACIs and CCIs). The Affected by section displays the CIs which have an affected on the selected CI, and the Affects section displays the CIs which are affected by the selected CI. This information can also be viewed graphically by clicking the **Open Graph Window** button. For more information see “Viewing Impact Graphs” on page 107.









CIs can be expanded to display all the child CIs. To expand or collapse a CI, click the **Expand** button next to the CI.



Viewing Impact Severity Levels of System CIs

The impact severity level of a CI that is explicitly mentioned in the ticket (Triggered CI) is automatically set to **critical**. The severity of any CIs which are not triggered CIs are calculated by HP Universal CMDB.

The following table displays the default impact severity level icons:

Icon	Impact Severity Level
	Critical
	High
	Medium
	Low
	Very Low
	No impact analysis available



If a CI is directly affected by the change request (CCI), a black circle surrounds the impact severity level icon.





If a CI is triggered directly from the ticket (Triggered CI), a ticket symbol is added to the impact severity level icon.

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

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

Viewing Impact Severity Levels of Business CIs

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

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



If a CI is triggered directly from the ticket (Triggered CI), a black circle surrounds the impact severity level icon.

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

Viewing CI Attributes



You can view CI attributes by selecting a CI and clicking the **CI Attributes** button. To customize the attributes that HP Release Control displays, see the *HP Release Control Installation and Configuration Guide*.

Viewing Impact Graphs



The relationships between triggered CIs and the CIs which are related to them with respect to impact analysis can be viewed in the Assess > Impact tab or as a graph. To view this data in graph format, click the **Open Graph Window** button. The impact graph window opens.

The graph displays a visual representation of the impact relationships of the selected change request. The CIs are connected by lines with arrows indicating the direction of impact. For example, if a CI named host11 has an arrow pointing to serverB, it means that host11 affects serverB.



You can enlarge the display by using the **zoom** button.

You can manipulate the display by dragging and dropping individual CIs. The lines, arrows, and relationships will not be affected.

Impact graphs for individual CIs or groups of CIs can be viewed by selecting the CI or CI group while in the impact graph window. To return to the original display, click the **Goto Root Node** button.



Customizing the Impact Graph Display Layout

You can customize the impact graph layout to reorganize the CIs while still maintaining the same impact relationships.

The following table displays the types of layouts and their buttons:

Button	Layout Type
A small icon showing concentric circles, representing the Concentric Radial Layout.	Concentric Radial Layout
A small icon showing a hierarchical tree structure, representing the Hierarchy Layout.	Hierarchy Layout
A small icon showing a central node with arrows pointing outwards, representing the Parent-Centered Radial Layout.	Parent-Centered Radial Layout
A small icon showing four nodes connected by lines, representing the Spring Forced Layout.	Spring Forced Layout

10

Viewing Change Request Collisions

HP Release Control automatically identifies change requests involving common key elements that are scheduled to take place at the same time or adjacent to one another, causing **change request collisions**.

Note: All references to change requests in this chapter relate to change requests associated with action items as well.

This chapter includes:

- Understanding Change Request Collisions on page 109
- Viewing Collision Details on page 113
- Performing a Customized Collision Calculation on page 123

Understanding Change Request Collisions

Change requests are defined as colliding when:

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

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.

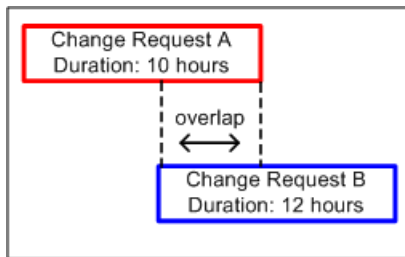
To understand the factors taken into account when calculating collisions, see:

- “Collision Proximity Levels” on page 110
- “Causes of Collision” on page 111
- “Collision Severity” on page 112

Collision Proximity Levels

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

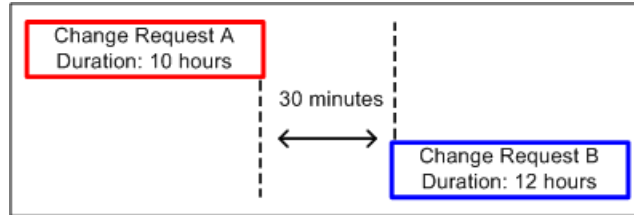
- **Overlap.** The two change requests have overlapping schedules.



- **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 can change the time gap according to which HP Release Control determines whether two change requests are in close proximity in the **change-flow.settings** configuration file (<installation directory>\conf\). For details, see the *HP Release Control Installation and Configuration Guide*.

Causes of Collision

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.

Collision Severity

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
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 change the severity level definitions in the **change-flow.settings** configuration file (<**HP Release Control installation directory**>\conf\). For more information, see the *HP Release Control Installation and Configuration Guide*.

Viewing Collision Details

The Collisions tab displays details about all the change requests that collide with the change request selected in the Change Requests pane.

By default, collisions are calculated automatically for scheduled change requests. You can also perform manual collision calculations to view potential collisions if you were to modify a change request's schedule. For more information, see "Performing a Customized Collision Calculation" on page 123.

In the Collisions tab, you can view collisions in the List view or Timeline view. In both views, the causes of collisions are also displayed.

This section includes:

- “List View” on page 114
- “Timeline View” on page 117
- “Viewing Collision Cause Details” on page 118
- “Viewing Collisions with Colliding Requests” on page 121

List View










In the List view, change requests that collide with the change request selected in the Change Requests pane are displayed in a table. The table is sorted in order of the severity of the collisions.

Summary	Request ID	Causes	Start	End
Activate delete trigger for deleted assets on th...	C-00000516	CCI/CCI	07/10/08	07/1
SOX Remediation and Validatio/n of GCRM Ser...	T-00000117	DAB/DAB	07/11/08	07/1

Tip: Hold the cursor over an element in the table to view a tooltip with relevant information.

The Collisions table displays the following information:

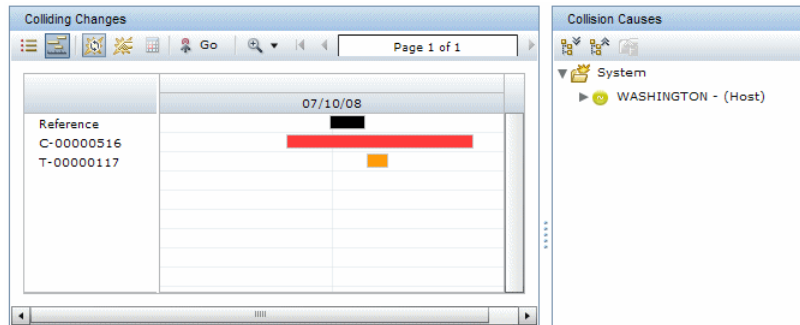
Column	Description
Collision Severity	<p>Displays an icon indicating the severity of the collision. If there are multiple causes for a collision, the collision severity is determined by the most severe of the causes.</p> <p>Collision severity is indicated as follows:</p> <p> Critical (red)</p> <p> High (orange)</p> <p> Medium (yellow)</p> <p> Low (khaki)</p> <p> Very Low (olive green)</p> <p>For details about how collision severity is calculated, see “Collision Severity” on page 112.</p>
Proximity Level	<p>Displays an icon indicating the collision proximity level.</p> <p>Collision proximity is indicated as follows:</p> <p> Overlap</p> <p> Overlap Warning</p> <p>For more information about collision proximity levels, see “Collision Proximity Levels” on page 110.</p>
Summary	Displays a brief overview of the conflicting change request.
Request ID	Displays the service desk application request ID of the conflicting change request.

Column	Description
Causes	<p>Displays the causes of the collision. Change request collisions can be caused by several factors (CI-, business CI-, implementor-, or field-related). If multiple factors cause a collision, all of the factors are listed.</p> <p>The following is a list of all the possible collision causes:</p> <ul style="list-style-type: none"> ➤ CCI-CCI. A common CI is changed by both change requests. ➤ CCI-ACI. A common CI is changed by one of the change requests and indirectly affected by the other change request. ➤ ACI-ACI. A common CI is indirectly affected by both change requests. ➤ DAB-DAB. A common business CI is directly affected by both change requests. ➤ IAB-DAB. A common business CI is directly affected by one of the change requests and indirectly affected by the other change request. ➤ IAB-IAB. A common business CI is indirectly affected by both change requests. ➤ Implementor. A common implementor is responsible for implementing both change requests. ➤ Field. A specified field has the same value in both change requests. <p>For more information about collision causes, see “Causes of Collision” on page 111.</p>
Start	Displays the date on which the implementation of the conflicting change request is scheduled to begin.
End	Displays the date on which the implementation of the conflicting change request is scheduled to end.

Timeline View



Timeline view displays colliding change requests as solid bars on a timeline. Each block represents a different colliding change request.



The change request selected in the Change Requests pane is always displayed first on the timeline, and is labeled **Reference**. The colliding change requests are labeled by their request IDs.

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

By default, the collision severity is indicated as follows:

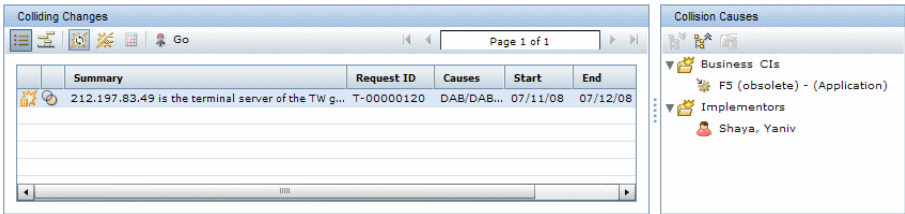
- **Red.** Critical.
- **Orange.** High.
- **Yellow.** Medium.
- **Khaki.** Low.
- **Olive Green.** Very low.
- **Gray.** No collision analysis available.



Tip: When you click the **Zoom In/Zoom Out** button (available in Timeline view only), the time interval selection ruler appears. Use this ruler to divide the timeline into 1-hour or 6-hour time intervals.

Viewing Collision Cause Details

When you select a change request in the List or Timeline view, details of the factors causing the collision are displayed in the **Collision Causes** pane on the right side of the Collisions tab.

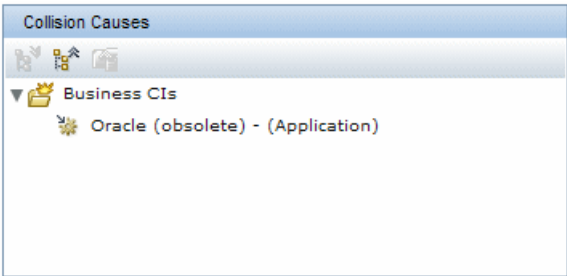


- To expand or collapse the collision causes in the Collision Causes pane, click the **Expand All** or **Collapse All** buttons .
- To view a CI's attributes (defined during the HP Release Control configuration process), select the CI in the Collision Causes pane and click the **CI Attributes** button.
- To view a tooltip with the CI's full details, hold the cursor over the CI.



Collision Cause: Business CI

If a commonly affected business CI causes the collision, it is listed in the Collision Causes pane, under **Business CI**.



The icon to the left of the business CI indicates whether it is directly or indirectly affected by the collision.



- If at least one of the CIs associated with the business CI is a CCI, then the business CI is directly affected by the collision.

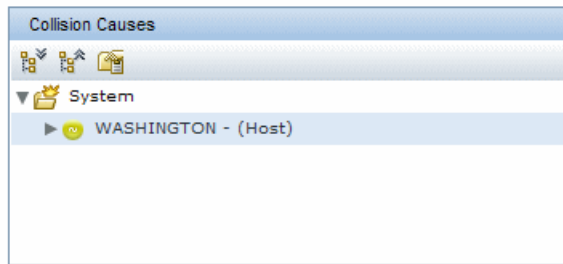


- If all of the CIs associated with the business CI are ACIs, then the business CI is indirectly affected by the collision.

You can filter the change requests so that only those that affect a particular business CI are displayed. To do this, right-click the business CI in the Collision Causes pane and select **Quick filter: show affecting requests**. Only the change requests that affect this business CI are displayed in the Change Requests pane.

Collision Cause: System

If one of the collision causes is common affected system CIs, you can view a list of these CIs in the Collision Causes pane, under **System**.

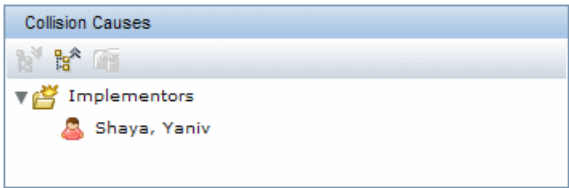


The colliding CIs are listed alongside icons that indicate the impact severity of the CIs. For more information about impact severity, see Chapter 9, “Viewing Impact Analysis Results.”

Note: If you are working with HP Release Control without HP Universal CMDB, ACIs cannot be detected. The only CI-related cause of collision, then, is **CCI-CCI**.

Collision Cause: Implementor

If one of the collision causes is a common implementor, the name of the implementor responsible for implementing the change requests is displayed in the Collision Causes pane, under **Implementors**.



Viewing Collisions with Colliding Requests

The Colliding Changes pane displays requests that collide with the change request selected in the Change Requests pane. You can select any colliding change request displayed in the Colliding Changes pane, and view the change requests with which it collides.

To view requests that collide with a colliding request:

- 1 In the Colliding Changes pane, select a colliding request.

The screenshot shows the 'Change Requests' pane at the top, displaying a list of requests. Below this, the 'Colliding Changes' pane is active, showing a detailed view of a selected request and its collisions.

