HP Release Control

for the Windows® operating systems

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User Guide

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To find more information about access levels, go to:

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Table of Contents

PART III: ANALYZING CHANGES

PART IV: MONITORING AND IMPLEMENTING ACTIVITIES

PART V: DASHBOARD

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

This guide contains the following parts:

Part I Introduction

Describes the various components of the HP Release Control application.

Part II User Settings

Describes how to view and configure user properties and Analysis module settings for the current HP Release Control user.

Part III Analyzing Changes

Describes the different change request views and change request information displayed across the various tabs in the Analysis module, and how to filter change requests, action items, and activities.

Part IV 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 them.

Part V 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 Deployment Guide explains how to install and deploy HP Release Control. This guide is accessible in the following formats, from the following locations:

- in PDF format on the HP Release Control DVD
- in PDF format by selecting **Help** > **HP Release Control Documentation Library** from the HP Release Control application

HP Release Control Configuration Guide explains how to 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).

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

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

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Part I

Introduction

1

Introduction to HP Release Control

This chapter includes:

Concepts

Reference

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, see "System Requirements" in the *HP Release Control 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 "User Authentication" in the *HP Release Control 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.

Part II

User Settings

2

User Preferences

This chapter includes:

Concepts

Reference

User Preferences Overview

HP Release Control enables you to view and configure user properties for the current HP Release Control user and select the business CIs you want to associate with the current user. For more information on configuring user settings, see "Configuring User Settings" in *HP Release Control Configuration Guide*.

User Preferences User Interface

This section includes:

User Preferences Dialog Box

Description	Enables you to view and configure user properties for the current HP Release Control user and select the business CIs you want to associate with the current user. **To access:** Select **Preferences** > **User Preferences**.
Important Information	If you are working in identity management or LDAP mode, you cannot change the user's password.
Useful Links	➤ "User Authentication" in *HP Release Control Configuration Guide* ➤ "Configuring User Settings" in *HP Release Control Configuration Guide*

Details Tab

Description	View and modify the properties of the current HP Release Control user that were configured by the administrator. **To access:** Click the **Details** tab in the User Preferences dialog box.
Important Information	If you are working in identity management or LDAP mode, you cannot change the user's password.
Useful Links	"User Authentication" in *HP Release Control Configuration Guide*

The following elements are included (unlabeled GUI elements are shown in angle brackets):

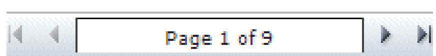
GUI Element (A-Z)	Description
<**First name**>	First name of the currently logged in user.
<**Last name**>	Last name of the currently logged in user.
<**User name**>	User name with which the current user logs in to HP Release Control.
Email address	The email address of the current user. This is the email address to which notifications are sent for this user.

GUI Element (A-Z)	Description
Password	To change the user's password, type in a new password. This is the password by which the user logs in to HP Release Control. **Note:** If you are working in identity management or LDAP mode, you cannot change the user's password.
Retype password	Retype the password to confirm the password entered in the **Password** box. **Note:** If you are working in identity management or LDAP mode, you cannot change the user's password.

Business CIs Tab

Description	Enables you to associate 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 impacts the business CI. Although the administrator is responsible for the initial association of business CIs with users, you can associate or remove business CI associations from the current user. **To access:** Click the **Business** tab in the User Preferences dialog box.
Useful Links	"Configuring User Settings" in the *HP Release Control Configuration Guide*

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Show Obsolete.** Toggle between hiding and displaying the obsolete CIs.
	**Find.** Search for a specific business CI by entering the name or part of a name in the search box. The search returns all business CIs that contain the entered string somewhere in the name. Click the **Find** button to run the search.
	Move the selected business CIs from the **Available Business CIs** list to the **My Business CIs** list. The business CI is associated with the current user.
	Move the selected business CIs from the **My Business CIs** list to the **Available Business CIs** list. The business CI is not associated with the current user.
<View other pages>	To view other pages, use the left and right arrows. The number between the left and right arrows indicate which page is currently being displayed. For example, 3 of 5 means that the 3rd page out of 5 is being displayed. 

3

Analysis Preferences

This chapter includes:

Concepts

Reference

Analysis Preferences Overview

HP Release Control enables you to configure the settings for the Analysis module. For details, see "Analysis Preferences Dialog Box" on page 28.

Analysis Preferences User Interface

This section includes:

Analysis Preferences Dialog Box

Description	Enables you to define the settings for the Analysis module for the current HP Release Control user. **To access:** Select **Module** > **Analysis** > **Preferences** > **Analysis Preferences**.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Auto Save Workspace	HP Release Control saves your Analysis module settings every two minutes. The next time you log in to HP Release Control, the last saved Analysis module settings are displayed. **Note:** You can choose this option together with the **Save Now** option if required.
Notify me on updates to items in my Favorites list	Enables you 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

GUI Element (A-Z)	Description
Page size	Enables you 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. **Default value:** 20
Save Now	HP Release Control saves your current Change Analysis module settings immediately. **Note:** You can choose this option together with the **Auto Save Workspace** option if required.

Part III

Analyzing Changes

4

Analysis Module

This chapter includes:

Concepts

Tasks

Reference

Analysis Module Overview

The Analysis module displays a detailed analysis of each change request that has entered 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.

HP Release Control enables you to configure the settings for the Analysis module. For details, see "Analysis Preferences Dialog Box" on page 28.

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, see "Configuring the Automatic Creation of Action Items" in the *HP Release Control 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. For details, see "Change Requests/Action Items Pane" on page 116.
- 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. For details, see "Collaborate > Action Items Tab" on page 118.

Impact Analysis

Impact analysis calculates the effects of change requests on CIs. Both the CI details, and their relationships are imported from HP Universal CMDB. For information on how to set up and configure HP Release Control to calculate impact analysis, see "Configuring Impact Analysis" in the *HP Release Control Configuration Guide*.

HP Release Control enables you to view the impact analysis calculation results for a change request in the Assess > Impact tab. The Assess > 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. For details, see "Assess > Impact Tab" on page 67.

Risk Analysis

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

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

where:

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

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

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

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

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

Example of Risk Analysis Calculation

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

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

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

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

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

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

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

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

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

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

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

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

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

```
Weight/Total Weight x Score = 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 to 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 x 10 =2
```

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

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

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

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

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

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

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

To view the risk analysis for a change request, see "Assess > Risk Tab" on page 78.

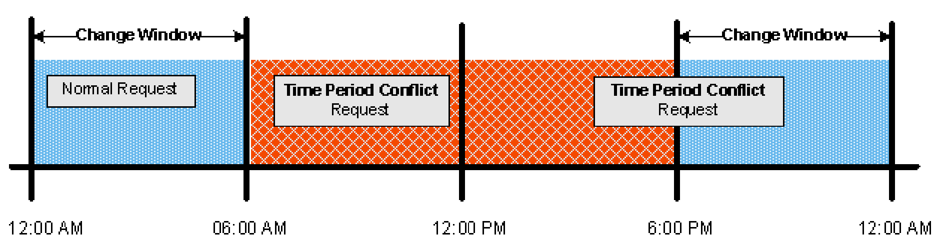
Time Periods

Time periods define when changes may and may not be implemented. The types of time periods are:

- **Change Window.** A period of time within which requests are designated to be implemented.
- **Blackout.** A period of time within which requests may not be implemented.
- **Neutral to Changes.** A period of time indicating an external event, such as a holiday, which has no direct bearing on request implementation.

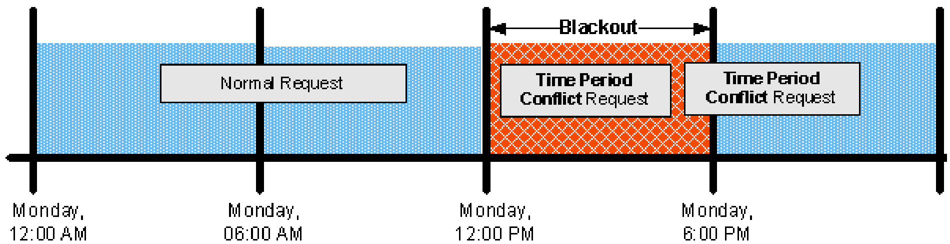
For example, to ensure that your company's service level agreements are upheld, you may define a **Change Window** time period such that changes to your corporate Web site may only take place from 12:00 AM to 6:00 AM or from 6:00 PM to 12:00 AM. For details on the recommended procedure for defining time periods, see "Define Time Periods" on page 51.

In this case, for a request to be considered **normal**, it must occur completely within a **Change Window** period. If any part of the request occurs outside the **Change Window** period, the entire request is considered to have created a Time Period Conflict. For details about viewing Time Period Conflicts, see "Assess > Time Period Conflicts Tab" on page 85.



Likewise, you may define a **Blackout** time period such that changes to the Web site may not take place on Mondays from 12:00 PM to 6:00 PM.

In this case, for a request to be considered **normal**, it must occur completely outside a **Blackout** period. If any part of the request occurs inside the **Blackout** period, the entire request is considered to have created a Time Period Conflict.



For details on how to configure time periods, see "Configuring Time Periods" in the *HP Release Control Configuration Guide*.

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.

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.

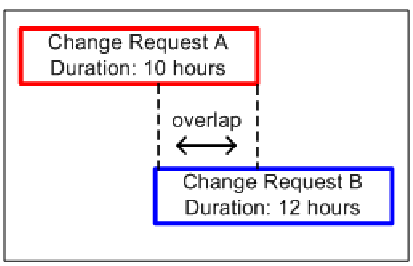
This section also includes:

- "Collision Proximity Levels" on page 42
- "Causes of Collision" on page 43
- "Collision Severity" on page 44

Collision Proximity Levels

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

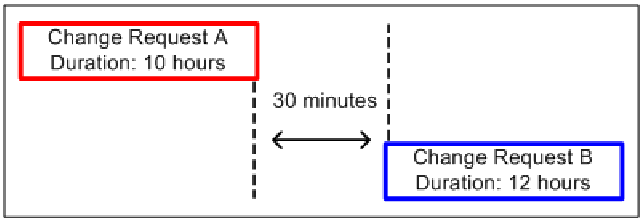
- **Overlap.** The two change requests have overlapping schedules.



- **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**.



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 "Configuring Collision Calculations" in the *HP Release Control Configuration Guide*.

For information about viewing collision details, see "Assess > Collisions Tab" on page 70.

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.

For more information about similar changes, see "Assess > Similar Changes Tab" on page 81.

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 section also includes:

- "Understanding Scheduled and Discovered Changes" on page 47
- "Viewing Detected Changes" on page 47
- "Viewing Latent Changes" on page 47

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**. For details on how to view detected changes, see "Review > Verifications Tab" on page 145.

Viewing Latent Changes

When a detected change 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. For details on how to view detected changes, see "Review > Verifications Tab" on page 145.

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, see "Using the Pre- and Post-Change Request Processing Functions" in the *HP Release Control Configuration Guide*.

Resolve Open Issues before the CAB Meeting

This task describes how to identify change request collisions associated with changes scheduled to be discussed during the next Change Advisory Board meeting. Then, it describes how to resolve the problems prior to the meeting, so that the CAB discussion can focus only on issues which cannot be resolved offline.

This task includes the following steps:

- "View the Change Requests to be Discussed at the CAB Meeting" on page 48
- "Sort the Change Requests by Collision Severity" on page 49
- "Create an Action Item" on page 49

1 View the Change Requests to be Discussed at the CAB Meeting

Elizabeth Hampton is the Change Manager for the ABC Software Company. First she selects **Module** > **Analysis**. In the Change Requests/Action Items pane, she selects **View** > **Change Requests** and then clicks **List**. She then clicks the downward arrow to the right of the **Change Requests** box and selects the **Next CAB Meeting** filter to view the change requests that are scheduled to be discussed at the next CAB meeting. For more information about filtering change requests, see "Activity Filter/Change Request Filter/Action Item Filter Dialog Box" on page 152.

2 Sort the Change Requests by Collision Severity

In the Change Requests pane, Elizabeth clicks the header of the **Collision Severity** column to sort the change requests by severity. The colliding change requests appear at the top of the list and the changes having the highest severity appear first.

For more information about change request collision, see "Change Request Collisions" on page 41.

3 Create an Action Item

Elizabeth creates an action item for each colliding change to request that the collisions be resolved before the next CAB meeting.

In the Analysis and Details pane, she selects the change request for which she wants to create a new action item, and then clicks the **Collaborate** > **Action Items** tab. She then clicks the **New Action Item** button to open the Add Action Item dialog box and assigns the action item to the relevant person. For more information on how to create an action item, see "Add/Edit Action Item Dialog Box" on page 64.

Use the Change Planner to Reschedule a Change

This task includes the following steps:

- "Select a New Schedule in the Change Planner" on page 50
- "Run a Simulation in the Change Planner" on page 50
- "View the Summary Information" on page 50
- "View the Impact Analysis of the Simulation" on page 51
- "View the Collision Analysis of the Simulation" on page 51
- "View the Time Periods Conflicts Analysis of the Simulation" on page 51
- "View the Risk Analysis of the Simulation" on page 51

1 Select a New Schedule in the Change Planner

Select **Module** > **Analysis** and in the Change Requests/Action Items pane, click the **Plan Selected Change** button to open the Change Planner. In the Scheduling pane, use the calendars in the **Planned start** and **Planned end** boxes to set a new schedule. For details, see "Scheduling Pane" on page 92.

2 Run a Simulation in the Change Planner

In the Change Planner, click the **Run Simulation** button to run the simulation.

3 View the Summary Information

In the Change Planner, click the **Preview** tab to display the:

- Current planned times of the change compared with the simulated time.
- Summary of the current analysis results compared with the simulated analysis results. For more information on the Preview tab, see "Preview Tab" on page 95.

4 View the Impact Analysis of the Simulation

In the Change Planner, click the **Impact** tab to display the impact analysis of the simulation. For more information about viewing impact analysis results and the filter options, see "Impact Tab" on page 95.

5 View the Collision Analysis of the Simulation

In the Change Planner, click the **Collisions** tab to display the collision analysis of the simulation. For more information about viewing collision analysis results and the filter options, see "Collisions Tab" on page 96.

6 View the Time Periods Conflicts Analysis of the Simulation

In the Change Planner, click the **Time Periods Conflicts** tab to display the time period conflicts analysis of the simulation. For more information about viewing time period conflicts analysis results and the filter options, see "Time Period Conflicts Tab" on page 97.

7 View the Risk Analysis of the Simulation

In the Change Planner, click the **Risk** tab to display the risk analysis of the simulation. For more information about viewing time risk results, see "Risk Tab" on page 98.

Define Time Periods

This task describes the recommended procedure for defining time periods.

This section includes:

Identify the Change Window and Blackout Periods

Time periods define when changes may and may not be implemented.

When defining time periods, it is recommended to first identify the Change Windows and the Blackout periods in your organization.

➤ A Change Window is a period of time within which requests are designated to be implemented. For example, you may define a Change Window that allows you to make changes to your company's Web site only from Saturday at 5:00 PM to Sunday at 11:00 PM.

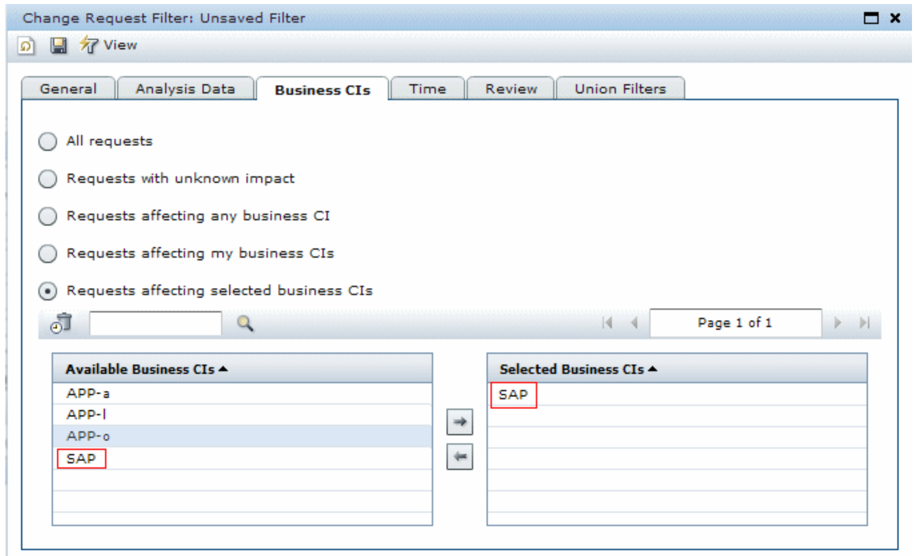
➤ A Blackout period is a period of time within which requests cannot be implemented. For example, you might need to define a Blackout period that restricts you from making any changes to your company's Web site during periods that extend from the first day after the end of each fiscal quarter, to the day after your company issues a press release regarding the company's performance in that quarter.

Define a Filter

Define a filter that is relevant to the Change window or Blackout period you identified in your organization.

For example, if your organization needs to make changes to your SAP application, you can create a filter that displays change requests whose impact analysis results affect certain business CIs. You define the filter to include the business CIs that are associated with the SAP application.

In the Business CIs tab of the Change Request Filter dialog box, you select the Business CIs you want to include in the filter. In the following example, a SAP business CI is selected.



For details on how to create a filter, see "Activity Filter/Change Request Filter/Action Item Filter Dialog Box" on page 152.

When you save the filter, give it an appropriate name, for example, sap_application, and then select the **Time Period Filter** check box. The filter then appears in the **Matching Changes: Filter** box in the Administration module's Time Periods tab and you can select this filter when defining a time period category.

For details on defining time periods, see "Configuring Time Periods" in the *HP Release Control Configuration Guide*.

Define a Time Period Category

After you create the relevant filters, you configure a time period category for each Change Window and Blackout period. If there is more than one type of Change Window and Blackout period, you must define a different category for each one.

For example, you have to define a Change Window for both your SAP and Siebel applications. You may define a Change Window in which changes to the SAP application may only take place every Friday from 10:00 PM to 11:30 PM and another Change Window in which changes to the Siebel application may take place every Saturday night from 9:00 PM to 11:00PM. In this case, you would define a different time period category for each Change Window.

The Time Periods tab in the Administration module enables you to define new time period categories. When you define a new time period category relating to the SAP application, you can select the sap_application filter from the **Matching Changes: Filter** box to instruct HP Release Control to include the change request in the current category. You then define the required recurrence rule you want to apply to the time period category.

For details on defining time periods, see "Configuring Time Periods" in the the *HP Release Control Configuration Guide*.

Analysis Module User Interface

This section describes (in alphabetical order):

➤ Action Items Pane on page 56

➤ Add Change Request to Similarity Set Dialog Box on page 63

➤ Add/Edit Action Item Dialog Box on page 64

➤ Approve/Retract Change Request Dialog Box on page 66

➤ Assess > Impact Tab on page 67

➤ Assess > Collisions Tab on page 70

➤ Assess > Risk Tab on page 78

Action Items Pane

Description	Displays action items that have been created from change requests as well as the basic information and user comments for each action item selected from the list. **To access:** In the Change Requests/Action Items pane, select **View** > **Action Items**.
Useful Links	"Action Items" on page 34

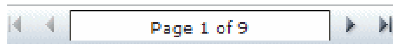
Action Items List Pane

Description	Displays a list of the action items.
Important Information	➤ By default, the Action Items mode displays all the action items that were created from all the change requests in the system. ➤ You can sort the order of appearance of the requests according to each column by clicking the required column heading.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Opens the Respond dialog box, which enables the following: ➤ Any user to post comments. ➤ The assignee to mark an open action item as **Done** or return the item to its creator. ➤ The creator to reopen an action item marked as **Done**. For more information, see "Respond Dialog Box" on page 140. **Note:** Enabled only when the action item selected is assigned to the current user.
	**Close Action Item.** Enables the creator to change the status of the action item to **Closed**. **Note:** Enabled only when the action item selected is assigned to the current user.
	**Edit Action Item.** Enables the creator to edit an open action item. Opens the Add/Edit Action Item dialog box. **Note:** Enabled only when the action item selected is assigned to the current user.
	**New Action Item.** Enables you to create a new action item associated with the same change request as the selected action item. Opens the Add/Edit Action Item dialog box,
	**Delete Action Item.** Enables the creator to delete an action item. **Note:** Enabled only when the action item selected is assigned to the current user.
	**Forward by E-Mail (FYI).** Enables you to send an action item by email for information purposes. Opens the Send E-mail dialog box.

GUI Element (A-Z)	Description
	**Add Selected Action Item to Favorites/ Delete Selected Action Item from Favorites**. Toggles between adding or removing the selected action item from the Favorites filter. For information about Filters, see "Filtering Change Requests, Activities, and Action Items" on page 147. Click the drop-down arrow and select one of the following options: ➤ **Delete from Favorites.** Deletes the selected action items from the Favorites filter. ➤ **Delete all AI's in the Favorites Filter.** Deletes all the action items in the Favorites filter. **Note:** You can also subscribe to receive notifications when certain modifications are made to favorite action items. For details, see "Analysis Preferences User Interface" on page 27.
	**Subscribe to Selected Action Item/Unsubscribe from Selected Action Item**. Enables you to receive email notifications or cancel a notification subscription for the selected action item. For information on configuring notification rules and conditions, see "Configuring Notifications" in the *HP Release Control Configuration Guide*.
	**Go to Parent Action Item.** Displays the parent action item for the selected derived action item.

GUI Element (A-Z)	Description
<View other pages>	➤ When you are in List view, you can view other pages by using the left and right arrows.  The number between the left and right arrows indicate which page is currently being displayed. For example, 3 of 5 means that the 3rd page out of 5 is being displayed. ➤ When you are in **Calendar** view or **Timeline view: Group by Change Request**, you can click the navigation arrows adjacent to the date to scroll through to the required date. Navigating through the calendar or timeline or is relative to the time frame selected. For example: ➤ In the Timeline view, if **Month** is selected, clicking the navigation button to the right of the date box displays the change requests for the following month. ➤ In the Calendar view, clicking the navigation button to the left of the date box displays the change requests for the previous week.
Assigned to	Displays the name of the user to whom the action item was assigned. This user can respond to the request in one of the following ways: ➤ Complete the task involved and mark the action item as **Done** once it has been completed. ➤ Reject the request and return it to the creator. If necessary, the assignee can also create a new, derived action item from the current action item.
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**.

GUI Element (A-Z)	Description
Due date	The day by which the creator determined that the action item must be completed. If this date has passed and the item has not been closed, the due date is displayed in red. A tooltip indicating the due date (including the day and hour) of the action item is visible when you hold 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.
ID	Displays the HP Release Control-generated ID number of the action item.
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.
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.
Priority	Displays a colored flag indicating the priority level that the creator assigned to the action item. The color of the flag indicates the priority level as follows: ➤ **Red** – High ➤ **Yellow** – Normal ➤ **Green** – Low A tooltip indicating the priority of the action item is visible when you hold the mouse pointer over the action item icon.