Summary	Risk	Request ID
Change X400 connectors from SG to IL/US during planned server downtime	(36) Medium	C-00000129
Change X400 connectors from SG to IL/US during planned server downtime	(21) Low	C-00000142
Changing Firewall setting to allow access to new AD domain	(15) Low	T-00000153
Add 512 MB to terminal server called WASHINGTON. Using by the TW.	(40) Medium	C-00000157
Changing Firewall setting to allow access to new AD domain	(15) Low	C-00000179
Changing Firewall setting to allow access to new AD domain	(25) Low	C-00000192
Activate delete trigger for deleted assets on the IL ftp server	(20) Low	C-00000204

The 'Colliding Changes' pane shows a table with the following data:

Summary	Request ID	Caus
Activate delete trigger for deleted assets on the IL ftp server	T-00000503	DAB/
SOX Remediation and Validatio/n of GCRM Servers	T-00000117	DAB/
Changing Firewall setting to allow access to new AD domain	T-00000504	Imple

The 'Collision Causes' pane on the right shows a tree view with the following structure:

- Business
 - J2EE_WebSphere_Clus
 - J2EE_WebSphere_Ho



- 2 Click the **Go to Colliding Request** button The change request that you selected in the Colliding Changes pane is displayed alone in the Change Requests pane, and any requests that collide with that change request are displayed in the Colliding Changes pane.

View: Change Requests Change Requests: Single Change Action Items: Any (Results: 1)

Summary

Activate delete trigger for deleted assets on the IL ftp server (28) Low T-00000503

Preview Assess Collaborate Review

Impact Collisions Risk Similar Changes

Colliding Changes

Summary Request ID

Add 512 MB to terminal server called WASHINGTON. Using by.. C-00000157

Change X400 connectors from SG to IL/US during planned serv.. C-00000116

Deployment of new webmail server T-00000193

SOX Remediation and Validatio/n of GCRM Servers T-00000117

Rebuild JACKET search server located in EMEA T-00000177

212-103-05-63 is the terminal server for the T-00000055

Collision Causes

Implementors

Gvirtsman, Ahi

122

Performing a Customized Collision Calculation

Before rescheduling a change request, you can check if the change request will collide with other requests at the time you want to reschedule, or you can search for a time frame that will involve a minimal number of collisions. You do this by performing a customized collision calculation.

To perform a customized collision calculation:

- 1 In the Change Requests or Action Items pane, select the relevant change request, or action item associated with the relevant change request.
- 2 In the Collisions tab, click the **Customized Mode** button. If you have not yet set a time frame for your calculation during the present session, the Set Manual Time Window dialog box opens automatically.



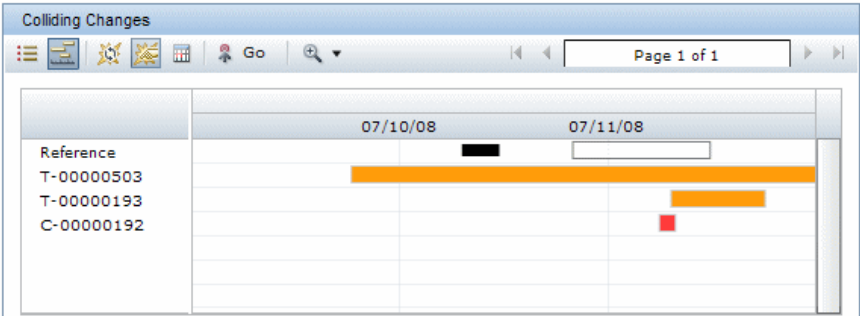
If you have already set a time frame for the calculation during the present session and you want to change it, click the **Set Collision Time Frame** button in the Collisions tab to open the Set Manual Time Window dialog box.



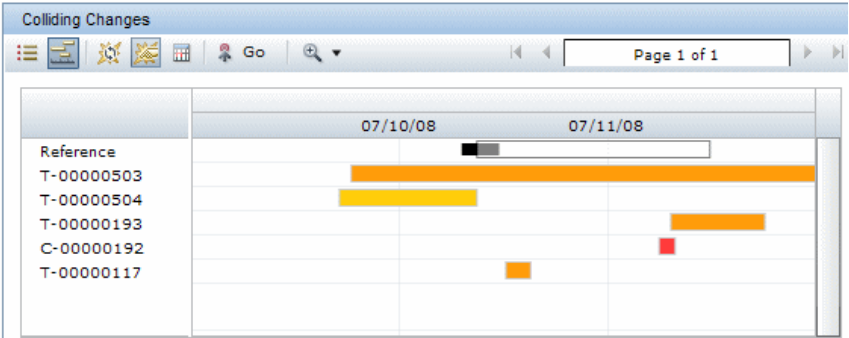
- 3 In the **Planned start** and **Planned end** boxes, select the start and end times for the time frame you want to evaluate (according to your machine's time zone) and click **OK**. The Collisions tab displays the change requests that collide with the selected change request during the new time frame.

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

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



If the original and modified time frames overlap, the overlap is displayed as a solid gray bar within the empty bar.



To return to the standard mode where collisions are calculated automatically for the scheduled change requests, click the **Standard Mode** button.



11

Viewing Change Request Risk Analysis

This chapter describes Change Request 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 125
- Example of Risk Analysis Calculation on page 126
- Working with the Risk Tab on page 129

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.

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

Example of Risk Analysis Calculation

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

During the configuration process, the HP 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:

$$\text{Probability of Failure (4.2) X Potential Damage (5) = Calculated Risk (21)}$$

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

Working with the Risk Tab

You view the risk analysis for a change request in the Assess > Risk tab. The Risk tab displays an overall summary of the risk analysis for the selected change request including distribution charts of the risk factors contributing to the Potential Damage and Probability of Failure calculations. These distribution charts enable you to pinpoint the most significant factors contributing towards the risk level of the selected change request.

The risk calculation is displayed in the Risk Information pane. If an override rule is in place, details of the override rule are displayed alongside the distribution charts.

Viewing Risk Analysis Details



Within the Potential Damage and Probability of Failure panes, you can view the risk calculation details by clicking on the **Drill Down** button. A distribution chart that graphically illustrates the proportional contribution of each risk factor to the Potential Damage calculation is displayed alongside a table that describes details about each risk factor. The same distribution chart is also displayed in the Risk Analysis view.

The table includes the following columns:

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

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



To return to the general view, click the **Back** button.

12

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.

This feature is based on an adaptive algorithm developed by HP Labs. A user with the Similarity Teacher role can tune this algorithm by adding, deleting or confirming similar changes.

In other words, by tuning the similarity algorithm, the Similarity Teacher actually modifies the way HP Release Control calculates similarity between change requests, thereby yielding more meaningful results in the future.

This chapter includes:

- Viewing Similar Changes on page 134
- Working With Similar Changes on page 135

Viewing Similar Changes

You view a list of similar changes in the **Assess** tab of the Details and Analysis pane.

To view similar changes:

- 1 In the Change Requests List View, select the desired request.
- 2 In the Details and Analysis pane, click the Assess tab and select **Similar Changes**. HP Release Control displays a list of changes which are similar to the selected request.

Summary	Confirmed	Risk	Request ID	Outcome	Started	Ended	Review Date
212.182.71.60 is the terminal server ..	✓	(20) Low	C-00000029	Not Reviewed	05/18/08	05/18/08	
212.197.71.165 is the terminal serve..	✗	(16) Low	C-00000393	Not Reviewed	05/15/08	05/15/08	
212.190.85.97 is the terminal server ..	✗	(18) Low	C-00000068	Successful	05/13/08	05/13/08	05/20/08
212.186.79.191 is the terminal serve..	✗	(12) Low	T-00000094	Not Reviewed	05/11/08	05/12/08	
212.179.74.198 is the terminal serve..	✗	(28) Low	C-00000133	Not Reviewed	05/11/08	05/13/08	
212.194.88.64 is the terminal server ..	✓	(30) Low	T-00000263	Not Reviewed	05/03/08	05/04/08	
212.193.77.162 is the terminal serve..	✓	(35) Medium	C-00000081	Successful ...	04/30/08	05/03/08	05/08/08
212.185.79.68 is the terminal server ..	✗	(36) Medium	T-00000523	Not Reviewed	04/26/08	04/28/08	
212.183.70.26 is the terminal server ..	✗	(16) Low	T-00000276	Not Reviewed	04/20/08	04/20/08	
212.193.76.97 is the terminal server ..	✗	(25) Low	T-00000445	Not Reviewed	04/17/08	04/18/08	

The Similar Changes list displays the following information:

- **Summary.** Displays a brief overview of the request.
- **Confirmed.** Indicates requests which have been added to the list or have been confirmed as being similar. For more information, see “Working With Similar Changes” on page 135.
- **Impact Severity.** Indicates the impact severity level of the request.
- **Risk.** Displays a number from 0-100 that indicates the risk level of the request relative to other requests. A higher number indicates a higher risk level.
- **Request ID.** Displays the reference ID number for the request in the service desk application.
- **Outcome.** Displays the outcome for the request. Requests with any status other than **Closed** are automatically assigned the outcome **Not reviewed**.

- **Started.** Displays the start date for the request.
- **Ended.** Displays the end date for the request.
- **Review Date.** Displays the date a Post Implementation Review (PIR) was created for the request. For more information on PIRs, see “Reviewing Post Implementation Conclusions” on page 161.

Working With Similar Changes

You can use the Similar Changes list to view aggregate statistics about the displayed requests. In addition, if you are the Similarity Teacher, you can add, remove, or confirm requests as being similar.

This section includes:

- “Viewing Similar Changes Statistics” on page 135
- “Adding Changes to the List” on page 137
- “Confirming Request Similarity” on page 138
- “Deleting Requests from the List” on page 139
- “Viewing Post Implementation Review (PIR) Details for Similar Changes” on page 139
- “Viewing Other Similar Changes” on page 140

Viewing Similar Changes Statistics

You can view aggregate Outcome and Disrupted Business CI statistics for all requests that appear in the list.

To view similar changes statistics:

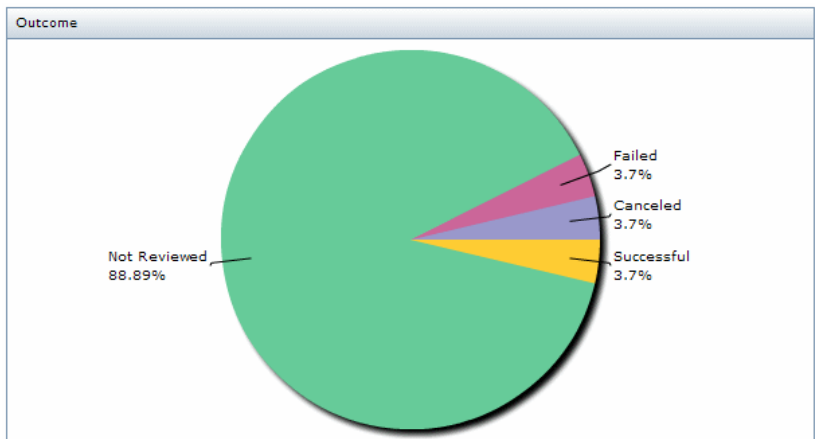
- 1** In the Change Requests List View, select the desired request.
- 2** In the Details and Analysis pane, click the **Assess** tab and select **Similar Changes**. HP Release Control displays a list of requests which are similar to the selected request.



- 3 Click the Statistics icon. The Outcome and Disrupted Business CIs graphs are displayed. The information displayed in the graphs is aggregated over all the requests displayed in the Similar Changes list.

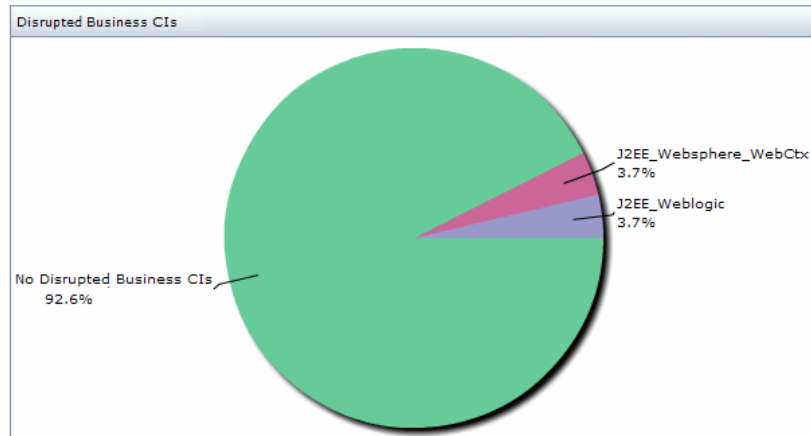
Outcome Statistics

The Outcome pie chart shows aggregate outcome statistics for all the requests in the Similar Changes list.



Disrupted Business CIs Statistics

The Disrupted Business CIs pie chart specifies which other business CIs were affected by the similar changes.



Adding Changes to the List

HP Release Control calculates similar changes according to specific criteria as defined in the similar settings directory. The Similarity Teacher can add requests to the Similar Changes list even if they are not automatically regarded as being similar according to these criteria.

To add a request to the Similar Changes list:



- 1 Click the **Add Change Request to Similarity Set** icon on the Similar Changes toolbar. The Add Change to Similarity Set dialog box opens.

Add change request to similarity set [X]

Service Desk: ▼

Request ID:

Adding change requests as similar will influence the way the system calculates similarity in the future.

- 2 In the **Service Desk** box, select the relevant service desk from the drop down list.
- 3 In the **Request ID** box, enter the ID of the request you wish to add to the list.
- 4 Click **OK**. The request is added to the list and a check mark appears in the **Confirmed** column.


Notes:

- Adding a request to the Similar Changes list influences the way HP Release Control calculates future similar changes.
 - This option is only available to a user with the Similarity Teacher role.
-

Confirming Request Similarity

The Similarity Teacher can confirm a request as being similar. This guarantees that the request will always appear in the Similar Changes list, irrespective of any other changes that are made to the list.

To confirm a request as being similar:

- 1 Select the request in the Similar Changes list.
-  2 Click the **Confirm Change Request Similarity** icon on the Similar Changes toolbar.
- 3 Click **Yes** on the message that appears. The request is confirmed as being similar, and a check mark appears in the **Confirmed** column.


Notes:

- Confirming a request as similar influences the way HP Release Control calculates future similar changes.
 - This option is only available to a user with the Similarity Teacher role.
-

Deleting Requests from the List

HP Release Control calculates similar changes according to specific criteria as defined in the similar settings directory. The Similarity Teacher can delete requests from the Similar Changes list even if they are regarded as being similar according to these definitions.