GUI Element (A-Z)	Description
Status	Displays an icon indicating the status of the action item. The following icons indicate the following statuses: ➤ Open ➤ Done ➤ Closed A tooltip indicating the status of the action item is visible when you hold the mouse pointer over the action item icon.
Subject	Displays a brief overview of the action item. Parent action items can be expanded to display all the derived action items. To expand or collapse action items, click the Expand button to the left of the item. Derived action items are displayed in light blue.

Action Item Posting Pane

Description	Displays basic information and user comments for each action item selected from the Action Items List pane.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
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.
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.
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.
Date due	The day by which the creator determined that the action item must be completed.
Status	Displays the status of the action item. The possible options are: ➤ **Open** ➤ **Done** ➤ **Closed**
Subject	Displays the subject line of the action item (above the comments).

Add Change Request to Similarity Set Dialog Box

Description	HP Release Control calculates similar changes according to specific criteria as defined in the similar settings directory. A user with a Similarity Teacher role can add requests to the Similar Changes list even if they are not automatically regarded as being similar according to these criteria. **To access:** In the Details and Analysis pane, click **Assess** > **Similar tab**, and then click the **Add Change Request to Similarity Set** button.
Useful Links	➤ "Configuring User Settings" in the *HP Release Control Configuration Guide*. ➤ "Similar Changes" on page 45

The following elements are included:

GUI Element (A-Z)	Description
Request ID	Enter the ID of the request you want to add to the list.
Service Desk	Select the required service desk.

Add/Edit Action Item Dialog Box

Description	Enables you to create an action item for a specific change request or edit an existing action item. **To access:** In the Change Requests/Action Items pane, select **View** > **Action Items**. If you are in Action Items mode, select the action item for whose associated change request you want to create a new action item. If you are in Change Requests mode, select the change request for which you want to create a new action item. ➤ To create an action item, click **New Action Item** from the toolbar in the Change Requests/Action Items pane. If you select an action item 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 List pane. The action item you create is added to both the Action Items pane and the Action Items view of the associated change request's Collaboration > Action Items tab. An email notification is sent to the assignee. ➤ To edit an existing action item, click **Edit Action Item** from the toolbar in the Change Requests/Action Items pane. The **Edit Action Item** button is only enabled when the action item selected is assigned to the current user. The action item properties are updated in both the Action Items List pane and the Action Items view of the associated change request's Collaboration tab. **Notes:** ➤ When modifying an action item, you cannot modify the level (parent/derived) of the action item. ➤ The **Edit Action Item** button is only enabled when the action item selected is assigned to the current user and the status of the item is not **Closed**.

Important Information	The creator of an action item can only modify the assigned action item if it is still open. For details about the statuses of action items, see "Status" on page 61.
Useful Links	"Action Items" on page 34

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Assignee	Select a user to whom you want to assign the selected action item. Click **Assignee** to the right of the **Assignee** box. The Select Users dialog box opens. Locate and select the user to whom you want to assign the action item. The user name of the user you selected appears in the **Assignee** box.
Creator	The creator of the action item.
Description	(Optional) A free text box containing a brief description of the action item.
Due Date	Select the date and time by which the action item should be completed. Click the calendar button to the right of the **Due Date** box to select the date and time. 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.
Priority	Select the priority you want to assign the action item. The options are: ➤ **Low** ➤ **Medium** ➤ **High**
Request ID	The ID of the change request.
Subject	A brief overview of the action item.

Approve/Retract Change Request Dialog Box

Description	Enables you to approve/retract a change request. In the **Comments** box, enter the information you want HP Release Control to display as part of your approval/retraction. This information is not transferred to the service desk application. Enter the user name and password of your service desk application in the Login dialog box that opens. 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. 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**. When you click **Approve** or **Retract**, HP Release Control checks whether your user name and password are correct and whether you are currently allowed to approve/retract the change request. If so, HP Release Control approves/retracts the request and the details appear in the Collaborate tab. For more information on approving a change request or retracting the approval, see "Collaborate > Resolution Tab" on page 121. **To access:** In the Analysis and Details pane, click **Collaborate** > **Action Items** tab, and then click the **Approve** or **Retract** button in the Change Approval pane.

Important Information	➤ The **Approve/Retract** buttons are enabled only if the required criteria are met. For details, see Collaborate > Resolution 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. ➤ To view details of your approval, click the **Approval Log** button in the Change Approval pane of the Collaborate > Resolution tab. ➤ If you have retracted the approval of the change request, the retraction details appear in the Cab Decisions pane of the Collaborate > Resolution tab. ➤ To update a change request's status in the Change Requests pane, 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.
Useful Links	"Collaborate > Resolution Tab" on page 121

Assess > Impact Tab

Description	Describes how to view the impact analysis calculation results for a change request. 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. **To access:** In the Analysis and Details pane, click the **Assess** > **Impact** tab.
Useful Links	"Impact Analysis" on page 35

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Open Graph Window.** Enables you to view the impact analysis calculation results in graphic format. Opens the Impact Graph window.
	**CI Attributes.** Enables you to view the attributes of the selected CI. Opens the CI Attributes window. **Note:** To customize the attributes that HP Release Control displays, see "Configuring HP Universal CMDB-Related Settings" in *HP Release Control Configuration Guide*.
▶▼	**Expand/Collapse.** Enables you to expand/collapse a CI to display/hide all the child CIs.
<Impact Severity Levels of Business CIs>	The icons to the left of each business CI name indicate whether the business CI is directly or indirectly affected by the change request: ➤  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.

GUI Element (A-Z)	Description
<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. Following are the default impact severity level icons: Critical High Medium Low Very No impact analysis available ➤ If a CI is directly affected by the change CI (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.
Affected by	Displays the CIs which have an affect on the selected CI.
Affects	Displays the CIs which are affected by the selected CI.
Impact CIs	Displays the affected and changed CIs (ACIs and CCIs).

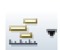
Assess > Collisions Tab

Description	Displays details about all the change requests that collide with the change request selected in the Change Requests pane. You can view collisions in the List view or Timeline view. In both views, the causes of collisions are also displayed. **To access:** In the Analysis and Details pane, click **Assess** > **Collisions** tab.
Included in Tasks	"Resolve Open Issues before the CAB Meeting" on page 48
Useful Links	"Change Request Collisions" on page 41

Colliding Changes Pane

Description	Enables you to view collisions in the List view or Timeline view.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**List.** Displays the change requests that collide with the change request selected in the Change Requests pane in table format. For details, see "List View" on page 74.
	**Timeline.** Displays colliding change requests as solid bars on a timeline. For details, see "Timeline View" on page 77.

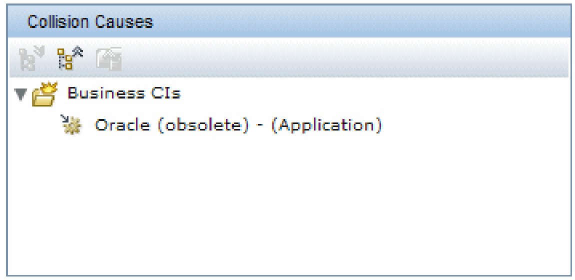
GUI Element (A-Z)	Description
	**Go to Colliding Request.** Enables you to view the change request with which the colliding change request displayed in the Colliding Changes pane collides in the Change Request pane.
	**Zoom in/Zoom out.** Enables you to divide the timeline into 1-hour or 6-hour time intervals. Click the arrow next to the **Zoom in/Zoom out** button to select the required interval. **Note:** Available in Timeline view only.

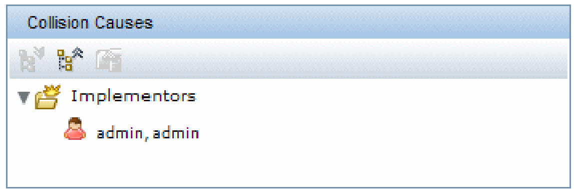
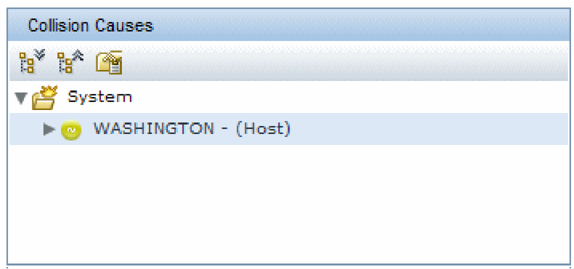
Collision Causes Pane

Description	Displays the details of the factors causing the collision of the selected change request in the in the List or Timeline view.
Important Information	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**.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

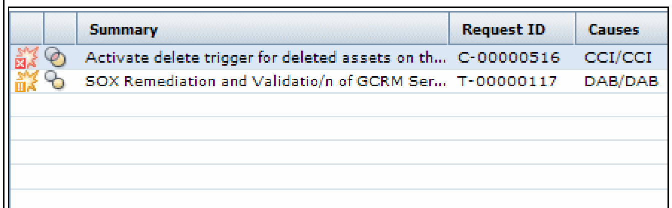
GUI Element (A-Z)	Description
	**Expand All/Collapse All.** Enables you to expand or collapse the collision causes.
	**CI Attributes.** Enables you to view the attributes of the selected CI. Opens the CI Attributes window. **Note:** To customize the attributes that HP Release Control displays, see "Configuring HP Universal CMDB-Related Settings" in the *HP Release Control Configuration Guide*.

GUI Element (A-Z)	Description
<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. **Note:** 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.

GUI Element (A-Z)	Description
<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**. 
<Collision Cause: System>	If one of the collision causes is commonly 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 "Assess > Impact Tab" on page 67.

List View

<table>
<tr>
<td>Description</td>
<td>
Displays the change requests that collide with the change request selected in the Change Requests pane in table format. The table is sorted in order of the severity of the collisions.



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

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

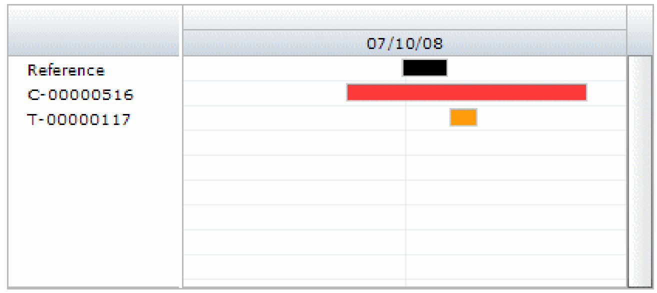
To access: In the Details and Analysis pane, select Assess > Collisions and then click List in the Colliding Changes pane.
</td>
</tr>
</table>

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
<Collision severity>	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. Collision severity is indicated as follows: Critical (red) High (orange) Medium (yellow) Low (khaki) Very Low (olive green) For details about how collision severity is calculated, see "Change Request Collisions" on page 41.
<Proximity level>	Displays an icon indicating the collision proximity level. Collision proximity is indicated as follows: Overlap Overlap warning For more information about collision proximity levels, see "Change Request Collisions" on page 41.

GUI Element (A-Z)	Description
Causes	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. The following is a list of all the possible collision causes: ➤ **CCI-CCI.** A common CI is changed by both change requests. ➤ **CCI-ACI.** A common CI is changed by one of the change requests and indirectly affected by the other change request. ➤ **ACI-ACI.** A common CI is indirectly affected by both change requests. ➤ **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. For more information about collision causes, see "Change Request Collisions" on page 41.
End	Displays the date on which the implementation of the conflicting change request is scheduled to end.
Request ID	Displays the service desk application request ID of the conflicting change request.
Start	Displays the date on which the implementation of the conflicting change request is scheduled to begin.
Summary	Displays a brief overview of the conflicting change request.

Timeline View

Description	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. **To access:** In the Details and Analysis pane, select **Assess** > **Collisions**. Then click **List** in the Colliding Changes pane.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
<**Collision severity**>	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

Assess > Risk Tab

Description	Enables you to view the risk analysis for a change request. 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. For details on performing risk analysis on change requests, see "Configuring Risk Analysis" in the *HP Release Control Configuration Guide*. **To access:** In the Analysis and Details pane, click **Assess** > **Risk** tab.
Useful Links	"Risk Analysis" on page 36

The following elements are included:

GUI Element (A-Z)	Description
	**Drill Down.** Displays the risk calculation details in the Potential Damage and Probability of Failure panes.
	Returns to the upper level view.
Potential Damage	Displays a graphic illustration that 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. **Note:** This graph also appears in the lower level view, after clicking  **Drill down**.

GUI Element (A-Z)	Description
Potential Damage Factor Details	Displays the details about each risk factor in table format. The table includes the following columns: ➤ **Data.** The source data for the risk factor—for example, data from a field in the integrated service desk application. ➤ **Description.** A description of the risk factor defined during the HP Release Control configuration process. ➤ **Name.** The name of the risk factor defined 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. ➤ **Weight.** The weight assigned to the risk factor 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 to the risk factors.
Probability of Failure	Displays a graphic illustration that 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. **Note:** This graph also appears in the lower level view, after clicking  **Drill down**.

GUI Element (A-Z)	Description
Probability of Failure Factor Details	Displays the details about each risk factor in table format. The table includes the following columns: ➤ **Data.** The source data for the risk factor—for example, data from a field in the integrated service desk application. ➤ **Description.** A description of the risk factor defined during the HP Release Control configuration process. ➤ **Name.** The name of the risk factor defined 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. ➤ **Weight.** The weight assigned to the risk factor 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 to the risk factors. **To access:** Click **Drill down** in the Probability of Failure pane.
Risk Information	Displays the risk calculation.

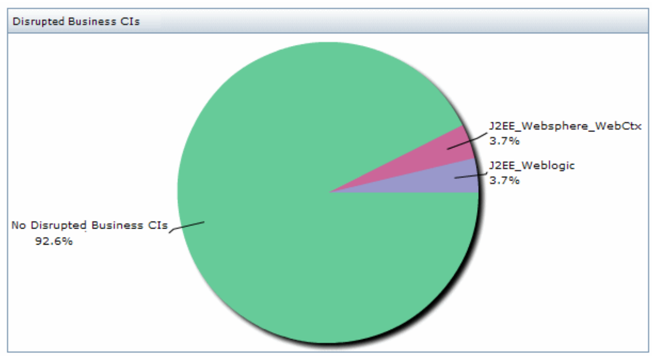
Assess > Similar Changes Tab

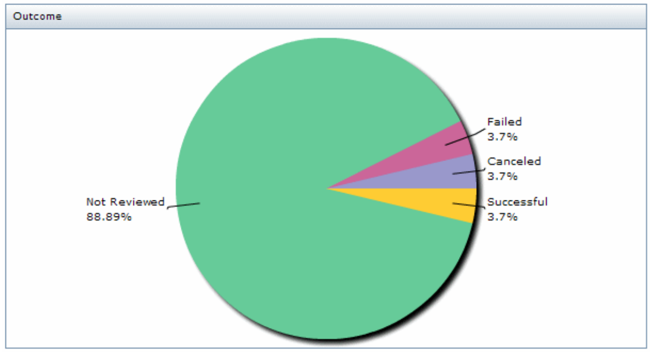
Description	Displays a list of changes that are similar to the change request selected in the Change Requests/Action Items pane. For more information about similar changes, see "Similar Changes" on page 45. **To access:** In the Analysis and Details pane, click **Assess** > **Similar Changes** tab.

The following elements are included:

GUI Element (A-Z)	Description
	**Similar Changes.** Displays a list of requests which are similar to the selected request in the Change Requests/ Action Items pane.
	**Statistics.** Displays the Outcome and Disrupted Business CIs graphs. The information displayed in the graphs is aggregated over all the requests displayed in the Similar Changes list.
	**Add Change Request to Similarity Set.** HP Release Control calculates similar changes according to specific criteria as defined in the similar settings directory. If you have been assigned the Similarity Teacher role, you can add requests to the Similar Changes list even if they are not automatically regarded as being similar according to these criteria. Opens the Add Change to Similarity Set dialog box. **Notes:** ➤ After the request is added to the Similar Changes list, a check mark appears in the **Confirmed** column. ➤ 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.

GUI Element (A-Z)	Description
	**Confirm Change Request Similarity.** Enables a user with a Similarity Teacher role to confirm that a request is similar. This guarantees that the request always appears in the Similar Changes list, irrespective of any other changes that are made to the list. **Notes:** ➤ A check mark appears in the **Confirmed** column next to the request that is confirmed as similar. ➤ Confirming a request as similar influences the way HP Release Control calculates future similar changes. ➤ This option is only available to a user with a Similarity Teacher role.
	**Delete Change Request from Similarity Set.** HP Release Control calculates similar changes according to specific criteria as defined in the similar settings directory. If you have been assigned the Similarity Teacher role, you can delete requests from the Similar Changes list even if they are regarded as being similar according to these definitions. **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 a Similarity Teacher role.
	**Open Similar Details Window.** Enables you to view PIR details for any similar change with a **Closed** status, where a PIR was created. The Similar Details window opens and displays the Disrupted Business CIs and Review Notes information entered during the creation of the PIR. For details on creating a PIR, see "Review > Conclusions Tab" on page 142.

GUI Element (A-Z)	Description
	**Go to Similar Request.** Enables you to view the list of similar changes for any request that appears in the Similar Changes list. The selected request is displayed in the Change Requests list view, and the Similar Changes list is updated to display the list of similar changes for the newly selected request.
Confirmed	Indicates requests which have been added to the list or have been confirmed as being similar. For more information about similar changes, see "Similar Changes" on page 45. **To access:** Click the **Similar Changes** button.
Disrupted Business CIs pane	Specifies which other business CIs were affected by the similar changes.  **To access:** Click the **Statistics** button.
Ended	Displays the start date for the request. **To access:** Click the **Similar Changes** button.
Impact Severity	Indicates the impact severity level of the request. **To access:** Click the **Similar Changes** button.
Outcome	Displays the outcome for the request. Requests with any status other than **Closed** are automatically assigned the outcome **Not reviewed**. **To access:** Click the **Similar Changes** button.

GUI Element (A-Z)	Description
Outcome pane	Displays aggregate outcome statistics for all the requests in the Similar Changes list.  **To access:** Click the **Statistics** button.
Request ID	Displays the reference ID number for the request in the service desk application. **To access:** Click the **Similar Changes** button.
Review Date	Displays the date a Post Implementation Review (PIR) was created for the request. For more information on PIRs, see "Review > Conclusions Tab" on page 142. **To access:** Click the **Similar Changes** button.
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. **To access:** Click the **Similar Changes** button.
Summary	Displays a brief overview of the request. **To access:** Click the **Similar Changes** button.

Assess > Time Period Conflicts Tab

Description	Displays the time period conflicts in which the selected change request is scheduled to take place either outside of a **Change Window** (periods in which change requests are allowed to take place) or within a **Blackout** period (periods in which change requests are not allowed to take place). For more information on how time period conflicts are calculated, see "Configuring Time Periods" in the *HP Release Control Configuration Guide*. You can choose to display the time period occurrences in the background of the view, according to the category colors and time period patterns that were configured by the HP Release Control administrator. **To access:** ➤ In the Analysis and Details pane, click **Assess** > **Time Period Conflicts** tab. or ➤ In the Analysis and Details pane, click **Preview** > **Overview** tab. In the Analysis Info pane, the displayed category for the **Time Period Conflicts** field serves as a link to the Time period Conflicts tab. or ➤ In the Change Planner dialog box, click the **Time Period Conflicts** tab.
Important Information	If the selected change request has no planned start or end time, the buttons on the toolbar become unavailable and the grid inside the timeline disappears.
Included in Tasks	"Define Time Periods" on page 51
Useful Links	"Time Periods" on page 40

Conflicts Pane

Description	Displays the configured Change Window and/or Blackout periods that are the causes of the time period conflict.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

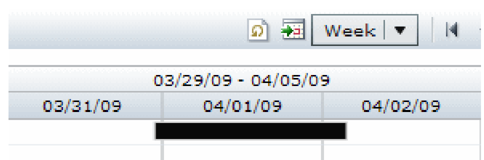
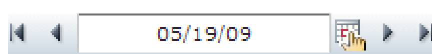
GUI Element (A-Z)	Description
	**Plan Selected Change.** Enables you to simulate the effects of modifying the details of a change request. Opens the Change Planner dialog box. You can use the Change Planner dialog box to modify the planned start and/or end of the change request to avoid creating a time conflict, and then simulate the effects of the modifications.
	**Blackout.** Denotes a period in which change requests are not allowed to take place.
	**Change Window.** Denotes a period in which change requests are allowed to take place.
<Color of time period>	The color assigned to the time period category as defined by the HP Release Control administrator. This is the color that HP Release Control uses to display the category in the Analysis module.
Time Period	The time period category defined by the HP Release Control administrator, with which the change request is conflicting.

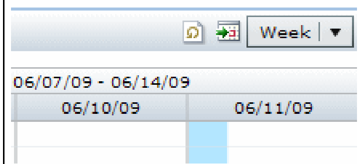
Timeline Pane

Description	Displays the occurrences of the time period conflict of the selected change request in a timeline.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Select Time Period.** Displays a list of time period categories in which the request meets the criteria of the category's selected filter. You can select the configured time periods you want to display in the background. By default, all the time periods are displayed. For information on how to configure time periods, see "Configuring Time Periods" in the *HP Release Control Configuration Guide*.
	**Reset Time Line.** Returns you to the start time of the selected change request.
	**Now.** Displays the current date.
	Select a time frame over which to display the change requests. ➤ **Day**. Displays the change requests for the selected date only. ➤ **Week**. Displays the change requests for the week surrounding the selected date. ➤ **Month**. Displays the change requests for the month surrounding the selected date. By default, the time frame that appears depends on the duration and end time of the change request.

GUI Element (A-Z)	Description
	**Select Date.** Select the date you want to display. The calendar displays the week around the selected date. **Note:** The latest date which HP Release Control enables you to navigate to in the calendar is whichever of the following is longer: ➤ The current date + 60 days **Note:** The value 60 is the default which can be modified. For details on how to configure time periods, see "Configuring Time Periods" in the *HP Release Control Configuration Guide*. or ➤ The planned end date of the selected change + 30 days
<Selected change request in the timeline>	The selected change request in the timeline is represented by a thick, black line. 
<Selected date>	Displays the selected date. The calendar displays the day, week, or month around the selected date, depending on which time frame was selected.  You can either use the **Select Date**  button, or alternatively, scroll through by clicking the left/right arrows.

GUI Element (A-Z)	Description
<**Time period in the timeline**>	The time period in the timeline is displayed in the color defined by the HP Release Control administrator. 
<**Timeline**>	Displays the planned duration of the selected change request in a timeline as well as the time period categories to which the time period belongs.

Change Planner Dialog Box

Description	Enables you to simulate the effects of modifying the details of a change request. 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). **Note:** 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:** ➤ In the Change Requests/Action Items pane, select **View** > **Change Requests** and then click **Plan Selected Change**. or ➤ In the Analysis and Details pane, click **Assess** > **Time Period Conflicts** and then click **Plan Selected Change**. 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.
Included in Tasks	"Use the Change Planner to Reschedule a Change" on page 50

The following elements are included:

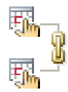
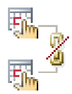
GUI Element (A-Z)	Description
	**Run Simulation.** Runs the change planner simulation. **Notes:** ➤ The simulated results are displayed in the Change Planner details pane. ➤ If you are planning an existing change and you are satisfied with the results of the simulation, you can save the updated planned start and end times of the change request to the originating service desk. The save action is only available if you are using HP Service Manager as your service desk.
	**Save.** Saves the updated planned times of the change request to your service desk. **Notes:** ➤ If you are simulating a new change, this option is not available. ➤ Available only if you are using HP Service Manager as your service desk. ➤ 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.
	**Open the Original Request.** Opens the Change Request in the originating service desk. **Notes:** ➤ If you are simulating a new change, this option is not available. ➤ To enable this option, see "Generating Links to HP Service Manager/Center Tickets" in the *HP Release Control Configuration Guide*.