To delete a request from the Similar Changes list:

- 1 Select the request in the Similar Changes list.
-  2 Click the **Delete Change Request from Similarity Set** icon on the Similar Changes toolbar.
- 3 Click **Yes** on the message that appears. The request is deleted from the Similar Changes list.


Notes:

- Deleting a request from the Similar Changes list influences the way HP Release Control calculates future similar changes.
 - This option is only available to a user with the Similarity Teacher role.
-

Viewing Post Implementation Review (PIR) Details for Similar Changes

You can view PIR details for any similar change with **Closed** status where a PIR was created. For more information on creating a PIR, see “Reviewing Post Implementation Conclusions” on page 161.

To view PIR details for a similar change:

- 1 In the Similar Changes list, select a request which has been reviewed.
-  2 Click the **Open Similar Details Window** icon on the Similar Changes toolbar. The Similar Details window opens and displays the Disrupted Business CIs and Review Notes information entered during the creation of the PIR.

Viewing Other Similar Changes

You can view the list of similar changes for any request that appears in the Similar Changes list.

To view similar changes of a listed request:

- 1 In the Similar Changes list, select the desired request.



- 2 Click the Go to Similar Request icon. The selected request is displayed in the Change Requests list view, and the Similar Changes list is updated to now display the list of similar changes for the newly selected request.

13

Change Planner

You use the HP Release Control Change Planner to simulate the effects of modifying the details of a change request. If you are satisfied with the outcome of the simulation, you can update the details of the change request inside the originating service desk.

This chapter includes:

- About The Change Planner on page 142
- The Change Planner at a Glance on page 143
- Running a Simulation on page 145
- Viewing Simulation Results on page 146
- Saving Change Request Details to the Service Desk on page 148

About The Change Planner

You use the Change Planner to simulate the effects of modifying the following change request details:

- The planned start and end of the change request.
- The CIs that are changed as a result of the change request (CCIs).

If you are using HP Service Manager as your service desk, you can save the updated planned start and end times of the change request to the service desk.

To access the Change Planner:






In the Analysis module in **Change Requests** mode, click the drop-down arrow next to the **Change Planner** button and select one of the following options:

- **Plan Selected Change.** The Change Planner opens, displaying the current details of the selected change request. Use this option to simulate changes to an existing change request.
- **Plan New Change.** The Change Planner opens without any current change request data. Use this option to simulate a new change.

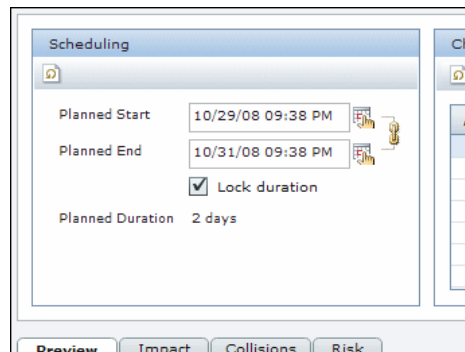
The Change Planner at a Glance

The Change Planner is divided into the following sections:

Change Planner Toolbar

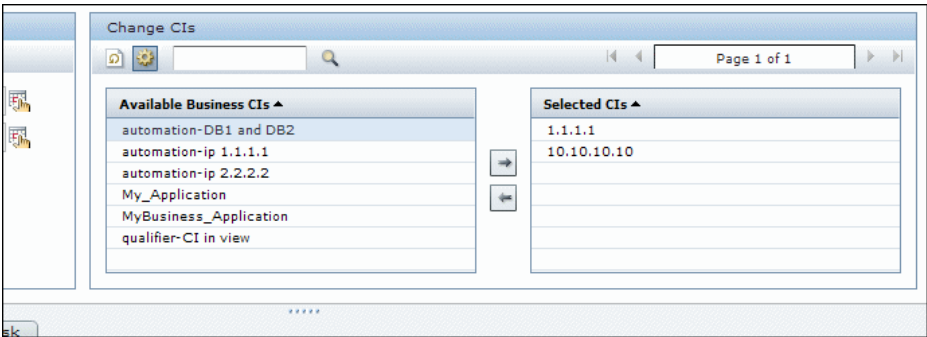
Icon	Name	Description
	Run Simulation	Runs the change planner simulation. See “Running a Simulation” on page 145
	Save	Saves the updated planned times of the change request to your service desk. See “Saving Change Request Details to the Service Desk” on page 148. Note: If you are simulating a new change, this option is not available.
	Open the Original Request	Opens the Change Request in the originating service desk. Note: If you are simulating a new change, this option is not available.

Time Configuration Pane



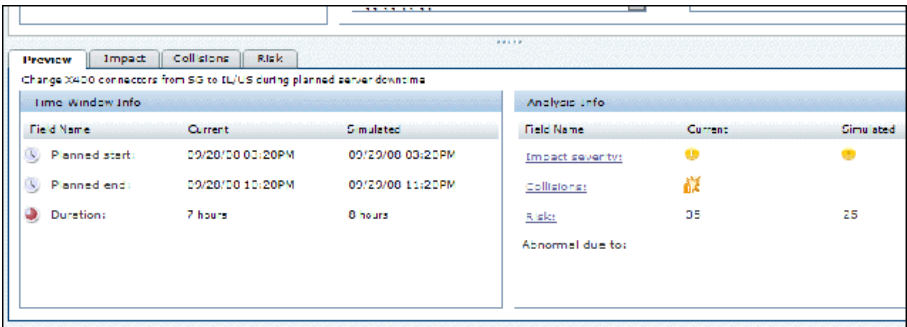
In the Time Configuration pane, you set the planned start and end for the change request simulation. If you are working with HP Service Manager, you can save the updated times to your service desk.

Change CI Configuration Pane



In the Change CI Configuration pane, you select the CIs that will be changed as part of the change request simulation (CCI).

Change Planner Details Pane








In the Change Planner details pane, you view the results of the change simulation including an analysis of the simulated impact, collisions, and risk. When you open the Change Planner, the Change Planner details pane displays the current analysis data for the selected change. For more information, see “Viewing Simulation Results” on page 146.

Running a Simulation

This section describes how to simulate the effects of modifying change request details.

To simulate change analysis:

- 1  In the Analysis module, select the relevant change request and click the **Change Planner** button to open the Change Planner.
- 2 In the Time Configuration pane, set the date and time for the planned start and end of the change request using the **Planned Start** and **Planned end** boxes.
 - If the change request does not include planned start and end times, these boxes will be empty.
 - To lock the duration of the change, select the **Lock duration** option. For example, if this option is selected and you modify the planned end time to 4 hours later, the planned start time is automatically adjusted to 4 hours later so that the duration of the change remains the same.
 -  To restore the currently planned times, click the **Time Reset** button.
- 3 In the Change CI Configuration pane, select the CIs that will be changed as a result of the change request (CCIs).
 -  In the **Available CIs** list, click the **Show Business CIs/System CIs** button to view either Business CIs or System CIs.
 - To select CIs, double-click the relevant CIs in the **Available CIs** list to move them to the **Selected CIs** list.
 - You can filter the available CIs using the **Find** box above the **Available CIs** list.
 -  To restore the current changed CIs, click the **CI Reset** button.
- 4  Click the **Run Simulation** button.

The simulated results are displayed in the Change Planner details pane. For more information, see “Viewing Simulation Results” on page 146.

- 5 If you are planning an existing change and you are satisfied with the results of the simulation, you can save the updated planned start and end times of the change request to the originating service desk. For details, see “Saving Change Request Details to the Service Desk” on page 148.

The save action is only available if you are using HP Service Manager as your service desk.

Viewing Simulation Results

After you run a simulation in the Change Planner (see “Running a Simulation” on page 145) you view the simulation results in the Change Planner details pane. You can view the following information:

Summary Information

You view summary information in the **Preview** tab of the details pane. The summary information is divided into two sections:

- **Time Window information.** Displays the current planned times of the change compared with the simulated time.
- **Analysis Information.** Displays a summary of the current analysis results compared with the simulated analysis results.

Impact Analysis

You view the impact analysis of the simulation in the **Impact** tab of the details pane. The information in this tab is presented in the same way as in the Analysis module’s Assess > Impact tab. For more information about viewing impact analysis results, see Chapter 9, “Viewing Impact Analysis Results.”



If you are planning an existing change, you can view the current impact analysis or the simulated impact analysis by clicking the **Filter** button and selecting the relevant option from the list.

Collisions

You view the collision analysis of the simulation in the **Collisions** tab of the details pane. The information in this tab is presented in the same way as in the Analysis module's Assess > Collisions tab. For more information about viewing collision analysis results, see Chapter 10, "Viewing Change Request Collisions."



If you are planning an existing change, you can filter the information displayed in the tab by clicking the **Filter** button and selecting one of the following options from the list:

- **Simulated Collisions.** Displays all the collisions that occur when the simulated settings are applied.
- **Additional Collisions.** Displays the additional collisions that occur as a result of the simulated settings. These collisions do not occur for the current settings.
- **Unresolved Collisions.** Displays the collisions that are common to both the current settings and the simulated settings. These collisions are not resolved as result of the simulated settings.
- **Resolved Collisions.** Displays the collisions that are resolved as result of the simulated settings. These collisions occur for the current settings and do not occur for the simulated settings.

Risk Analysis (Existing Changes Only)

If you are planning an existing change, you view the risk analysis of the simulation in the **Risk** tab of the details pane. The information in this tab is presented in the same way as in the Analysis module's Assess > Risk tab. For more information about viewing risk analysis results, see Chapter 11, "Viewing Change Request Risk Analysis."

In the risk factor tables, in the **Weighted Value** column, for each risk factor that changed, the original weighted value is displayed in square brackets.

PreviewImpactCollisionsRisk

Probability of Failure Factors Details

Name	Description	Data	Weight	Score	Weighted Value
Tech-ex	How long ago	N/A	1	10	0.3
Impl-ex	What is the ir	N/A	3	10	1.1 [0.6]
Planned	Planned dura	24	2	8	0.6 [0.3]
New-dep	Is this chang	N/A	2	5	0.3 [0.2]
Dep-inv	From how ma	N/A	2	10	0.7 [0.4]

* The factor score was disregarded because the source data is not available.

Total: 8 (8.3)


[] Original weighted value.

Saving Change Request Details to the Service Desk

After you run a simulation, you can save the updated planned start and end times of an existing change request to the originating service desk. You can also open the original request in the service desk. **These options are only available if you are using HP Service Manager as your service desk.**

For more information about configuring these options, refer to the section about configuring HP Service Manager in the *HP Release Control Installation and Configuration Guide*.

To save the planned times of the change request to the service desk:

- 
- 1

Run a simulation as described in “Running a Simulation” on page 145.
- 2

If you modified the CIs in the Change CI Configuration pane, restore the current values before saving the changes. You restore the current values by clicking the **CI Reset** button. After resetting the CI values, run the simulation again to view the new results.



- 3** Click the **Save** button to save the updated planned start and end times.

If HP Release Control is not integrated with Lightweight Single Sign-On (LW-SSO), you are asked to fill in your HP Service Manager credentials.



- 4** To view the change request in the original service desk, click the **Open the Original Request** button. To enable this option, see the section about generating an HP Service Manager/Center URL in the *HP Release Control Installation and Configuration Guide*.

14

Working with Change Request Collaboration

This chapter describes Change Request Collaboration, where users can view the change request action items, participate in discussions about the change request, and resolve open change requests.

This chapter includes:

- Working with the Collaborate Tab on page 151
- Viewing Action Items on page 152
- Viewing and Adding Discussion Threads and Comments on page 153
- Resolving Open Change Requests on page 156

Working with the Collaborate Tab

The Collaborate tab contains the following three tabs that enable users to add information to HP Release Control regarding a specific change request:

- **Action Items.** If you are in the Change Requests mode, this tab enables you to view the action items associated with a change request and work with these action items as you would in the Action Items pane of the Action Items mode. If you are in the Action Items mode, this tab enables you to view all the action items associated with the same change request as the selected action item. For information on this tab, see “Viewing Action Items” on page 152.

- **Discussion.** Enables users to post comments about a change request and express an opinion about a change request by casting a vote (Agree, Disagree, To CAB, No Vote). For information on this tab, see “Viewing and Adding Discussion Threads and Comments” on page 153.
- **Resolution.** Enables certain users to approve or retract a change request, depending on the status of the request, and all users to view the history of all the approvals and/or retractions made in HP Release Control as well as the approval status of the selected change request. For information on this tab, see “Resolving Open Change Requests” on page 156.

Viewing Action Items

The Collaborate > Action Items tab displays the action items associated with a change request. For a detailed explanation of action items, see “About Action Items” on page 90.

The Action Items tab contains two sections:

- The left-hand section displays a list view of the action items associated with the change request. For an explanation of the columns in the list, see page 92.
- The right-hand section displays information for each action item selected from the list. For an explanation of the information in this section, see page 94.

For details on working with action items, see “Working with Action Items” on page 95.

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



Viewing and Adding Discussion Threads and Comments

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

This section includes:

- “Discussion Tab at a Glance” on page 153
- “Adding a Discussion Thread” on page 154
- “Posting a Comment to a Discussion Thread” on page 155
- “Sending Discussion Threads by Email” on page 155

Discussion Tab at a Glance

The Discussion tab is divided into the following two sections:

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

You can expand all the comments included in the discussion threads by clicking the **Expand All Comments** button.



You can collapse all the comments included in the discussion threads by clicking the **Collapse All Comments** button.



You can sort the comments to either display the oldest comment first or the newest comment first. To sort the comments click the **Older First / Newer First** button.



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

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

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

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

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


Adding a Discussion Thread

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

- **Disagree**
- **To CAB**
- **Agree**
- **No Vote**

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


To add a discussion thread to a change request:

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

Posting a Comment to a Discussion Thread

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


To post a comment:

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

Sending Discussion Threads by Email

You can send one or more discussion threads by email.

To send discussion threads by email:

- 1 Using the Voting Summary tree, display the discussion threads you want to send in the Collaborate > Discussion tab.
-  2 Click the **Send Email** button in the top left-hand corner of the Discussion tab. The Send Email dialog box opens.