Scheduling Pane

Description	Enables you to 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.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

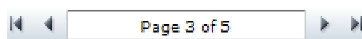
GUI Element (A-Z)	Description
	**Reset Time.** Enables you to restore the currently planned times.
	**Get Suggested Time**. Enables HP Release Control to suggest the next possible time for implementing the change, which is either within a **Change Window** and outside a **Blackout** period associated with the change request. HP Release Control does not suggest a time in the following cases: ➤ If there is no time periods associated with the change ➤ If the change is within a Blackout period and there is no future Change Window
<< >>	Scroll to the previous and next suggested times. **Note:** These button appear only if HP Release Control has suggested another time. They are only enabled when there is more than one possible suggested time.
Accept	Accept the time suggested by HP Release Control and run the change planner simulation according to the suggested time. **Note:** Appears only if HP Release Control has suggested another time.
Cancel	Restore the previous time. **Note:** Appears only if HP Release Control has suggested another time.

GUI Element (A-Z)	Description
Lock duration	Enables you to lock the duration of the change. 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.  Appears when this option is selected, that is, when the duration of the change is locked.  Appears when this option is not selected, that is, when the duration of the change is not locked.
Planned duration	The difference in time between the start time and the end time of the change request.
Planned end	Use the calendar to set the date and time for the planned end of the change request **Note:** If the change request does not include a planned end time, this box is empty.
Planned start	Use the calendar to set the date and time for the planned start of the change request **Note:** If the change request does not include a planned start time, this box is empty.

Change CIs Pane

Description	Enables you to select the CIs (CCIs) that have changed as part of the change request simulation.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Reset CIs.** Enables you to restore the current changed CIs.
	**Show Business CIs/System CIs.** Toggles between displaying either Business CIs or System CIs.
	**Find.** Search for a specific Business/System CI by entering the name or part of a name in the search box. The search returns all Business/System CIs that contain the entered string somewhere in the name. Click the **Find** button to run the search.
<View other pages>	To view other pages, use the left and right arrows. The number between the left and right arrows indicate which page is currently being displayed. For example, 3 of 5 means that the 3rd page out of 5 is being displayed. 
Available Business CIs/System CIs	Contains a list of the available Business/System CIs that can be used in the simulation. Select one or more of the required CIs (using the CTRL key) and then click the top arrow to move them to the **Selected CIs** list. The selected CIs are included in the simulation.
Selected CIs	Contains a list of the Business/System CIs to be included in the simulation. Select one or more of the required CIs (using the CTRL key) and then click the bottom arrow to move them to the **Available Business CIs/System CIs** list. The selected CIs are not included in the simulation.

Preview Tab

Description	Displays the current planned times of the change compared with the simulated times, as well as a summary of the current analysis results compared with the simulated analysis results.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Analysis Info Pane	Displays a summary of the current analysis results compared with the simulated analysis results. For more information, see "Preview > Overview Tab" on page 134.
Time Window Info Pane	Displays the current planned times of the change compared with the simulated time.

Impact Tab

Description	Displays the impact analysis of the simulation.
Important Information	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 "Assess > Impact Tab" on page 67.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Enables you to view the current impact analysis or the simulated impact analysis and select the relevant option from the list. **Note:** This option is relevant only if you are planning an existing change.

Collisions Tab

Description	Displays the collision analysis of the simulation.
Important Information	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 "Assess > Collisions Tab" on page 70.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Enables you to filter the information displayed in the tab and select 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 a result of the simulated settings. ➤ **Resolved Collisions.** Displays the collisions that are resolved as a result of the simulated settings. These collisions occur for the current settings and do not occur for the simulated settings. **Note:** This option is relevant only if you are planning an existing change.

Time Period Conflicts Tab

Description	Displays the time periods conflict analysis of the simulation.
Important Information	The information in this tab is presented in the same way as in the Analysis module's Assess > Time Period Conflicts tab. For more information about viewing time period conflict analysis results, see "Assess > Time Period Conflicts Tab" on page 85.

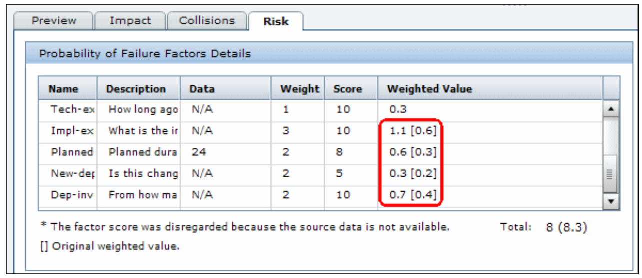
The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Enables you to filter the information displayed in the tab and select one of the following options from the list: ➤ **Current Time Conflicts.** Displays all the time period conflicts for the currently displayed date. ➤ **Simulated Time Conflicts.** Displays all the time period conflicts that occur when the simulated settings are applied. **Note:** This option is relevant only if you are planning an existing change.

Risk Tab

<table>
<tr><td>Description</td><td>Displays the risk analysis of the simulation.

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.


</td></tr>
<tr><td>Important Information</td><td>➤ 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 "Assess > Risk Tab" on page 78.
➤ This option is relevant only if you are planning an existing change.</td></tr>
</table>

Change Requests — Calendar View

Description	The Calendar view displays the change requests that have been processed by HP Release Control for each calendar day. A single page displays one calendar week. Each column represents a calendar day and each cell represents a single change request. Change requests appear in ascending order according to their scheduled start times. You can choose to display the configured time periods in the Calendar view. You do so by clicking the **Select 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 **Change Window** and **Blackout** 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. **To access:** In the Change Requests/Action Items pane, select **View** > **Change Requests** and then click **Calendar**.
Important Information	➤ 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 Calender view displays up to one hundred changes per calendar day. When a filter returns more than one hundred change requests per day, the Calendar view 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, see "Configuring Calendar Settings" in the *HP Release Control Configuration Guide*.

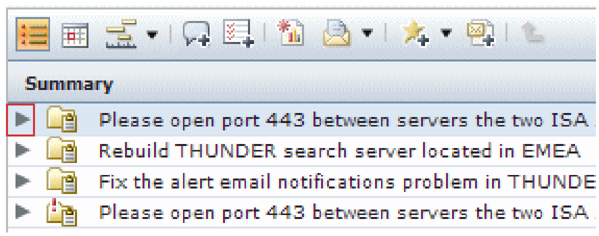
Unless otherwise customized by the administrator, the following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Collision severity	Displays the collision severity level of the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed. Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels: Critical High Medium Low Very Low For more information about collisions and how collision severity is calculated, see "Change Request Collisions" on page 41.

GUI Element (A-Z)	Description
Impact Severity	Displays the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the request. Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels: Critical High Medium Low Very low No impact analysis available For more information about impact analysis and how impact severity is calculated, see "Assess > Impact Tab" on page 67.

GUI Element (A-Z)	Description
Request Type	The request type icon indicates the following: ➤ The type of change request—that is, one of the following: **level 1** (by default, **change**) **level 2** (by default, **task**) **latent.** Indicates that the change request was detected by HP Release Control. A tooltip indicating the request type is visible when you hold the mouse pointer over this icon. ➤ Whether the request is scheduled to take place outside a **Change Window** period or within a **Blackout** period pertaining to the request. If so, a red exclamation point is included in the icon . A tooltip lists the time period category with whose rules the request does not comply is visible when you hold the mouse pointer over this icon. **Note:** The HP Release Control administrator configures time period categories and rules that apply to these categories. For more information, see "Configuring Time Period Settings" in the *HP Release Control Configuration Guide*. 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, see "Configuring Enumeration Field Display Settings" in the *HP Release Control Configuration Guide*.
User Discussion Threads & Posts	The presence of a user discussion threads & posts icon indicates that user discussion threads and comments exist in response to the selected change request. You can view the discussion threads themselves in the Collaboration tab's Discussion view. For more information, see "Collaborate > Discussion Tab" on page 119.

Change Requests — List View

<table>
<tr>
<td>Description</td>
<td>
The List view displays the change requests that have been processed by HP Release Control in the form of a sortable table. You can sort the order of appearance of the requests according to each column by clicking the appropriate column heading.
Parent requests (for example, changes) can be expanded to display all the child requests (for example, tasks). To expand or collapse parent requests, click the Expand button next to the request.


When you select a change request in the 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 "Analysis Preferences Dialog Box" on page 28.
To access: In the Change Requests/Action Items pane, select View > Change Requests and then click List.
</td>
</tr>
<tr>
<td>Important Information</td>
<td>
➤ You can filter the change requests displayed in the Change Requests mode. For details, see "Filtering Change Requests, Activities, and Action Items" on page 147.
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.
➤ You can customize the List view to display different information. For details on customizing the List view columns, see "Customizing the List View" in the HP Release Control Configuration Guide.
</td>
</tr>
</table>

Unless otherwise customized by the administrator, the following elements are included:

GUI Element (A-Z)	Description
Collision Severity	Displays an icon indicating the collision severity level of the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed. Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels: Critical High Medium Low Very Low If there are no collisions with the change request, no collision severity icon is displayed. A tooltip indicating the severity level of the collision is visible when you hold the mouse pointer over the collision severity icon. For more information about collisions and how collision severity is calculated, see "Change Request Collisions" on page 41.
Contact Person	Displays the name of the user responsible for the change request.

GUI Element (A-Z)	Description
Impact Severity	Displays an icon indicating the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the request. Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels: Critical High Medium Low Very low No impact analysis available A tooltip indicating the impact severity level of the change request is visible when you hold the mouse pointer over the severity level icon. For more information about impact analysis and how impact severity is calculated, see "Impact Analysis" on page 35.
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.
Request ID	Displays the reference ID number of the change request in the service desk application.

GUI Element (A-Z)	Description
Risk	Displays a number from 0-100 that indicates the risk level of the selected change request relative to the other change requests. A higher number indicates a higher risk level. 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. 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 "Risk Analysis" on page 36.
Start	Displays the date on which the change request is scheduled to begin.
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.

GUI Element (A-Z)	Description
Summary	Displays a brief overview of the change request. The icon next to the overview sentence indicates the following: ➤ The type of change request—that is, one of the following: **level 1** (by default, **change**) **level 2** (by default, **task**) **latent.** Indicates that the change request was detected by HP Release Control. A tooltip indicating the request type is visible when you hold the mouse pointer over this icon. ➤ Whether the request is scheduled to take place outside a **Change Window** period or within a **Blackout** period pertaining to the request. If so, a red exclamation point is included in the icon . A tooltip lists the time period category with which the rules the request does not comply is visible when you hold the mouse pointer over this icon. **Note:** The HP Release Control administrator configures time period categories and rules that apply to these categories. For more information, see "Configuring Time Period Settings" in the *HP Release Control Configuration Guide*. 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, see "Configuring Enumeration Field Display Settings" in the *HP Release Control Configuration Guide*.
User Discussion Threads & Posts	The presence of a user discussion threads & posts icon indicates that user discussion threads and comments to these threads exist in response to the selected change request. A tooltip indicating how many discussion threads and comments exist is visible when you hold the mouse pointer over this icon. You can view the discussion threads themselves in the Collaboration tab's Discussion view. For details, see "Collaborate > Discussion Tab" on page 119.

Change Requests — Timeline View

Description	The Timeline view displays the change requests that have been processed by HP Release Control in the form of a timeline. It display the change requests, implementors, and business CIs in the context of their schedules. 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. 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. For details, see "Details and Analysis Pane" on page 126. You can choose one of the following view types: ➤ Change requests ➤ Business CIs ➤ Implementors **To access:** In the Change Requests/Action Items pane, select **View** > **Change Requests**, click **List** and then choose the required view type.
Important Information	When filtering Timeline views, the Change requests, Business CIs, and Implementors views all display the results as defined by the filtering mechanism. But, in the Business CI and Implementor Timeline views, the filtering results only include results that are applicable to that group. For example, a change request that does not affect any CI is not displayed in the timeline group of business CIs. For details on working with filters, see "Filtering Change Requests, Activities, and Action Items" on page 147.

Unless otherwise customized by the administrator, the following elements are included:

GUI Element (A-Z)	Description
Business CI view	Each row displays the change request for a single business CI. Change requests that overlap are indicated by a darker shade at the point at which they overlap. You can display all of the change requests associated with a single business CI by clicking the arrow next to the relevant business CI.
Change Request view	Displays change requests, where each change request is displayed on a separate row.
Impact Severity Levels	Displays the impact severity level of the change request, indicated by the color of the block. 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: ➤ **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 "Impact Analysis" on page 35.

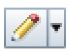
GUI Element (A-Z)	Description
Implementor view	Each row displays the change request for a single implementor. Change requests that overlap are indicated by a darker shade at the point at which they overlap. You can display all of the change requests associated with an implementor by clicking the arrow next to the implementor name.
Time period-related data	Indicates whether the change request is scheduled to be executed within one of the configured **Change Window** periods pertaining to the request. The color of the block frame can be one of the following: ➤ A white frame indicates that the change request is scheduled to take place during one of the **Change Window** periods that is configured for a time period category in which the selected change request is included. ➤ A black frame indicates that there is a time period conflict and the change request falls either outside a **Change Window** period or within a **Blackout** 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.

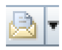
Change Requests Pane

Description	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 views: ➤ **List.** Displays change requests in list format. For details, see the "Change Requests — List View" on page 103. ➤ **Calendar**. Displays the change requests in calendar format. For details, see the "Change Requests — Calendar View" on page 99. ➤ **Timeline**. Displays the change requests in timeline format. For details, see the "Change Requests — Timeline View" on page 108. **To access:** In the Change Requests/Action Items pane, select **View** > **Change Requests**.
Important Information	You can filter the change requests displayed in the Change Requests mode. For details, see "Filtering Change Requests, Activities, and Action Items" on page 147. 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.
Useful Links	"Action Items" on page 34

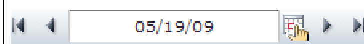
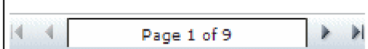
The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**List.** Displays the Change Requests in a list format. Opens the Change Requests — List View.
	**Calendar.** Displays the Change Requests in a calendar format. Opens the Change Requests — Calendar View.

GUI Element (A-Z)	Description
	**Timeline.** Displays the Change Requests in a timeline format. Click the drop-down arrow and select one of the following options: ➤ **Group by Change Request.** ➤ **Group by Business CI.** ➤ **Group by Business CI.** Opens the Change Requests — Timeline View.
	**Plan Selected Change.** Enables you to simulate the effects of modifying the details of a change request and to view how these modifications influence the analysis data. Click the drop-down arrow and select one of the following options: ➤ **Plan Selected Change.** ➤ **Plan New Change.** Opens the Change Planner.
	**New Discussion Thread.** Enables you to add a new thread to the discussion in the Votes pane in the Collaborate > Discussion tab. Opens the New Discussion Thread dialog box.
	**New Action Item.** Used to create an action item associated with the request. Opens the Add Action Item dialog box.
	**Generate Report.** Enables you to generate a PDF, an HTML report, or an Excel report. Opens the Report Details dialog box. **Note:** Appears only in the List and Calendar views.

GUI Element (A-Z)	Description
	**Send by E-mail.** Enables you to send discussion threads by email. Click the drop-down arrow and select one of the following options: ➤ **Send Change data.** Send an email containing only the selected change request. ➤ **Send Change data and log.** Send an email containing the selected change request as well as the event log information associated with it. ➤ **Send CAB invitation.** Send an invitation to the CAB meeting. ➤ **Send CAB minutes.** Send the CAB minutes of the selected change. ➤ **Send PIR invitation.** Send an invitation to the PIR meeting. ➤ **Send PIR minutes.** Send the PIR minutes of the selected change.
	**Add Selected Request to Favorites/ Delete Selected Request from Favorites**. Toggles between adding or removing the selected change request from the Favorites filter. For details, see "Filtering Change Requests, Activities, and Action Items" on page 147. Click the drop-down arrow and select one of the following options: ➤ **Delete from Favorites.** Deletes the selected change request from the Favorites filter. ➤ **Delete all AI's in the Favorites Filter.** Deletes all the change requests in the Favorites filter. **Note:** You can also subscribe to receive notifications when certain modifications are made to favorite change requests. For details, see "Analysis Preferences Dialog Box" on page 28.

GUI Element (A-Z)	Description
	**Subscribe to Selected Request/Unsubscribe from Selected Request**. Enables you to receive email notifications or cancel a notification subscription for the selected change request. For information on configuring notification rules and conditions, see "Configuring Notifications" in the *HP Release Control Configuration Guide*.
	**Go to Parent Request.** Displays the parent change request for the selected child change request (task). **Note:** Appears only in the List view.
	**Zoom in/Zoom out.** Enables you to select the required focus time range. **Note:** Appears only in the Timeline view.
	**Select Time Period.** Enables you to select the configured time periods to display in the background of the Timeline and Calendar views. For information on how to configure time periods, see "Configuring Time Periods" in the *HP Release Control Configuration Guide*. **Note:** Appears only in the Calendar and Timeline views.
	**Now.** Display the current date. **Note:** Appears only in the Calendar and Timeline views.
	Select a time frame over which to display the change requests. Following are the options: ➤ **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. **Note:** Appears enabled only in Timeline mode.

GUI Element (A-Z)	Description
	**Select Date.** Select the date you want to display. The calendar displays the week around the selected date. **Note:** Appears only in the Calendar and Timeline views.
<Display the selected date>	Displays the selected date. The calendar displays the week around the selected date.  You can either use the **Select Date**  button, or alternatively, scroll through the weeks by clicking the left/right arrows. **Note:** Appears only in the Calendar and Timeline views.
<View other pages>	To view other pages, use the left and right arrows. The number between the left and right arrows indicate which page is currently being displayed. For example, 3 of 5 means that the 3rd page out of 5 is being displayed.  **Note:** Appears only in the List view.

Change Requests/Action Items Pane

Description	Displays a list of change requests or action items, depending on the mode that you select. You use the View box in the top left-hand corner of the Analysis module to switch between the following two modes: ➤ **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**. For detailed information on each of these views, see the "Change Requests Pane" on page 111. ➤ **Action Items mode.** Displays action items that have been created from change requests as well as the basic information and user comments for each action item selected from the list. For details, see the "Action Items Pane" on page 56. **To access:** Select **Module** > **Analysis** > **View** > **Change Requests/Action Items**.
Important Information	For information on using the filter mechanism to display only those action items that meet certain criteria, see "Filtering Change Requests, Activities, and Action Items" on page 147.
Useful Links	"Action Items" on page 34

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Navigate between the Change Request and Action Item modes, and their filter selections. For more details, see "Filtering Change Requests, Activities, and Action Items" on page 147.
	**Search for Request/Action Item ID.** Locate a required change request or action item. ➤ In the Change Request pane, enter a search request ID in the **Search for Change Request** box to locate the required changed request in the list of change requests. ➤ In the Action Item pane, enter an action item ID in the **Search for Action Item** box to locate the required action item in the list of action items.
	**Refresh.** Enables you to refresh the change requests displayed in the Change Requests pane or the action items displayed in the Action Items List pane.
Change Requests/ Action Items	Enables you to filter change requests and action items.
Results	The number of change requests or action items that meet the set of criteria you defined.
View	Enables you to switch between the Change Request and Action Item mode.

Collaborate > Action Items Tab

Description	Enables you to view the change request's action items. ➤ If you are in 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 Action Items mode, this tab enables you to view all the action items associated with the same change request as the selected action item. **To access:** In the Analysis and Details pane, click **Collaborate** > **Action Items** tab.
Useful Links	"Action Items" on page 34

Action Items Pane

Description	Displays the action items associated with a change request. For information on this pane, see "Action Items Pane" on page 56.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Displays the selected action item in the Action Items pane.

Action Item Postings Pane

Description	Displays information for each action item selected from the list. For information on this pane, see "Action Items Pane" on page 56.

Collaborate > Discussion Tab

Description	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. **To access:** In the Analysis and Details pane, click the **Collaborate** > **Discussion** tab.

Comments Pane

Description	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.

The following elements are included:

GUI Element (A-Z)	Description
	**Expand All Comments.** Enables you to expand all the comments included in the discussion threads.
	**Collapse All Comments.** Enables you to collapse all the comments included in the discussion threads.
	**Older First / Newer First.** Enables you to sort the comments to either display the oldest comment first or the newest comment first.

GUI Element (A-Z)	Description
	**New Discussion Thread.** Enables you to add a thread to any change request. Opens the New Discussion Thread dialog box.
	**Send E-Mail.** Enables you to send one or more discussion threads by email. Opens the Send Email dialog box opens. Enter the email address of each recipient of the email and any additional comments you have on the change request.

Votes Pane

Description	Displays a summary of the most recent votes posted by discussion initiators for the change request.

The following element is included:

GUI Element (A-Z)	Description
<Voting summary tree>	Displays 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. 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, all the discussion threads initiated by that user are displayed in the Comments pane. To view all the discussion threads initiated by all the users in the Comments pane, click **All**. To sort the discussion threads chronologically, click the **Older First/ Newer First** button. **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.

Collaborate > Resolution Tab

Description	Enables you to approve a change request or retract the approval, view approval history and status, and create CAB minutes and as pre- and post-implementation guidelines. **To access:** In the Analysis and Details pane, click **Collaborate** > **Resolution** tab.

Change Approval Pane

Description	Enables you to approve a change request or retract the approval, and view approval history and status. The approve and retract options depend 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. To check whether your service desk application supports the approval/retraction feature, contact customer support.
Important Information	When you approve a change request, 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.

The following elements are included:

GUI Element (A-Z)	Description
	**Approval Log.** Displays a history of approvals and retractions made in HP Release Control for the selected change. The users who approved the change request or retracted approval are listed, along with comments that they posted.
	**Approval Status.** If you are using HP Service Manager/ Center as your service desk, you can view the approval status of the selected change 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, see "Configuring HP Service Manager/Center" in the *HP Release Control Configuration Guide*.

GUI Element (A-Z)	Description
 	**Approve.** Enables you to approve a change request. Opens the Approve Change Request dialog box. **Retract.** Enables you to retract the approval you gave for the selected request. Opens the Retract Change Request dialog box. For more information about approving or retracting a change request, see "Approve/Retract Change Request Dialog Box" on page 66. When you select the relevant change request, or action item in the Change Requests or Action Items pane, and then select the **Collaborate** > **Resolution** tab, the **Checking** status message is displayed as the tooltip for the **Approve** and **Retract** buttons 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 as a tooltip for **Approve** and **Retract** buttons. 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 as the tooltip for the **Approve** button. If an error occurred during the HP Release Control verification process, an error message is displayed as the tooltip for the **Approve** and **Retract** buttons.