- 3 Enter the email address of each recipient of the email, enter any additional comments you have on the change request, and click **Send**.

Resolving Open Change Requests

In the Collaborate > Resolution tab you can do the following:

- Approve a change request or retract the approval. See “Approving and Retracting Change Requests” below.
- View approval history and status. See “Viewing Approval History and Status” on page 158
- Create CAB minutes and as pre- and post-implementation guidelines. See “Managing CAB Decisions” on page 159.

Approving and Retracting Change Requests

In the left-hand section of the Collaborate > Resolution tab, you can approve a change request and later retract this approval. This option depends on the status of the request, and is only available if you are a user with the role of **Change Approver**.

The approval/retraction of a change request within HP Release Control results in an updated status of the request within the service desk application. If you are using HP Service Manager, the approval comments are also exported along with the updated status.

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

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

To approve a change request:

- 1** In the Change Requests or Action Items pane, select the relevant change request, or action item.
- 2** Select the **Collaborate > Resolution** tab. The **Checking status** message is displayed alongside the buttons in the left-hand pane while HP Release Control checks the following:
 - Whether you are a user with the role of **Change Approver** who is authorized to approve change requests.
 - Whether request approval is authorized by the service desk application.
 - Whether the selected change request can be approved at the current time.

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

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



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

d Click Approve.

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

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

- 5 Click Close** to close the Approve Change Request dialog box. You can view details of your approval in the Change Approval pane of the Collaborate > Resolution tab. For more information, see “Viewing Approval History and Status” on page 158.



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



To retract the approval of a change request:

Follow the above procedure, substituting the **Retract** button for the Approve button mentioned above. HP Release Control retracts the approval of the change request and the retraction details appear in the right-hand pane of the Collaborate tab.

Viewing Approval History and Status

In the Change Approval pane of Collaborate > Resolution tab you can view the history of all the approvals and/or retractions made in HP Release Control as well as the approval status of the selected change request.



To view a history of approvals and retractions made in HP Release Control for the selected change, click the **Approval Log** button. The users who approved the change request or retracted approval are listed, along with comments that they posted.



If you are using HP Service Manager/Center as your service desk, you can view the approval status of the selected change by clicking the **Approval Status** button. The Change Approval pane is divided into three approval categories. Each category lists the relevant user groups (for example, **Admin**).

The following three approval categories are displayed:

- **Completed Approvals.** Lists the user groups who have already approved the change.
- **Pending Approvals.** Lists the user groups whose approval is still required.
- **Future Approvals.** List the user groups who can only approve a change after a different user group has already approved it. The user groups that need to first approve the change, are listed in the **Pending Approvals** category.

For more information about configuring these options, refer to the section about configuring HP Service Manager/Center in the *HP Release Control Installation and Configuration Guide*.

Managing CAB Decisions

You can post different types of notes regarding the approval/retraction process in the right section of the Collaborate > Resolution tab. To perform this procedure, you must be a user with the role of **Change Manager**.

To post a CAB Decision note:



- 1** In the CAB Decisions pane, click the **Add Decision** button and select the type of note you want to post:

- **CAB Minutes.** Details of relevant CAB discussions.
- **Pre-Implementation Guidelines.** Guidelines to follow before implementing a change. These guidelines appear in the director module in the alerts pane before a change request is scheduled.

- **Post-Implementation Guidelines.** Follow-up procedures after implementing a change. These guidelines appear in the director module in the alerts pane after a change request is scheduled.
- 2** Enter the subject and content of the note and click **Submit**. The note appears in the CAB Decision pane.

15

Reviewing Changes

The Review tab of the Details and Analysis pane allows you to create and review information for any request. You can create a Post Implementation Review (PIR), as well as view Event Log and Verification information.

This chapter includes:

- Reviewing Post Implementation Conclusions on page 161
- Reviewing the Change Request Implementation Event Log on page 164
- Reviewing Change Request Verification Information on page 165

Reviewing Post Implementation Conclusions

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, providing 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.

This section includes:

- “Creating/Editing a Post Implementation Review (PIR)” on page 162
- “PIR Email Options” on page 164
- “Defining a Review Filter” on page 164

Creating/Editing a Post Implementation Review (PIR)

You can create/edit a PIR for any change request with **Closed** status.

To create/edit a PIR:

- 1 In the Change Requests List View, select the request that you want to create/edit a PIR for.
- 2 In the Details and Analysis pane, click the **Review** tab and select **Conclusions**.
- 3 Click the **Review change** button. The Post Implementation Review window opens displaying the Details tab.



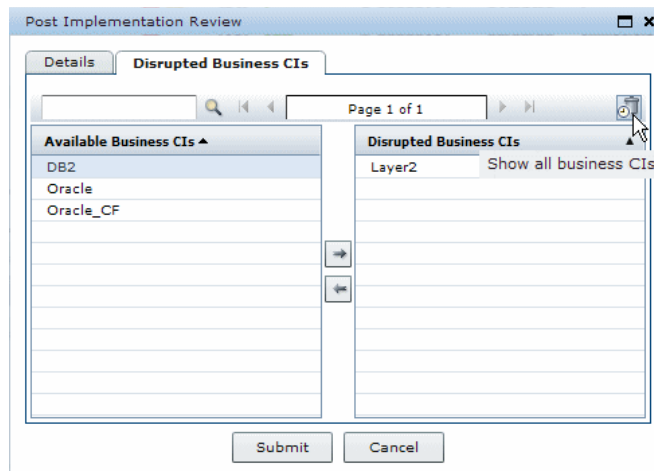
The screenshot shows a window titled "Post Implementation Review" with a close button in the top right corner. Inside the window, there are two tabs: "Details" (selected) and "Disrupted Business CIs". The "Details" tab contains the following fields:

- Review date:** A text box containing "04/28/08 03:50 PM" with a calendar icon to its right.
- Change outcome:** A dropdown menu with "Successful With Problems" selected.
- Planning satisfaction:** A dropdown menu with "Satisfied" selected.
- Customer satisfaction:** A dropdown menu with "Not Satisfied" selected.
- Review comment:** A text area containing the text "Change successful but with problems. Further investigation required."
- Service desk authentication:** A section with two input fields: "User:" and "Password:".

At the bottom of the window, there are two buttons: "Submit" and "Cancel".

- 4 Enter the Details tab information as follows:
 - **Review date.** Use the calendar to set the date and time for the review creation. The date and time of the first PIR creation is saved in the system and appears in future be default. If you are editing a PIR, we reccomend that you not change this.
 - **Change outcome.** Select the change request's outcome from the drop down list.
 - **Planning satisfaction.** Select the overall level of planning satisfaction for the request from the drop down list.

- **Customer satisfaction.** The customer is the person who opened the request ticket in the service desk application. Select the overall level of customer satisfaction for the request from the drop down list.
 - **Review comments.** You can add any comments that may be relevant.
 - **Service desk authentication.** If you are working with HP Service Manager, enter your username and password to update the PIR information directly to that application. This field does not appear if you are using any other service desk application.
- 5 On the Post Implementation Review window, click the Disrupted Business CIs tab.



By default, the **Available Business CIs** list displays a list of all business CIs that are impacted by the current request.

Alternatively, to view a list of all the relevant business CIs that HP Release Control recognizes in the HP Universal CMDB, click the **Show all business CIs** button.



You can filter the **Available Business CIs** list in the filter box above the list. The filter supports partial text entries.

You use the arrow buttons to select or deselect business CIs that were impacted by current request.

- 6 Click **Submit**. The PIR is added to the change request and all submitted PIR information appears under the **Conclusions** section of the Review tab.

PIR Email Options



The Change Reviewer can use the **Send by Email** button on the Change Requests toolbar to send an email invitation to participate in a PIR meeting, as well as a summary of the PIR conclusions for any completed request. For more information, see “Working with the Change Requests Toolbar” on page 59.

Defining a Review Filter

You can define a change request filter according to review-related criteria. For more information, see Chapter 3, “Filtering Change Requests, Activities, and Action Items.”

Reviewing the Change Request Implementation Event Log

The Event Log displays events related to activities. These can be user- or system-induced events.

User-induced events include:

- Updates to the status of an activity
- Changes to an activity's implementation schedule
- Alerts handled for an activity
- Notes submitted about an activity
- Similar changes added/confirmed/deleted
- Approval (or retraction of approval) of change requests
- Minutes or implementation guideline posted
- Management of Action Items
- Post Implementation Review updates
- Votes posted for a change request

System-induced events include:

- Alerts generated for an activity

- Processes on a change request, such as risk analysis, impact analysis, and collision analysis

The Event Log lists an event, the associated users, the event time, and the context. System-induced events are listed under the user name, **System**.

To view changes in the Event Log:

- In the Details and Analysis pane, click the **Review** tab and click **Change Log**.

Reviewing Change Request Verification Information

You can view information about detected changes in the **Verifications** section of the **Review** tab. For more information about detected changes, see Chapter 16, “Viewing Detected and Latent Changes.”

16

Viewing Detected and Latent Changes

By default, HP Release Control contains all the changes that are *scheduled* to take place in your environment. However, you can configure the HP Universal CMDB to periodically search for *actual* changes to your environment and send data about these changes to HP Release Control.

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

This chapter includes:

- Understanding Scheduled and Discovered Changes on page 168
- Viewing Detected Changes on page 168
- Viewing Latent Changes on page 169

Understanding Scheduled and Discovered Changes

You can use HP Release Control to view data for two types of changes:

- **Discovered changes.** Actual completed changes discovered in your environment by the HP Universal CMDB.
- **Scheduled changes.** All changes scheduled to take place in your environment that are contained in HP Release Control.

HP Release Control matches all **discovered changes** with **scheduled changes** according to certain criteria. Depending on how the changes match up, each discovered change is then classified as either a **detected change** or as a **latent change**.

Viewing Detected Changes

When a discovered change matches a scheduled change according to all of the matching criteria, HP Release Control defines the change as a **detected change**.

To view detected changes:

- 1** In the Change Requests List View, select the request that you want to view detected changes for.
- 2** In the Details and Analysis pane, click the **Review** tab and select **Verifications**. The selected request's detected changes are displayed along with information received from the HP Universal CMDB.

The **Verifications** section of the Review tab is divided into two panes:

- The Detected Changes pane
- The Changed Attributes pane

The Detected Changes pane displays the following information for each detected change:

- **CI Name.** The name of the CI that was changed.
- **CI Type.** The type of CI that was changed.
- **Change Type.** The type of change performed on the CI.
- **Detection Window.** The change detection time range when the detected change was discovered.

The Changed Attributes pane displays the following information for each detected change:

- **Attribute.** The specific aspect of the CI that was changed. For example the operating system (OS_VERSION).
- **Old Value.** The attribute's definition before the change. For example, XP SP1.
- **New Value.** The attribute's definition after the change. For example, XP SP2.

Viewing Latent Changes

When a detected changes does not match any scheduled change, or matches only according to some of the matching criteria, HP Release Control defines the change as a **latent change**.

Latent changes are displayed as separate changes in the Change Requests List View, along with all the other change requests. A latent change is indicated by the **Latent** icon and the words **Latent change** in the List view's **Summary** column.



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

Part III

Monitoring and Implementing Activities

17

Monitoring Activities

This chapter describes the Director module where you can monitor the status of change requests scheduled for implementation.

All users can view the Director module. If you are a **NOC user** (users who are assigned the NOC role) you can perform actions in this module. If you do not have NOC privileges, for example, a Release Manager or Change Manager, you can use this module to communicate with other users about change requests that interest you.

During the implementation stage, change requests are referred to as **activities**. In the Director module, you can observe events surrounding the activities, such as updates to the status of activities, problems that occur during implementation, and so on. If problems arise, you can take immediate action, ensuring that implementation runs as efficiently and with as little impact on the production environment as possible.

Note: This chapter is intended for NOC Users. That is, most of the actions described require NOC privileges.

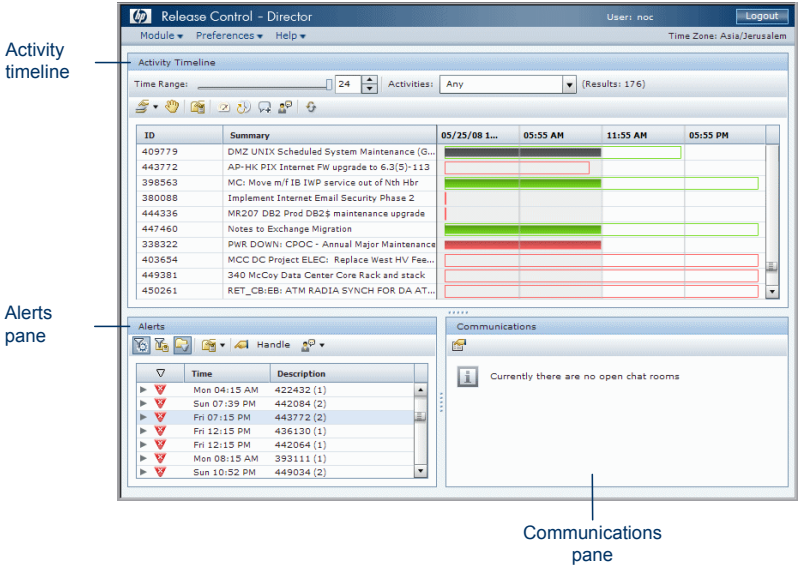
This chapter includes:

- Director at a Glance on page 174
- Viewing Activities on the Timeline on page 176
- Viewing Activity Information on page 178
- Updating Activity Status on page 185
- Adjusting Activity Schedules on page 186

- Activity Alerts on page 187
- Communicating with Other Users on page 191

Director at a Glance

You access the Director module from the **Module** menu. Select **Module > Director**.



The Director module displays the following:

- Activity Timeline
- Alerts Pane
- Communications Pane

Activity Timeline

The **Activity Timeline pane** lists activities scheduled within a selected time range, and their schedules are displayed graphically on a timeline. The graphical representation of the activity schedules indicates the status of the activity, that is, whether it has not yet started, has started, or is complete, and so on. If you modify an activity's schedule, this is indicated on the timeline.