CAB Decisions Pane

Description	Enables you to post different types of notes regarding the approval/retraction process.
Important Information	To perform this procedure, you must be a user with the role of **Change Manager**.

The following element is included:

GUI Element (A-Z)	Description
	**Add Decision**. Enables you to post different types of notes regarding the approval/retraction process. Opens a dialog box in which you can 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. Enter the subject and content of the note in the dialog box that appears. The note appears in the CAB Decisions pane.

Details and Analysis Pane

Description	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 analysis data for the selected or associated change request. ➤ **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. ➤ **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. **To access:** Select **Module** > **Analysis**.
Important Information	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.

Impact Graph Window

Description	Displays a visual representation of the impact relationships of the selected change request. You can manipulate the display by dragging and dropping individual CIs. The lines, arrows, and relationships are not 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 access:** Click **Open Graph Window** in the Assess > Impact tab.

The following elements are included:

GUI Element (A-Z)	Description
	Root Node. Returns the Impact Graph window to the original display if an impact graph for individual CIs or groups of CIs is the current view.
	Concentric Radial Layout. Reorganizes the CIs in concentric radial layout.
	Hierarchy Layout. Reorganizes the CIs in hierarchy layout.
	Parent-Centered Radial Layout. Reorganizes the CIs in Parent-Centered Radial Layout.
	Spring Forced Layout. Reorganizes the CIs in Spring Forced Layout
	Zoom. Enables you to change the magnification by zooming in or out.

GUI Element (A-Z)	Description
All Impact CIs Affect	Displays a visual representation of the impact relationships in graphic format. 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 customize the impact graph layout to reorganize the CIs while still maintaining the same impact relationships.
Impact CIs	Displays the affected and changed CIs (ACIs and CCIs).

New Discussion Thread Dialog Box

Description	Enables you to add a discussion thread to any change request. As part of the discussion thread, you can express an opinion about the change by selecting the required voting option. 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 > Discussion tab. **To access from the Change Requests pane:** In the Change Requests/Action Items pane, select **View** > **Change Requests**. and then click **New Discussion Thread**. **To access from the Analysis and Details pane:** Click **Collaborate** > **Discussion** tab, and then click **New Discussion Thread**.
Useful Links	"Collaborate > Discussion Tab" on page 119

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
<Message box>	(Optional) Type the required message.
Subject	Type the required subject.
Voting	Select one of the following voting options. ➤ **Disagree** ➤ **To CAB** ➤ **Agree** ➤ **No Vote** 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.

Post Implementation Review Dialog Box

Description	Enables you to create/edit a PIR for a change request. The PIR is added to the change request and all submitted PIR information appears in the Conclusions Information pane of the **Review** > **Conclusions** tab. **To access:** In the Details and Analysis pane, click the **Review** > **Conclusions** tab, and then click **Review** in the Conclusion Information pane.
Important Information	➤ By default, HP Release Control enables you to create a PIR for a change request only with an **Evaluation and Closure** status. ➤ If you are working with HP Service Manager, HP Release Control updates the PIR information directly to that application.
Useful Links	"Review > Conclusions Tab" on page 142

Details Tab

Description	Enables you to create/edit a PIR for the selected change request.

The following elements are included:

GUI Element (A-Z)	Description
Change outcome	Select the change request's outcome 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.
Planning satisfaction	Select the overall level of planning satisfaction for the request from the drop down list.
Review comments	Add any comments that may be relevant.
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. If you are editing a PIR, we recommend that you do not change this.
Service desk authentication	If you are working with HP Service Manager, enter your user name 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.

Disrupted Business CIs

Description	Displays the business CIs that are included in the PIR. The business CIs you include in the PIR appear in the Disrupted Business CIs pane of the **Review** > **Conclusions** tab.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Show only impacted business CIs/Show all business CIs.** Toggles between displaying: ➤ A list of all business CIs that are impacted by the current request (Show only impacted business CIs). ➤ A list of all the relevant business CIs that HP Release Control recognizes in the HP Universal CMDB (Show all business CIs).
	**Show Obsolete**. View the obsolete business CIs.
	**Find.** Search for a specific business CI in the Available Business CIs list by entering the name or part of a name in the search box. The search returns all business CIs that contain the entered string somewhere in the name. Click the **Find** button to run the search.
<View other pages>	To view other pages, use the left and right arrows. The number between the left and right arrows indicate which page is currently being displayed. For example, 3 of 5 means that the 3rd page out of 5 is being displayed. 

GUI Element (A-Z)	Description
Available Business CIs	Contains a list of the available business CIs that are either impacted by the current request or business CIs that HP Release Control recognizes in the HP Universal CMDB. To include one or more of the business CIs in the PIR, select the required CIs (using the CTRL key), and then click the top arrow to move them to the **Disrupted Business CIs** list.
Disrupted Business CIs	Contains a list of the business CIs to be included PIR. To remove one or more of the business CIs from the PIR, select required CIs (using the CTRL key) and then click the bottom arrow to move them to the **Available Business CIs** list.

Preview > Details Tab

Description	Displays the change request details that originate from the service desk application and some key analysis data processed by HP Release Control. **To access:** In the Analysis and Details pane, click the **Preview** > **Details** tab.
Important Information	For details on customizing the Preview > Details tab, see "Customizing the Preview > Details Tab" in the *HP Release Control Configuration Guide*.

Unless otherwise customized by the administrator, the following elements are included:

GUI Element (A-Z)	Description
Actual end	The time at which execution of the change request actually ended.
Actual start	The time at which execution of the change request actually began.

GUI Element (A-Z)	Description
Category	The category describing the type of change request.
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.
Created	The time at which the change request was originally created in the service desk application.
Emergency	Indicates that the change request is handled according to the Emergency Change procedure.
Estimated risk	The estimated risk level that was assigned to the change request by a user.
Impact severity	The HP Release Control-calculated impact severity level of the change request. For more details about impact severity, see "Impact Analysis" on page 35.
Implementors	The people responsible for implementing the change request.
Initiated by	The person initiating the request (first level change requests only).
Last impact analysis	The time at which an impact analysis was last calculated.
Last updated	The time at which the change request was last updated in the service desk application.
Opened by	The person initiating the request (second level change requests only).
Planned end	The time at which the execution of the change request is scheduled to end.
Planned start	The time at which the execution of the change request is scheduled to begin.
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.

GUI Element (A-Z)	Description
Request ID	The reference ID number of the change request in the service desk application.
Requested end date	The latest date by which to implement the request.
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 how the risk level is calculated, see "Risk Analysis" on page 36.
Scheduled downtime start	The change activity's planned downtime start time.
Service desk	The service desk application in which the change request originated.
Subcategory	Elaborates on the **category** field, and describes the type of change request in further detail.
Urgency	The urgency assigned to the request by the request initiator.

Preview > Overview Tab

Description	Displays a summary of the change request information received from the service desk application. **To access:** In the Analysis and Details pane, click the **Preview** > **Overview** tab.

The following elements are included:

GUI Element (A-Z)	Description
Analysis Info	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 "Impact Analysis" on page 35. ➤ **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 "Change Request Collisions" on page 41. ➤ **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 how the risk level is calculated, see "Risk Analysis" on page 36.

GUI Element (A-Z)	Description
Analysis Info (con't)	➤ **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. ➤ **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. ➤ **Time period conflicts.** If the change request breached the recurrence rules of a time period category, the name of the category is displayed. The displayed category serves as a link to the Assess > Time Period Conflicts tab.

GUI Element (A-Z)	Description
General Info	➤ **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.
User Info	➤ **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 data links to the Collaborate > Discussion tab. For details, see "Collaborate > Discussion Tab" on page 119.

Report Details Dialog Box

Description	Enables you to 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. Opens the Report Details dialog box. **To access:** In the Change Requests/Action Items pane, select **View** > **Change Requests**. In either the List or Calendar view, select the change request, page, or filter for which you want to create a report and click **Generate Report**.
Important Information	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**
Useful Links	For information on customizing reports, see "Customizing Reports" in the *HP Release Control Configuration Guide*.

The following elements are included:

GUI Element (A-Z)	Description
Level Policy	Enables you to define whether you want to include child change requests (tasks) as well as parent change requests (changes) in the report. Select: ➤ **Collapsed**, to include data for parent change requests (changes) only. ➤ **Expanded**, to include child change requests (tasks) as well as parent change requests (changes) in the report. **Note: Collapsed** is the default value.
Output type	Select the required report output type. The options are: ➤ **PDF** ➤ **Excel** **Note:** The **Excel** option only appears when you select **List** as your Request Layout option. ➤ **HTML**
Request layout	Choose the required request layout option: ➤ **One page.** Displays the data for each change request on a separate page. **Note:** The **One page** option only appears in List view mode. ➤ **List.** Displays the data for each change request concisely, in a list format. Several lists are displayed on each page.
Request range	Depending on the data you want to view in the report, choose the required request range. The options are: ➤ **Selected change request** ➤ **Current page** ➤ **Current filter**

Respond Dialog Box

Description	Enables: ➤ Any HP Release Control user can add a comment to any action item that is not closed. ➤ The assignee of an action item to return the action item to its creator, if, for any reason he/she does not want to accept it. ➤ The assignee of an action item to change the status of an action item from **Open** to **Done**. ➤ The creator of an action item to change the status of an action item from **Open** or **Done** to **Closed**. **To access:** In the Change Requests/Action Items pane, select **View** > **Action Items**. In the Action Items pane, select the required action item and click Respond.
Important Information	The Respond button is enabled only when the action item selected is assigned to the current user.

The following elements are included:

GUI Element (A-Z)	Description
Description	➤ If you have selected **Post and pend the action item on <creator>**, enter the reason why you do not want to accept the action item. ➤ If you have selected **Respond with a post**, enter the full text of your comment.
Inform <creator> that the action item is done	Enables the assignee to change the status of an action item from **Open** to **Done**. For details about the statuses of action items, see "Status" on page 61. **Note:** This option appears when the selected action item is assigned to the current user and does not yet have a **Done** status.

GUI Element (A-Z)	Description
Post and pend the action item on <creator>	Enables you, as the assignee, to return the action item to its creator if for any reason you do not want to accept it. **Send it back to: <creator>** appears in the **Subject** box. **Note:** Your action is now listed as a comment in both the Action Items List pane and the Collaboration tab's Action Items view pane. The action item is now listed as pending on the creator.
Reopen the action item and inform <assignee> that it needs more work	Enables the creator to change the status of an action item from **Done** to **Reopen** or **Closed**.
Respond with a post	Enables any HP Release Control user to add a comment to any action item that is not closed. When the action item is selected in either the Action Items List pane or the Collaboration tab's Action Items view, the comment appears in the Action Item Posting pane.

Review > Conclusions Tab

Description	Enables the Change Reviewer to: ➤ Add review notes to any change request with an **Evaluation and Closure** status. ➤ Close the request so that no further modifications can be made to it. 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. **To access:** In the Analysis and Details pane, click the **Review** > **Conclusions** tab.
Important Information	➤ The Change Reviewer can use the **Send by E-mail** 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. ➤ You can define a change request filter according to review-related criteria. For details, see "Filtering Change Requests, Activities, and Action Items" on page 147.
Useful Links	"Post Implementation Review Dialog Box" on page 129

Conclusion Information Pane

Description	Enables you to create/edit a PIR for any change request with an **Evaluation and Closure** status. If you are working with HP Service Manager, you can also close the request so that no more modifications can be made to it.
Important Information	The **Close** button in this pane is available only if you are working with HP Service Manager. If you are using any other service desk application, the **Close** button is disabled.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	If you are fully integrated with HP Service Manager, enables you to create/edit a PIR for any change request whose status is not **Closed**. Opens the Post Implementation Review dialog box. **Note:** If you are using any other service desk application, the button is disabled.
	If you are fully integrated with HP Service Manager, enables you to close the request directly to HP Service Manager so that no more modifications can be made to it. **Note:** If you are using any other service desk application, the button is disabled. Opens the Login dialog box. Enter your HP Service Manager user name and password. If the operation is successful, the ticket is updated in HP Service Manager, which then updates the request in HP Release Control to a **Closed** status.
<Conclusion information>	Contains the review information entered in the Post Implementation Review dialog box for the selected request.