For more information, see “Viewing Activities on the Timeline” on page 176.

Alerts Pane

In the **Alerts pane** you can view notifications about problems relating to the activities. Alerts also indicate warnings, or can simply be informative. For more information, see “Activity Alerts” on page 187.

Communications Pane

The **Communications pane** provides a medium where you can communicate with all other users that are involved in a particular activity or are interested in a particular topic. For more information, see Chapter 19, “User Communication.”

Refreshing the Timeline Display



HP Release Control automatically refreshes the Activity Timeline pane every minute. At any time, you can click the **Refresh Activity Timeline** button to refresh the display.

Viewing Activities on the Timeline

The **Activity Timeline** pane lists activities scheduled within a selected time range and their schedules are displayed graphically on a timeline. The graphical representation of an activity schedule indicates the status of the activity. If an activity’s schedule is modified, this is indicated on the timeline. For more information, see “Representation of Activities on the Timeline” below.

The timeline area is divided into a shaded area representing time in the past, and a non-shaded area representing time in the future. The vertical line dividing the past and future represents the current time. By default, the table displays activities scheduled up to 12 hours behind the current time and 12 hours ahead of the current time. You can change the time interval displayed on the timeline. For more information, see “Modifying the Time Display of the Timeline” on page 177.

You can filter the activities to view only those with certain criteria. For more information about filtering the list of activities, see Chapter 3, “Filtering Change Requests, Activities, and Action Items.”

Representation of Activities on the Timeline

The timeline displays activities in such a way that the you can immediately identify an activity’s planned schedule and the current status of the activity.

The **planned schedule** of an activity is represented by an empty horizontal bar, while the **actual implementation** period is represented by a solid bar.

For example, in the following image the planned schedule for Activity C00000221 is represented by an empty bar. The solid bar represents the actual implementation time. You can see that the implementation of the activity started at about 01:30 PM.

ID	Summary	04/15/08 11:57AM	01:12 PM	02:27 PM	03:42 PM
C-00000383	Please open port 443 between servers th...				
C-00000221	SOX Remediation and Validation/n of GCR...				

Downtime for an activity is indicated on the timeline by a solid dark gray bar. In the above example, downtime was started at about 02:15 PM.

The color of an activity on the timeline is determined by whether or not there are alerts for the activity, or if it has finished implementation.

- If there are no alerts for the activity, the activity is displayed in green.
- If there are alerts for the activity, the activity is displayed in red, yellow, or blue, according to the alert for the activity with the highest severity. For more information about activity alerts, see “Activity Alerts” on page 187.
- If the implementation of an activity is complete, the activity is displayed in gray.

Modifying the Time Display of the Timeline

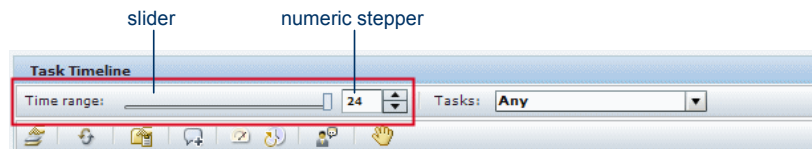
The timeline is divided into four equal parts where, by default, half of the time displayed is in the past, represented by a shaded area, and half of the time is in the future, represented by the non-shaded area. The current time is represented by the vertical line separating the past and the future.

You can modify the time range displayed on the timeline, and the time amount of past/future time displayed.

Note: When you modify the timeline display, the activities displayed are updated accordingly.

To modify the time range displayed on the timeline:

- Drag the **Time Range** slider left or right, or use the numeric stepper to select the number of hours to display. You can select a time range of between one and 24 hours. By default, a 24-hour time range is displayed.

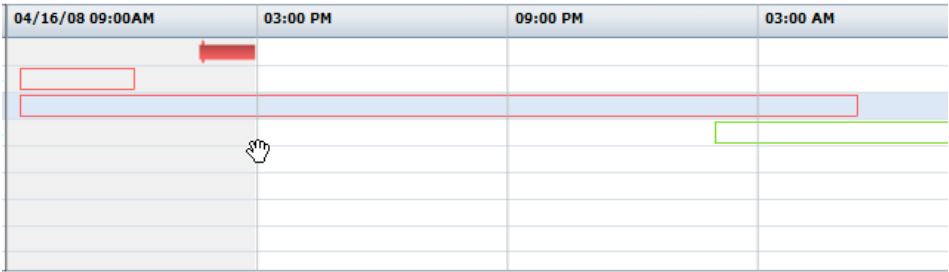


The activities displayed are updated according to the selected time range.

To modify the amount of past and future time displayed:



- 1 On the Activity Timeline toolbar, click the **Drag Mode** button. The cursor turns into a hand when you hold it over the timeline area.
- 2 Drag the timeline area to the left to display more time in the future, or to the right to display more time in the past.



The activities displayed are updated according to the new time range displayed.



- 3 To revert back to the regular cursor, click the **Cursor Mode** button.

Viewing Activity Information

You can view information about each activity in the Activity Information dialog box. The information provided comprises all the details about the activity. It also displays pre- or post-implementation guidelines, and any events related to the activity, for example, if the activity was rescheduled, if the status was updated, and so on.

To view activity information:



- 1 In the Activity Timeline pane, select an activity and click the **Activity Information** button.

Note: This button is also available in the Alerts pane.

The Activity Information dialog box opens displaying the following tabs:

- **Details.** Displays details about the activity, including its impact and risk levels, implementation details, and so on. For more information, see “Activity Details” below.
 - **Implementation Guidelines.** Displays CAB-assigned guidelines to follow before and/or after implementing the activity.
 - **Event Log.** Displays all events related to the activity. For more information, see “Event Log” on page 181.
 - **CI KPIs.** Displays KPIs (Key Performance Indicators) for the CIs impacted by the activity. This feature is available if HP Release Control is integrated with HP Business Availability Center 8.x. For more information, see “Viewing Key Performance Indicators (KPIs) for CIs” on page 182.
- 2** To submit information or comments about an activity, see “Submitting Notes About Activities” on page 183.
 - 3** To view additional layers of information on the timeline, see “Viewing Additional Activity Information on the Timeline” on page 183.
 - 4** To view the activity in the Analysis module, click **View in Analysis**.

Activity Details

The Activity Information > Details tab displays the following details about an activity:

Detail	Description
Actual End	The date and time at which implementation of the activity actually ended
Actual Start	The date and time at which implementation of the activity actually started
Change Type	The type of change (for example, planned or automated)
Contact Location	The geographic location of the person responsible for the activity
Contact Person	The name of the user responsible for the activity
Created	The date and time at which the activity was originally created in the service desk application

Description	A description of the activity
Estimated Risk	The estimated risk level that was assigned to the activity by a user
Impact Severity	The impact severity level of the activity, as calculated by HP Release Control
Implementors	The people responsible for implementing the activity
Last Impact	The time at which an impact analysis was last calculated
Last Update	The last time the activity was updated in the service desk application
NOC Planned End	The date and time that the activity implementation is scheduled to end, as rescheduled by the NOC users
NOC Planned Start	The date and time that the activity implementation is scheduled to start, as rescheduled by the NOC users
Planned End	The date and time that the activity implementation is scheduled to end
Planned Start	The date and time that the activity implementation is scheduled to start
Priority	The priority level of the activity
Request ID	The reference ID number of the activity in the service desk application
Risk	A number from 0 – 100 that indicates the risk level of this activity relative to the other activities, as calculated by HP Release Control
Service Desk	The service desk application in which the activity originated

Event Log



To access the Event Log, select an activity in the Activity Timeline pane and click the **Activity Information** button, and select the **Event Log** tab.

The Event Log displays events related to activities. These can be user- or system-induced events.

User-induced events include:

- Updates to the status of an activity
- Changes to an activity's implementation schedule
- Alerts handled for an activity
- Notes submitted about an activity
- Similar changes added/confirmed/deleted
- Approval (or retraction of approval) of change requests
- Minutes or implementation guideline posted
- Management of Action Items
- Post Implementation Review updates
- Votes posted for a change request

System-induced events include:

- Alerts generated for an activity
- Processes on a change request, such as risk analysis, impact analysis, and collision analysis



The Event Log lists an event, the associated users, the event time, and the context. System-induced events are listed under the user name, **System**.

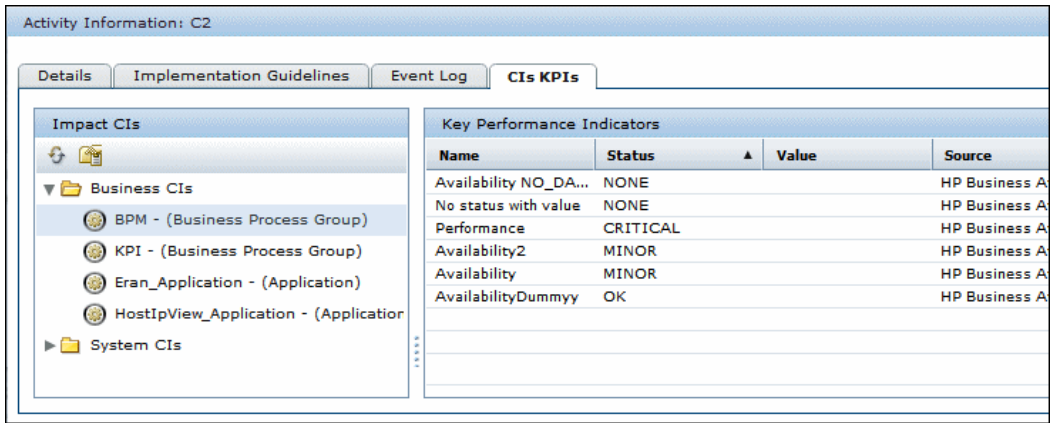
Viewing Key Performance Indicators (KPIs) for CIs

If HP Release Control is integrated with HP Business Availability Center 8.x, you can view Key Performance Indicators (KPIs) for the CIs impacted by the selected activity. To view the CI KPIs, HP Business Availability Center needs to be running.

For information about configuring this feature, refer to the chapter about configuring KPI viewing in the *HP Release Control Installation and Configuration Guide*.

You can access the CI KPIs tab in the Director module as follows:

- 
- Select an activity in the Activity Timeline pane and click the **KPIs for Activity CIs** button.
- 
- Select an activity in the Activity Timeline pane, click the **Activity Information** button, and select the **CI KPIs** tab.



When you select one of the Impact CIs in the **Impact CIs** pane, the following KPI details are displayed in the **Key Performance Indicators** pane:

- **Name.** The type of KPI.
- **Status.** The status of the KPI.
- **Value.** If no status is available, the value of the KPI is displayed. The unit of the value is displayed in parenthesis.

➤ **Source.** The application that provides the KPI information.

Submitting Notes About Activities

If you have any information or comments to submit about an activity, you can post notes to the Event Log.

To add a note:



- 1 Select the activity you have comments about, and click the **Submit Note to Event Log** button. The Notes for Activity <ID> dialog box opens.
- 2 Enter your note and click **Submit**. The note is submitted to the Event Log.

Viewing Additional Activity Information on the Timeline

The timeline displays the activities and their schedules. You view additional information by adding layers of information to the timeline.

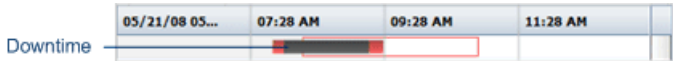
To view additional activity information on the timeline:



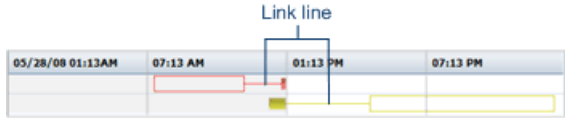
- On the Activity Timeline toolbar, click the **View Layer** button and select the layer of information you want to display.

You can display the following layers of information—one at a time, or simultaneously:

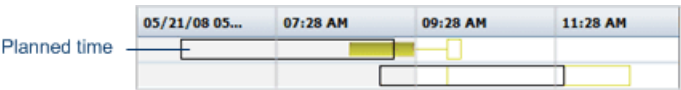
- **Downtime.** Intervals of downtime on CIs during activity implementation. Downtime is represented by a solid, dark gray bar.



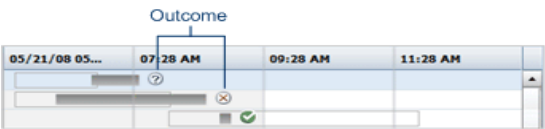
- **Link Line.** When an activity's planned and actual implementation schedules do not overlap, a thin line links the two schedules.



- **Planned Time.** The original implementation schedule for the activity defined by the CAB, represented by an empty bar with a black border.



- **Implementation Outcome.** For activities that have ended, you can view the implementation outcomes on the timeline.



Icon	Outcome	Description
	Successful	The implementation was successful
	Successful with problems	The implementation was successful but you encountered some problems
	Failed	The implementation failed
	Cancelled	The activity was cancelled
	Unknown	The outcome is unknown

Updating Activity Status

If an implementor is unable to update the activity status directly, you can update the status on the implementor's behalf.

To update an activity's status:

- 1 Select the activity in the timeline.



- 2 Click the **Update Activity Status** button. The Update Activity Status dialog box opens.



- 3 Under **Status**, click the calendar button adjacent to the relevant status, select the date and time (current or in the past) that the status was updated, and click **OK**. The possible activity statuses are:

- **Actual start.** The date and time that the activity started.
- **Downtime start.** The date and time that downtime started.
- **Downtime end.** The date and time that downtime ended.
- **Actual end.** The date and time that the activity ended.

Note: The activity statuses are inter-related.

- You must update **Actual start** before you can update **Downtime start/end** or **Actual end**.
 - You must update **Downtime start** before you can update **Downtime end**.
 - If you update **Downtime start**, you must first update **Downtime end** before you can update **Actual end**.
-

- 4 If you are updating **Actual end**, the **Outcome** box is enabled. Select one of the following activity outcomes:
 - **Successful.** Indicates that the activity was successful.
 - **Successful with Problems.** Indicates that overall the activity was successful, but had some problems.
 - **Failed.** Indicates that the activity failed.

- **Cancelled.** Indicates that the activity was cancelled.
- **Unknown.** Indicates that the activity outcome is unknown.

5 (Optional) In the **Notes** box, add notes about the status update.

6 (Optional) In the **On behalf of** box, select the activity implementor by choosing the name of the implementor from the drop-down menu or by clicking the **Select Implementor** button and selecting a name from the list that appears.



7 Click **OK**.

To clear an activity's status:



1 Click the **Update Activity Status** button. The Update Activity Status dialog box opens.



2 Click the **Clear** button to clear the current status.

Adjusting Activity Schedules

You can reschedule an activity to start or end earlier or later than the original CAB planned schedule.

Note: You can reschedule an activity to start up to 12 hours earlier than the original CAB planned start time, and end up to 12 hours later than the original CAB planned end time.

To change an activity's schedule:



1 Select the activity in the timeline, and click the **Reschedule Activity** button. The Reschedule Activity dialog box opens.



2 Click the calendar button next to **Start time** and/or **End time** and select a new date and time.

3 Click **OK**. The updated schedule is displayed on the timeline, and the event is logged in the Event Log.



To view both the updated schedule and the original CAB planned schedule on the timeline, click the **View Layers** button and select **Planned Time**.

Activity Alerts

The Alerts pane of the Director module displays alerts about activities displayed on the timeline. These alerts notify you about problems detected regarding the listed activities, prompting you to take action where necessary.

Alerts can indicate errors or warnings, or can simply be informative. They are generated under any of the following circumstances:

- An activity started earlier than scheduled
- An activity is likely to start late or started late
- An activity is likely to end late or ended late
- An activity breached a Time Period without approval from the CAB
- An activity has pre- or post-implementation guidelines
- An activity is likely to collide or collides with another activity without approval from the CAB
- An implementor is calling for assistance
- An emergency activity was added
- An activity's details were modified

This section includes:

- “Alert Indicators” on page 188
- “Alert Display Options” on page 188
- “Handling Alerts” on page 190

Alert Indicators

The Alerts pane displays alerts and the time at which they were generated. The icon displayed alongside each alert indicates the severity of the alert and the alert's status.

An alert icon can be:



- Red, indicating an error



- Yellow, indicating a warning



- Blue, indicating a notification

Alerts can have one of the following statuses:



- **Open.** Alert is active.



- **Dismissed.** Alert was acknowledged and removed from the Alerts view.



- **In reminder mode.** The alert is in reminder mode.

Alert Display Options

You view alerts in the Alerts pane. By default, the Alerts pane displays only open alerts. You can select any of the following view options:

- Show Open Alerts Only (Default)
- Synchronize with Selected Activity
- Group by Activity

Show Open Alerts Only (Default)

You can choose to display only the open alerts. This view hides dismissed alerts and alerts in reminder mode.

To display only the open alerts:



- In the Alerts pane, click the **Show Open Alerts Only** button. Only the open alerts are displayed.

Synchronize with Selected Activity

You can synchronize the alerts to view only the alerts associated with a particular activity.

To view alerts for a particular activity:

- 1 Select an activity on the timeline.
- 2 In the Alerts pane, click the **Synchronize with Selected Activity** button.



The Alerts pane displays all the alerts that are associated with the selected activity.

Note: To view only the open alerts for the activity, click the **Show Open Alerts Only** button.



Group by Activity

You can group alerts in the Alerts pane by activity.

To group alerts by activity:










- 1 In the Alerts pane, click the **Group by Activity** button.



The alerts are grouped by activity, indicated by a bullet adjacent to the alert's icon. The activity ID is displayed in the **Description** column. The number in parentheses next to the activity ID indicates the number of alerts for the activity. The color of the alert icon is determined by the activity's most severe alert.

	Time	Description
	Mon 03:33 PM	T-00000131 (2)

2 Click the bullet to expand the activity's alerts.

	Time	Description
	Mon 05:04 PM	Alona_3 (2)
	Mon 05:04 PM	Alona_3 which was planned to start at: Mon 04:30 AM is late to start
	Mon 05:04 PM	Emergency Alona_3 was inserted
	Mon 04:59 PM	2000 (4)
	Mon 04:59 PM	Collision detected between 2000 and 3000 on Implementor, DAB/DAB
	Mon 04:58 PM	2000 which was planned to start at: Mon 07:30 AM has started early
	Mon 05:11 PM	2000 has pre-implementation CAB guidelines
	Mon 03:51 PM	Emergency 2000 was inserted

Note: To view only the open alerts for each activity, click the **Show Open Alerts Only** button.



Handling Alerts

When an alert is generated, you can select how to handle it. You can:

- Request an alert reminder
- Dismiss the alert
- Reopen a dismissed alert or an alert in reminder mode

To handle an alert:

1 Select the alert in the Alerts pane.



2 Click the **Handle Alert** button. The Handle Alert dialog box opens.

- To request an alert reminder, select **Remind me again in:** and, in the drop down list, select when to activate the reminder.
- To dismiss the alert, select **Dismiss alert and reopen only if alert's severity increases**. If the severity of this alert increases, the alert will reopen with a higher severity. For example, if an alert is about to collide with another alert, a warning alert (yellow) is generated. If, after you dismiss this alert, the activities do collide, the alert reopens as an error alert (red).

3 (Optional) In the **Notes** box, add notes about the alert.

4 Click **Submit**.

To reopen an alert:

1 Ensure that the **Show Open Alerts Only** button is not selected.

2 Select the alert that you want to reopen.



3 Click the **Handle Alert** button. The Handle Alert dialog box opens.

4 Select **Reopen alert**.

5 (Optional) In the **Notes** box, add notes about the alert.

6 Click **Submit**. A regular alert icon appears next to the alert, indicating that it is open.

Communicating with Other Users

The Communications pane is a medium through which you can communicate with other users. This way you can convey information to one another regarding common activities with which you are associated. You can also hold topic-related discussions with other users.

For more information, see Chapter 19, “User Communication.”

18

Implementing Activities

As an implementor, you can manage the activities assigned to you from the Implementor module. You can view activity information and update the status of activities you are working on. In turn, the NOC users are notified of the current status of the activity.

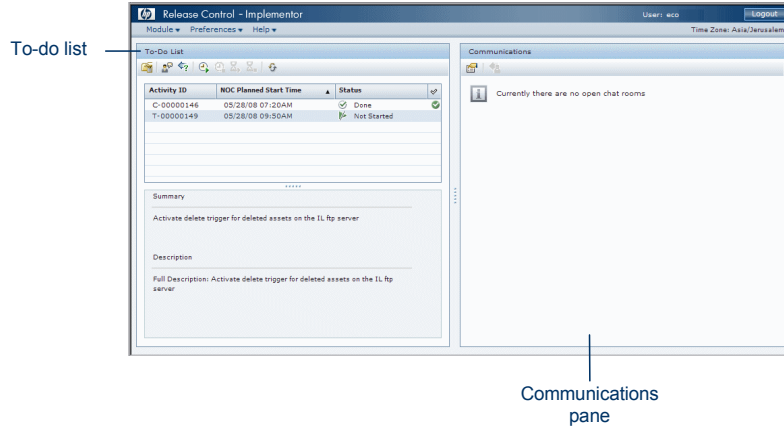
From the Implementor module, you can communicate with other implementors assigned the same activity, as well as with NOC and other users involved in the activity.

This chapter includes:

- Implementor Module at a Glance on page 194
- Managing Activity Implementation on page 195
- Communicating with Other Users on page 197

Implementor Module at a Glance

You access the Implementor module from the **Module** menu. Select **Module > Implementor**.



The Implementor module is divided into the following areas:

To-Do List

The To-do list displays the activities assigned to you over the current 24-hour period, that is, over the last 12 hours and over the next 12 hours. It displays the scheduled start times of the activities, as well as their summaries and descriptions. As implementation proceeds, the activity status and implementation outcome are updated here. You can also view the activity information from the To-do list. For information about managing activities listed in the To-do list, see “Managing Activity Implementation” on page 195.

Communications Pane

You use the Communications pane to communicate with fellow implementors, the NOC users, and other users. For more information, see Chapter 19, “User Communication.”

Managing Activity Implementation

The Implementor module lists the activities assigned to you over the current 24-hour period, that is, over the last 12 hours and over the next 12 hours, sorted by their scheduled start times.












The current status of each activity is displayed in the To-do list. As you progress through the implementation, you update the status of the activity. When implementation is complete, you can update the implementation outcome.

Updating the Activity Status

Before implementation begins, the activity status is **Not started**. When you start implementation and update the status, the Director module is automatically updated as well. This enables the NOC users to follow the progress of the implementation, and assist where necessary.

To update the activity status in the Implementor module:

- 1 Select the activity you want to update. The buttons enabled on the To-do list toolbar depend on the status currently displayed. (See table below.)
- 2 Click the appropriate button to update the activity status. The status is updated as follows:

Current displayed status	Button enabled	Updated Status
 Not Started	 Report Activity as Started	 Started
 Started	 Report Activity as Finished	 Done
	 Report Start of Downtime	 Down
 Down	 Report End of Downtime	 Started

Requesting NOC Assistance

If you are an implementor you can submit a message to the NOC users requesting assistance for a certain activity. The message is conveyed in the Director module in the form of a high severity alert noting that you are in need of assistance.

To request assistance:






- 1 In the Implementor module, select the activity for which you need assistance.
- 2 On the To-do List toolbar, click the **Request NOC Assistance** button. The NOC Assistance Request dialog box opens.
- 3 Enter your request and click **OK**. The request is sent to the Director module where it is displayed as an alert with high severity.



	Time	Description
▼	Mon 05:56 PM	Implementor q q for change 446986 needs assistance; Please join chat rom for this activity
▼	Mon 01:54 AM	Emergency 450675 was inserted
▼	Sun 08:00 PM	Emergency 450261 was inserted
▼	Sun 07:47 PM	Emergency 449866 was inserted
▼	Mon 01:54 AM	450675 which was planned to start at: Tue 05:00 PM is late to start
▼	Sun 08:00 PM	450261 which was planned to start at: Sat 04:00 PM is late to start
▼	Fri 05:15 PM	449119 which was planned to start at: Fri 05:00 PM is late to start

Reporting Activity Outcome

When you select **Report Activity as Finished**, a dialog box opens prompting you for the implementation outcome:

Icon	Outcome	Description
	Successful	The implementation was successful
	Successful with problems	The implementation was successful but you encountered some problems
	Failed	The implementation failed
	Cancelled	The activity was cancelled
	Unknown	The outcome is unknown



Select the outcome, enter your comments about the outcome of the activity, and click **OK**. The status changes to **Done**, and the **Outcome** column is updated with the relevant icon.

Communicating with Other Users

The Communications pane is a medium through which you can communicate with fellow implementors, NOC users, and other users. This way you can convey and obtain information from one another regarding common activities with which you are associated. You can also hold topic-related discussions with other users.

For more information, see Chapter 19, “User Communication.”

19

User Communication

This chapter describes the Communications pane, through which you can communicate with other users to convey or obtain information regarding the common activities with which you are associated, or regarding other topics.

Implementors communicate from the Implementor module. Director module users, such as NOC users, Release Managers, and Change Managers, communicate from the Director module.

This chapter includes:

- Activity Chat Rooms on page 200
- Custom Chat Rooms on page 202
- Participating in Multiple Chat Rooms on page 203

Activity Chat Rooms

If you are a NOC user, when you start a chat session, all users who are associated with that activity, and who are online, are alerted to the chat session.

If you are an implementor or other non-NOC user, all non-NOC users who are associated with the activity, and who are online, are alerted to the chat session. To involve NOC users in an activity chat session, you need to force their participation.

Note: Users are **online** when they have opened the Director or Implementor module.

To start an activity chat session:

- 1 Select the activity about which you want chat.



- 2 Click the **Open Activity Chat Room** button.

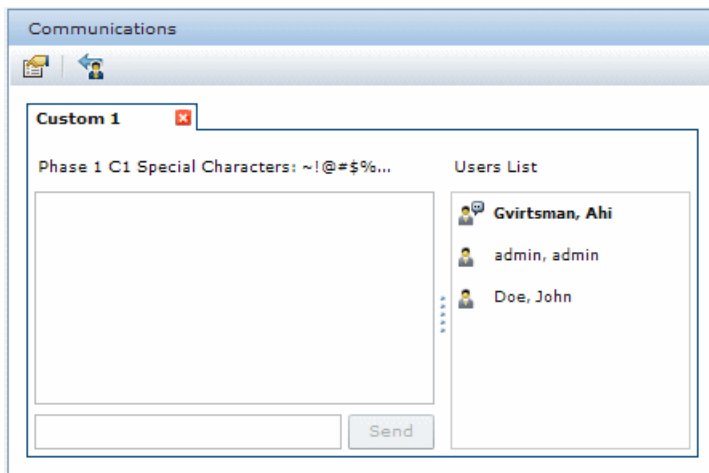
- In the Director module this button is located on the Activity Timeline toolbar and on the Alerts pane toolbar.
- In the Implementor module this button is located on the To-do list toolbar.

A chat room window opens in your Communications pane.

- The chat room window tab is named according to the activity ID.
- The User List displays all the users associated with the activity in any way, who are online.



- Users displayed in regular font are online but not in the chat room.
- Users displayed in bold font are in the chat room.



- 3 Type a message in the box adjacent to the **Send** button, and click **Send**.

If you are a NOC user, all the users listed are automatically forced to participate in the chat session.

- Chat room windows open in each user's Communications pane.
- All users in the User List appear in bold text, indicating that they are in the room.

If you are an implementor or other non-NOC user, NOC users are not automatically forced to participate the chat session. They continue to appear online, until they join the room on their own accord. Alternatively, you can force them to participate in the chat room by clicking the **Force NOC Intervention** button in the Communications pane. The next message you send opens a chat room window in the NOC users' Communications panes as well.



Throughout the chat session, automated messages indicate when users come online and go offline, and when they join and leave the chat room.

To leave a chat room:

- Hold the cursor over the chat room tab in the Communications pane and click the **Close** button.

Custom Chat Rooms

You can create **custom chat rooms** where you can hold discussions about general issues. For example, you can create chat rooms where database administrators can hold discussions, or where implementors can discuss general issues about activities they are implementing.

Managing Custom Chat Rooms

You create and delete custom chat rooms from the Communications pane. When you create a chat room, you are its owner. Anyone can join the chat room. Only you, the owner, can delete it.

To create a custom chat room:



- 1** In the Communications pane, click the **Manage Chat Rooms** button. The Manage Chat Rooms dialog box opens.



- 2** Click the **Add Chat Room** button, enter a name for the new chat room, and click **Add**. The chat room is added to the list of rooms, listing you as its owner.

- 3** Click **Done** to close the Manage Chat Rooms dialog box.

To delete a custom chat room:



- 1** In the Communications pane, click the **Manage Chat Rooms** button. The Manage Chat Rooms dialog box opens.

- 2** Select the chat room you want to delete.

Note: You can only delete chat rooms that you own.



3 Click the **Delete Chat Room** button. The chat room is deleted from the list of rooms.

4 Click **Done** to close the Manage Chat Rooms dialog box.

Joining/Leaving Custom Chat Rooms

You can join any custom chat room listed in the Manage Chat Rooms dialog box, and leave.

To join a chat room:



1 In the Communications pane, click the **Manage Chat Rooms** button. The Manage Chat Rooms dialog box opens.



2 Select the chat room you want to join, and click the **Join Chat Room** button.

A chat room window opens in your Communications pane. Other users in the chat room appear in the **User List**.

3 Click **Done** to close the Manage Chat Rooms dialog box.

To leave the custom chat room:

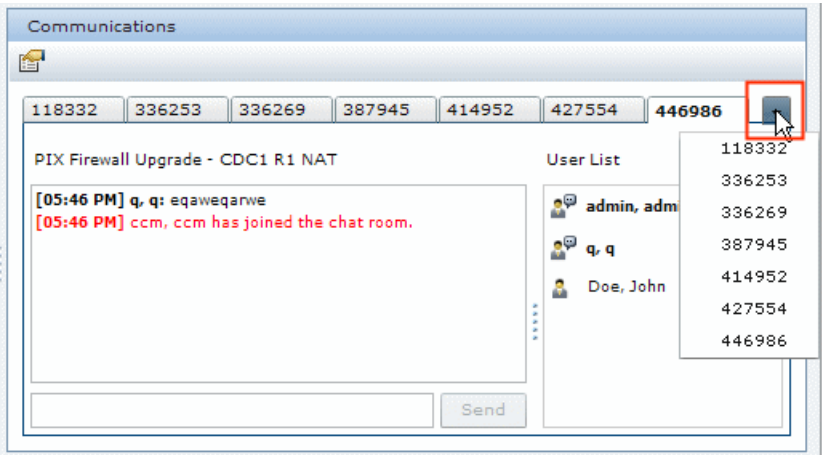
- Hold the cursor over the chat room tab in the Communications pane, and click the **Close** button.

Participating in Multiple Chat Rooms

You can participate in many chat rooms at a time, enabling you to discuss different issues with relevant fellow users. Chat room windows are named according to the topic in discussion.

To see all the chat rooms in which you are participating, click the down arrow on the right side of the Communications pane. A list of chat rooms is displayed.

To move to a chat room, select the chat room from the list.



Part IV

Dashboard

20

Working with the Dashboard

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

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

This chapter includes:

- Viewing the Default Portlets on page 208
- Trends Portlets on page 209
- Analysis Portlets on page 212
- Post Implementation Portlets on page 218
- Working with Dashboard Pages on page 222
- Personalizing the Dashboard on page 223

Viewing the Default Portlets

To open the Dashboard, select **Module > Dashboard**. The Dashboard opens displaying the Home tab.

The portlets displayed in the Home tab provide change request information based on Trends, Analysis, and Post Implementation. By default, the Trends portlets are displayed.

To display a different set of portlets, click **Switch to page**, then select **Release Control Default Module** and the desired portlets.



To maximize a portlet, click the **Maximize** button in the upper right hand corner of the portlet. A magnified view of the portlet is displayed on a page by itself. To return to the original view, click **Back**.

Note:

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

Trends Portlets

The default Trends portlets display information relating to change requests shown over time. The following portlets are displayed:

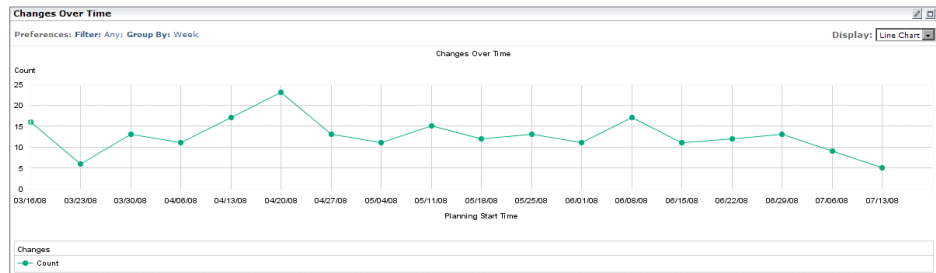
- Changes Over Time Portlet – for details, see page 209
- Abnormal Changes Over Time Portlet – for details, see page 210
- Latent Changes Over Time Portlet – for details, see page 210

By default, the Trends portlets are displayed in line chart format. To display the same information as a list, select **List** from the **Display** drop down list in the upper right hand corner of each portlet.

For information on modifying the display preferences of the Trends portlets, see “Modifying the Trend Portlets Display Preferences” on page 211.

Changes Over Time Portlet

The Changes Over Time portlet displays the upward or downward movement in the number of overall change requests, measured at one week intervals.



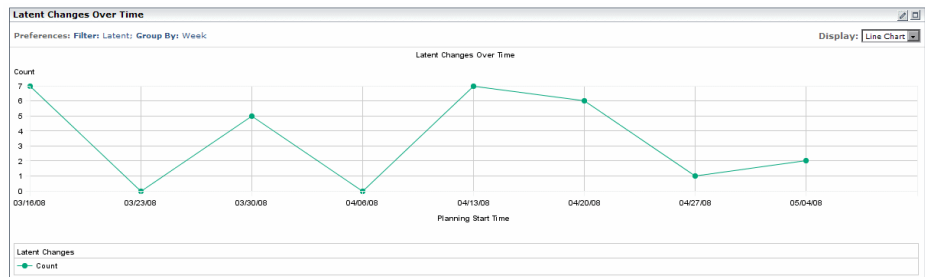
Abnormal Changes Over Time Portlet

The Abnormal Changes Over Time portlet displays the upward or downward movement in the number of abnormal change requests, measured at one week intervals.



Latent Changes Over Time Portlet

The Latent Over Time portlet displays the upward or downward movement in the number of latent change requests, measured at one week intervals.



Modifying the Trend Portlets Display Preferences

You can modify the Trend portlets display preferences only after the portlets have been copied to your list of personal Dashboard pages.

To modify display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Changes Over Time portlet.
 - **Filter.** You can select which category of change requests to include in the portlet. The options that appear here are the same as the filter options in the Analysis module.
 - **Group by.** You can choose to show movement in the number of changes over daily, weekly, montly or yearly intervals.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

Analysis Portlets

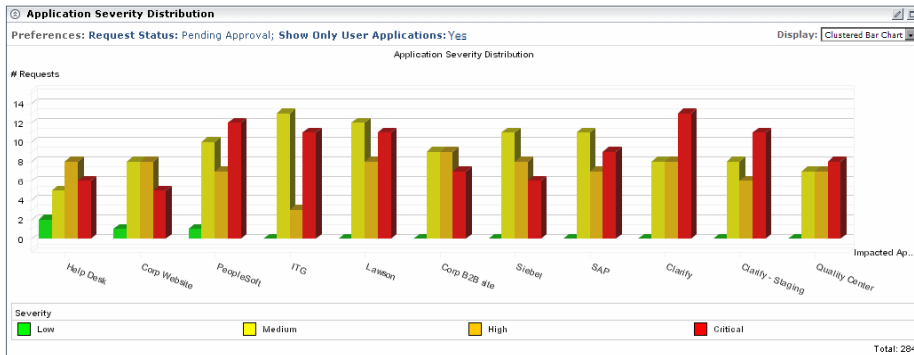
The default Analysis portlets display analysis information relating to change requests. The following portlets are displayed:

- Application Severity Distribution Portlet – for details, see page 212
- Application Status Distribution Portlet – for details, see page 214
- Change Request Impact Analysis Ratio Portlet – for details, see page 216

By default, the Analysis portlets are displayed as clustered bar charts. To display the same information as either a pie chart or a list, select the desired option from the **Display** drop down list in the upper right hand corner of each portlet.

Application Severity Distribution Portlet

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



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

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

Modifying the Display Preferences

You can modify the Application Severity Distribution portlet display preferences only after the portlet has been copied to your list of personal Dashboard pages.

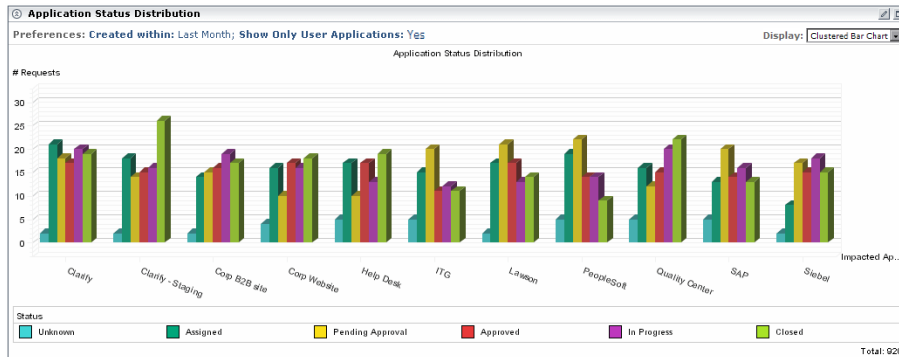
To modify the display preferences:



- 1 Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Application Severity Distribution portlet.
 - **Show Only User Applications.** You can modify the default option whereby data is displayed only for those applications associated with the current user. (You associate applications with the current user in the User Settings dialog box. For details, see “Associating Business CIs with the Current User” on page 24.) To display data for all IT applications affected by the change requests that HP Release Control processes, select **No** under **Show Only User Applications**.
 - **Request Status.** You can modify the default option whereby data is displayed only for requests with the status **Pending Approval**. To display data for requests with a different status, select the required status from the **Request Status** selection box.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2 Click **Done** to save your preference settings and return to the default Dashboard page.

Application Status Distribution Portlet

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



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

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

Modifying the Display Preferences

You can modify the Application Status Distribution portlet display preferences only after the portlet has been copied to your list of personal Dashboard pages.

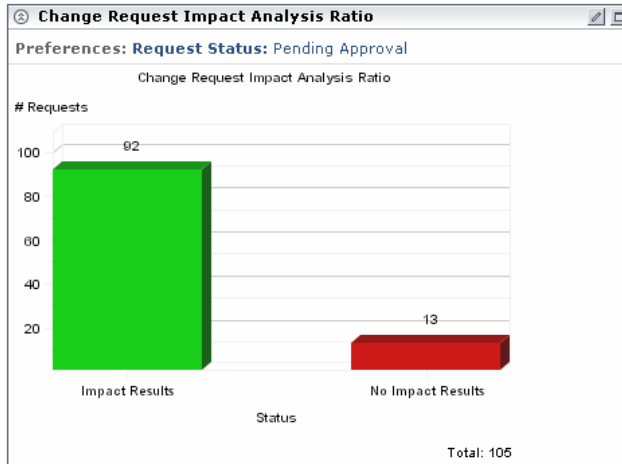
To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Application Status Distribution portlet.
 - **Created Within.** You can choose to display data for change requests that were created within a time frame other than the default one, **Last Month**. To display data for change requests created within a different time frame, select **Last Week** or **Last Two Weeks** from the **Created Within** selection box.
 - **Show Only User Applications.** You can modify the default option whereby data is displayed only for those applications associated with the current user. (You associate applications with the current user in the User Settings dialog box. For details, see “Associating Business CIs with the Current User” on page 24.) To display data for all IT applications affected by the change requests that HP Release Control processes, select **No** under **Show Only User Applications**.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

Change Request Impact Analysis Ratio Portlet

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



For example, the above graph shows the following:

- Impact analysis results were available for 92 Pending Approval change requests.
- No Impact analysis results were found for 13 Pending Approval change requests.

Modifying the Display Preferences

You can modify the Change Request Impact Analysis Ratio portlet display preferences only after the portlet has been copied to your list of personal Dashboard pages.

To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Change Request Impact Analysis Ratio portlet.
 - **Request Status.** You can modify the default option whereby data is displayed only for requests with the status **Pending Approval**. To display data for requests with a different status, select the required status from the **Request Status** selection box.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

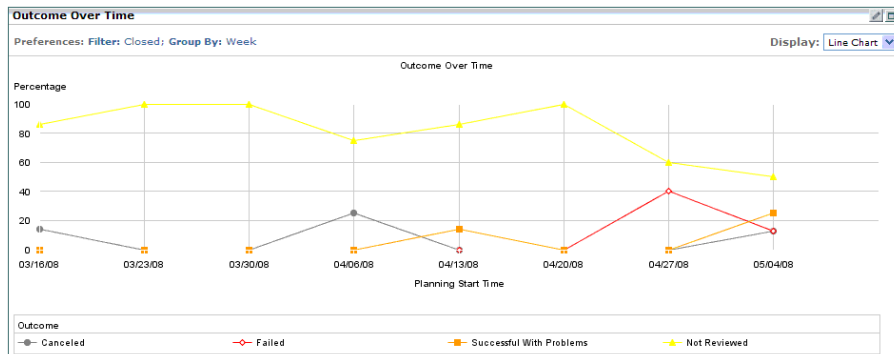
Post Implementation Portlets

The default Post Implementation portlets display information relating to completed change requests. The following portlets are displayed:

- Outcome Over Time Portlet – for details, see page 218
- Outcome Grouped By Risk Portlet – for details, see page 220

Outcome Over Time Portlet

The Outcome Over Time portlet displays the upward or downward movement in the percentage of each change outcome, measured at one week intervals.



By default, the portlet is displayed in line chart format. To display the same information as a list, select **List** from the **Display** box in the upper right hand corner of the portlet.

Modifying the Display Preferences

You can modify the Outcome Over Time portlet display preferences only after the portlet has been copied to your list of personal Dashboard pages.

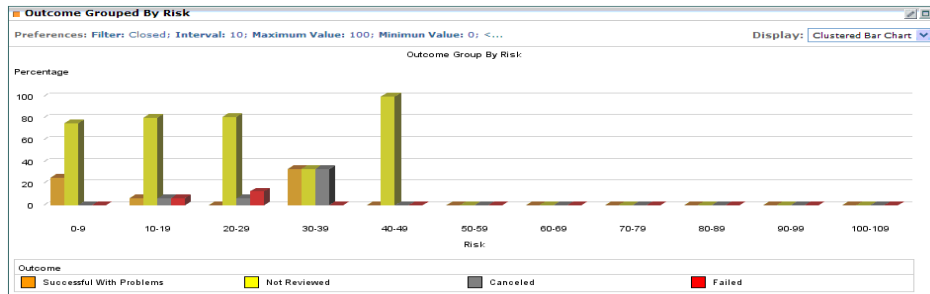
To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Changes Over Time portlet.
 - **Filter.** You can select which category of change requests to include in the portlet. The options that appear here are the same as the filter options in the Analysis module.
 - **Group by.** You can choose to show movement in the percentage of the different change outcomes over daily, weekly, monthly or yearly intervals.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

Outcome Grouped By Risk Portlet

The Outcome Grouped By Risk portlet displays the percentage of change requests with specific outcomes, grouped within intervals of calculated risk values.



For example, the above portlet shows that for completed change requests that had a risk value between 0 and 9:

- 22% have the outcome **Successful With Problems**
- 78% have the outcome **Not Reviewed**
- None have the outcome **Cancelled**
- None have the outcome **Failed**

By default, the portlet is displayed as a clustered bar chart. To display the same information as a stacked bar chart or a list, select the desired option from the **Display** drop down list in the upper right hand corner of the portlet.

Modifying the Display Preferences

You can modify the Outcome Grouped by Risk portlet display preferences only after the portlet has been copied to your list of personal Dashboard pages.






To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Changes Over Time portlet.
 - **Filter.** You can select which category of change requests to include in the portlet.
 - **Numeric Type.** You can choose to view change outcomes according to any numeric field as defined in your system settings.
 - **Minimum Value.** The lowest value of the numeric type to include in the portlet.
 - **Maximum Value.** The highest value of the numeric type to include in the portlet.
 - **Interval.** You can define at which numeric intervals to group the change requests.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

Working with Dashboard Pages

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

Button	Description
	The Favorites button enables you to add the current page to your favorites, or to open the Manage Favorites page.
	The View Module Comments button enables you to view the comments that the administrator entered for the current module (available only if the page is public and is part of a module defined by the administrator).
	The Page Rotation button enables you to determine the refresh rate for the current page.
	The Export Dashboard Page to PDF button enables you to create a PDF containing the data on the current page.
	The Personalize button enables you to open the Personalize screen and personalize the Dashboard. Clicking this button opens the current portlet for editing. For details, see “Personalizing the Dashboard” below.

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

Personalizing the Dashboard

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

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

This section describes:

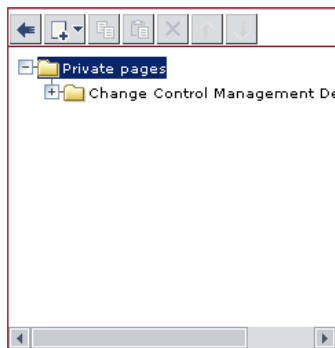
- “Adding Groups” below
- “Adding Pages” on page 224
- “Copying Pages” on page 225
- “Modifying Pages” on page 225
- “Adding Portlets” on page 226
- “Managing Portlets” on page 228

Adding Groups

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

To add a group:

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





- 2 Click the **Add** button and select **New Group**. A new group is added to the Dashboard page tree.
- 3 In the Edit Group pane on the right, enter a name for the new group and a brief description of the group. The new group is renamed in the Dashboard page tree.

Adding Pages

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

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

To add a new page to the Dashboard page tree:

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



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

After creating the page, you can populate it with portlets. For more information, see “Adding Portlets” on page 226.

To add a preconfigured page to the Dashboard page tree:

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



- 2 Click the **Add** button and select **Add Preconfigured Pages**. The Add Preconfigured Pages dialog box is displayed in the right pane.

- 3 Select the check box to the left of the modules whose pages you want to add to the Dashboard page tree. Each module you select is added as a group in the tree. The module's pages appear under the group created for the module.

Copying Pages

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

To copy a module or page:

- 1 Select the module or page you want to copy (either in the Dashboard page tree or under **Shared pages**) and click the **Copy** button.
- 2 In the Dashboard page tree, select **Private pages** or the group under which you want to place the copied module or page, and click the **Paste** button. The module or page is copied to the selected location.



Modifying Pages

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

To modify a page:

Access the Personalize screen.

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



- To rename a page, select the page in the Dashboard page tree and enter a new name in the Edit Page pane's **Page Name** box.
- To remove a page from the Dashboard, select the page in the Dashboard page tree and click the **Delete** button. Click **Yes** to confirm deletion.
- To modify the refresh rate of a page, select the page in the Dashboard page tree, then select the **Automatically refresh this page every X minutes** check box and specify a new refresh rate in the Edit Page pane.



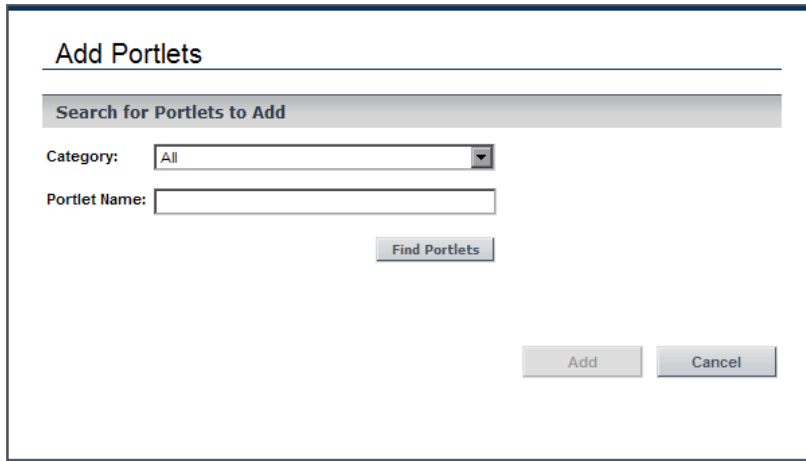
- To add portlets to a page, see “Adding Portlets” on page 226.
- To modify how portlets are displayed on a page, see “Managing Portlets” on page 228.

Adding Portlets

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

To add a portlet to a page:

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



The screenshot shows a window titled "Add Portlets". Inside the window, there is a search bar with the placeholder text "Search for Portlets to Add". Below the search bar, there is a "Category:" label followed by a dropdown menu currently set to "All". Below the category dropdown, there is a "Portlet Name:" label followed by a text input field. At the bottom center of the window is a button labeled "Find Portlets". At the bottom right of the window are two buttons: "Add" and "Cancel".

- 2 In the **Portlet Name** box, enter the name of the portlet you want to add to the page.
- 3 From the **Category** box, select the category to which the portlet belongs if the administrator has defined portlet categories.
- 4 Click **Add**.

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

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

To rearrange the order in which the portlets are displayed, or to move or remove portlets from a page, see “Managing Portlets” on page 228.

Managing Portlets

This section describes the following Dashboard functionality:

- Arranging Portlets on a Page – for details, see below
- Copying Portlets to Other Pages – for details, see below
- Renaming Portlets – for details, see page 229
- Removing Portlets from Pages – for details, see page 229

Arranging Portlets on a Page

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

To arrange the portlets on a page:

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

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

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

Copying Portlets to Other Pages

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

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

To copy a portlet to another page:

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



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

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

Renaming Portlets

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

To rename a portlet:

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

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

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

Removing Portlets from Pages

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

To remove a portlet from a page:

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



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

Index

A

- Abnormal Changes Over Time portlet 210
- accessing HP Release Control 19
- action items
 - adding comments to 97
 - changing status of 98
 - creating 95
 - editing 97
 - filtering 27
 - overview 90
 - returning 98
 - subscribing to 63
 - viewing 91, 152
 - working with 95
- Action Items mode
 - overview 57
 - working in 89
- activities
 - adjusting schedule 186
 - details 178
 - Event Log 181
 - filtering 27
 - implementation 195
 - refreshing timeline display 175
 - schedules on timeline 176
 - submitting notes 183
 - viewing information layers on timeline 183
- activity alerts 175, 187
 - display options 188
 - Group by Activity 189
 - handling 190
 - indicators 188
 - Show Open Alerts Only 188
 - Synchronize with Selected Activity 189
- activity implementation outcome 197

- activity schedules
 - rescheduling 186
 - viewing on timeline 176
- activity status
 - updating in Director module 185
 - updating in Implementor module 195
- activity timeline 175
 - activity information layers 183
 - refreshing display 175
 - representation of activities 176
 - time range 177
- alerts *See* activity alerts
- Analysis module
 - Calendar view 73
 - List view 68
 - overview 56
 - Timeline view 82
- Analysis portlets 212
- Application Severity Distribution portlet 212
- Application Status Distribution portlet 214
- approving change requests 156
- attributes, viewing 107

B

- Business CI Timeline view 83
- business CIs
 - affected by impact analysis 105
 - associating with current user 24
 - impact severity 107

C

- Calendar view 73
- causes of collisions 111
- change planner 141
- change request details, viewing 102

Change Request Impact Analysis Ratio
portlet 216

Change Request Timeline views 83
Business 83
impact severity 86
Implementor 83

change requests
adding a discussion thread to 154
approval history and status 158
approving 156
collisions 109
details 102
filtering 27
impact analysis 105
overviews 99
resolving 156
retracting approval of 156
risk analysis 125
subscribing to 60
viewing comments for 153
viewing detected changes 167
viewing summary data 99

Change Requests mode
calendar view 67
list view 67
overview 56
timeline 81

Changes Over Time portlet 209

chat rooms
activity chat rooms 200
adding and deleting 202
communicating from Director
module 191
communicating from Implementor
module 197
custom chat rooms 202
joining 203
leaving 203
participating in multiple 203

CIs
affected by impact analysis 105
viewing attributes 107

collisions
causes 111
customized calculation 123
proximity levels 110

severity levels 112
viewing colliding requests 121
viewing details 113

comments
adding to a discussion thread 155
adding to action items 97
adding to activity's Event Log 183
sending by email 155
viewing 153

communication
activity chat rooms 200
custom chat rooms 202
from Director module 175, 191
from Implementor module 197
requesting NOC assistance
(implementors only) 196
conflicts between change requests 109
customized collision calculation 123

D

Dashboard
adding pages 224
adding portlets to pages 226
copying pages 225
modifying pages 225
personalizing 223
portlet 208
refreshing pages 224
Dashboard module 207
details of change requests, viewing 102
detected changes 167
Director module
Activity Timeline 175
Alerts pane 175
Communications pane 175
refreshing activity timeline display
175
rescheduling activities 186
updating activity status 185
discussion threads
adding 154
viewing 153
documentation 11

E

Event Log

- Analysis module 164
- Director module 181

F

Favorites

- adding a request to 60
- adding an action item to 62

filtering

- action items 27
- activities 27
- change requests 27

filters

- categories for action item filter 48
- categories for change request or activity filter 34
- copying 52
- criteria for action items 48
- criteria for change requests and activities 34
- defining an action items filter 46
- defining change request or activity filters 31
- deleting 51
- modifying 50
- overview 27

H

- HP Software Support Web site 12
- HP Software Web site 13

I

impact analysis

- graph layout 108
- graphs 107
- viewing results 105

impact severity

- business CIs 107
- levels 106
- system CIs 106
- timeline views 86

implementation outcome 197

Implementor module

- Communications pane 194
- glance 194
- reporting activity outcome 197
- updating activity status 195
- viewing To-do list 194

Implementor Timeline view, Analysis module 83

K

Key Performance Indicators for CIs 182

KPI status for CIs 182

L

latent changes 167

Latent Changes Over Time portlet 210

layers, activity information 183

List view, Analysis module 68

logging in to HP Release Control 19

N

NOC assistance, requesting 196

notes, adding to activity's Event Log 183

O

online resources 12

Outcome Grouped By Risk portlet 220

outcome of implemented activities 197

Outcome Over Time portlet 218

P

personalizing the Dashboard 223

planner 141

portlets

- Abnormal Changes Over Time 210
- adding 226
- Analysis 212
- Application Severity Distribution 212
- Application Status Distribution 214
- arranging on Dashboard page 228
- Change Request Impact Analysis Ratio 216

Index

- Changes Over Time 209
 - copying 228
 - Latent Changes Over Time 210
 - Outcome Grouped By Risk 220
 - Outcome Over Time 218
 - Post Implementation 218
 - removing 229
 - renaming 229
 - Trends 209
 - viewing default 208
- Post Implementation portlets 218
- preferences, configuring for Analysis 64
- proximity levels, collisions 110

R

- reports, generating 78
- requesting NOC assistance 196
- requests, *See* change requests
- retracting approval of change requests 156
- review, Event Log 164
- risk analysis 125

S

- severity levels of collisions 112
- simulating changes 141
- subscribing to
 - action items 63
 - change requests 60
- system CIs, impact severity 106

T

- time periods
 - selecting 61
 - zooming in 60
- timeline
 - Analysis module 82
 - Director module 176
- Trends portlets 209

U

- union filters 44
- updating activity status
 - Director module 185

- Implementor module 195
- users
 - associating business CIs 24
 - configuring properties for current user 22

V

- Voting Summary tree 154

Z

- zooming in on a time period 60