Disrupted Business CIs Pane

Description	Displays the disrupted business CIs selected in the Post Implementation Review dialog box to be included in the PIR.

Review > Event Log Tab

Description	Displays events related to activities. These can be user- or system-induced events. For information on what the Event Log displays, see "Event Log Tab" on page 184. ➤ **To access in Analysis module:** In the Details and Analysis pane, click the **Review** > **Event Log** tab. ➤ **To access in Director module:** In either the Activity Timeline or Alerts pane, click **Activity Information** to open the Activity Information dialog box. Then click the **Event Log** tab.

Review > Verifications Tab

Description	Enables you to view data for **detected** and **latent** changes. The selected request's detected changes are displayed along with information received from the HP Universal CMDB. For more information on detected and latent changes, see "Detected and Latent Changes" on page 46. 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. 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. **To access:** In the Analysis and Details pane, click **Review** > **Verifications** tab.

Important Information	➤ This feature may not be available in your HP Release Control application. For more information, contact your HP Release Control administrator. ➤ This section assumes that the latent change feature is fully activated.

5

Filtering Change Requests, Activities, and Action Items

This chapter includes:

Change Request, Activity, and Action Item Filter Overview

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.

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

For details on the Analysis module, see "Analysis Module" on page 33. For details on the Director module, see "Director Module" on page 175.

This section also includes:

➤ "Using Filters in the Analysis Module" on page 148

➤ "Using Filters in the Director Module" on page 150

Using Filters in the Analysis Module

You use the filter mechanism in the Filters pane 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. For details, see "Change Requests/Action Items Pane" on page 116.

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 150.

➤ 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 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 150.
- 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 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 are not 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** are included in the filter. Similarly, if you enter **steve, da***, both **steve** and any string that begins with **da** are 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** are 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** is included in the filter.

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

Create a Union Filter - Use-Case Scenario

In your next Change Advisory Board meeting, you are going to discuss change requests that are scheduled to be implemented during the first week in June 2009 that are high risk, collide critically with other requests, or have been voted on prior to the CAB.

This task describes how to create a union filter that displays the change requests whose criteria meet these conditions.

This task includes the following steps:

- "Define a New Filter" on page 151
- "Combine the Next CAB Meeting Filter with Existing Filters" on page 151
- "Results" on page 151

1 Define a New Filter

Select **Module** > **Analysis**. In the Change Requests/Action Items pane, click the downward arrow to the right of the **Change Requests** box and select **New**. Define a new filter called **Next CAB Meeting**. In the **Time** tab, select the first week in June under **Planned within**. For more information on how to define a filter, see "Activity Filter/Change Request Filter/Action Item Filter Dialog Box" on page 152.

2 Combine the Next CAB Meeting Filter with Existing Filters

In the **Union Filters** tab. Select the **Critical collisions**, **High risk**, and **Voted to CAB** filters that were previously defined in HP Release Control. For more information on the **Union Filters** tab, see "Activity Filter/Change Request Filter/Action Item Filter Dialog Box" on page 152.

3 Results

When you select the **Next CAB Meeting** filter, HP Release Control displays all the change requests that are scheduled for the first week in June 2009 and meet any one of the following criteria:

- Risk = high
- Collision severity = critical

- Contain votes to CAB

Filtering User Interface

This section describes (in alphabetical order):

- Activity Filter/Change Request Filter/Action Item Filter Dialog Box on page 152
- Filters Selection List on page 168
- Save Filter Dialog Box on page 170

Activity Filter/Change Request Filter/Action Item Filter Dialog Box

Description	Creates 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. You filter activities according to different criteria. These criteria are divided into predefined filter categories. You can also combine the results of the current filter with other existing filters in the **Union Filters** tab. ➤ **To access in the Director module:** Select **Module** > **Director**. In the Activities Timeline pane, click the downward arrow to the right of the **Activities** box and select **New** or **Edit**. ➤ **To access in the Analysis module:** Select **Module** > **Analysis**. In the Change Requests/Action Items pane, click the downward arrow to the right of the **Change Requests** or **Action Items** box and select **New** or **Edit**.

Important Information	➤ 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 only see results that meet both these criteria (**Priority: High** and **Impact Severity: Critical**). ➤ The HP Release Control administrator can remove some of the pre-defined filter criteria. Some of the criteria listed in the description of the **General**, **Analysis Data**, **Business CIs**, and **Union Filters** tabs, 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 Activity Filter dialog box. For details on creating customized filters, refer to the *HP Release Control 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 cannot edit time-related criteria in the Director module.
Included in Tasks	"Create a Union Filter - Use-Case Scenario" on page 151

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Clear.** Clear all the selected filter properties.

GUI Element (A-Z)	Description
	**Save As.** Save your filter settings. Opens the Save Filter dialog box.
	**View Filtered Results.** View the filter results in the Activity Timeline pane without saving the filter.

General Tab

Description	Contains filter criteria which are based on fields that originate in the service desk application. **To access**: Click the **General** tab in the Activity Filter/ Change Request Filter/Action Item Filter dialog box.

The following elements are included when you create a filter for change requests and activities (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Category	Filters change requests according to category.
Change type	Filters activities according to their request type. The following options are available: ➤ **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 "Detected and Latent Changes" on page 46. ➤ **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.

GUI Element (A-Z)	Description
Contact person	Filters change requests according to the contact people responsible for the change requests. For a list of the regular expressions that can be used, see "Regular Expressions" on page 150.
Detection status	Filters change requests according to the way in which they were detected. The following options are available: ➤ **Not detected.** Displays regular change requests scheduled in HP Release Control. ➤ **Detected.** Displays latent changes, or change requests that contain detected changes. For more information, see "Detected and Latent Changes" on page 46. **Note:** Relevant to Analysis module only. Available only if the **Latent** change feature is configured.
Emergency	Filters change requests as follows: ➤ **True.** Change requests that were handled in an emergency procedure. ➤ **False.** Change requests that were not handled in an emergency procedure.

GUI Element (A-Z)	Description
Hierarchy level	Filters activities according to their hierarchical structure. The following options are available: ➤ **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. If you do not filter activities 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. **Note:** The names of the top-level and second-level change requests can be configured in the **enumeration-labels.properties** file. For more information, see "Configuring Enumeration Field Display Settings" in the *HP Release Control Configuration Guide*. In addition, if you modify the names of the top-level and second-level requests, you should modify the **filters.constraints.hierarchy.@@CHANGES_AND_ORPHANS_TASKS@@** resource in the <**HP Release Control installation directory**>**\tomcat\webapps\ccm\WEB-INF\classes\onyxCommonResources.properties** file accordingly, so that the last option in this selection box does not read **Changes and Independent Tasks**.
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 150.
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.

GUI Element (A-Z)	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.
Subcategory	Filters change requests according to subcategory.

The following elements are included when you create a filter for action items (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
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 to locate and select the assignee in the Select Users dialog box.
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 Users 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.
Priority	Filters change requests according to their priority levels. You can select one or more of the listed priority levels. The priority levels are determined in the service desk application.
Status	Filters change requests according to their statuses. You can select one or more of the listed statuses. The status is determined in the service desk application.

Analysis Data Tab

Description	Describes the filter criteria, which are based on the calculations that HP Release Control performs during the processing of change requests. **To access**: Click the **Analysis Data** tab in the Activity Filter/Change Request Filter/Action Item Filter dialog box.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Calculated risk	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. Enter or select a range using the boxes provided. For more information about the calculation of risk levels, see "Risk Analysis" on page 36.
CIs	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. For a list of the regular expressions that can be used, see "Regular Expressions" on page 150. 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. **Note:** If you use the NOT regular expression, the filter excludes 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 is still displayed in the results.
Collision severity	Filters change requests according to their collision severity levels. You can select one or more of the listed collision severity levels. Collision severity is calculated by HP Release Control. For more information about collision severity, see "Change Request Collisions" on page 41.

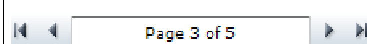
GUI Element (A-Z)	Description
Collision type	Filters change requests according to the types or causes of the collisions. You can select one or more of the listed collision causes. For more information about collision causes, see "Change Request Collisions" on page 41. **Note:** If you defined a custom collision cause, you can select the name of the field you specified as a collision cause. **Note:** Relevant to the Analysis module only.
Discussion created	Filters change requests according to the time at which request discussion threads and comments were added. **Note:** Relevant for the Analysis module only.
Impact severity	Filters change requests according to their impact severity levels. You can select one or more of the listed impact severity levels. Impact severity is calculated by HP Release Control. For more information about impact severity, see "Impact Analysis" on page 35. **Note:** You cannot filter by impact severity level if you selected **Requests with unknown impact** in the **Business** tab.

GUI Element (A-Z)	Description
Time period conflicts	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, see "Configuring Time Periods" in the *HP Release Control Configuration Guide*. **Note:** Relevant to the Analysis module only. 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.
Voted as	Filters change requests according to the user votes they received. You can select one or more of the listed voting options. Users can express their opinion about a change request by posting a vote (**Disagree**, **To CAB**, **Agree**, **No vote**) regarding the request. For more information on change request voting, see "Collaborate > Discussion Tab" on page 119. **Note:** Relevant for the Analysis module only.

Business CIs Tab

Description	Filters change requests according to impact. **To access**: Click the **Business CIs** tab in the Activity Filter/ Change Request Filter/Action Item Filter dialog box.
Useful Links	"Regular Expressions" on page 150

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Show Obsolete.** Toggle between hiding and displaying the obsolete CIs. **Note:** Available only when you select the **Requests affecting selected business CIs** option.
	**Find.** Search for a specific business CI by entering the name or part of a name in the search box. The search returns all business CIs that contain the entered string somewhere in the name. Click the **Find** button to run the search.
	Move the selected business CIs from the **Available Business CIs** list to the **Selected Business CIs** list. The business CI is included in the filter.
	Move the selected business CIs from the **Selected Business CIs** list to the **Available Business CIs** list. The business CI is not included in the filter.
<View other pages>	To view other pages, use the left and right arrows. The number between the left and right arrows indicate which page is currently being displayed. For example, 3 of 5 means that the 3rd page out of 5 is being displayed. 
All requests	Displays all change requests.
Available Business CIs	The list of available business CIs. **Notes:** ➤ Available only when you select the **Requests affecting selected business CIs** option. ➤ You can select multiple business CIs using the CTRL key.
Requests affecting any business CI	Displays change requests whose impact analysis results affect any business CI.

GUI Element (A-Z)	Description
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 only change requests for which there are no impact analysis results
Requests with unknown impact	Displays only change requests for which there are no impact analysis results
Selected Business CIs	Displays the business CIs you want to include in the filter. **Notes:** ➤ Available only when you select the **Requests affecting selected business CIs** option. ➤ You can select multiple business CIs using the CTRL key.

Time Tab

Description	Filters change requests according to time-related criteria by selecting one or more of the time-related options. From the box adjacent to each filter criterion that you selected, select the desired option from the drop-down list. If you selected **After**, **Before**, or **Between**, click the calendar button and select a date and time. **Note:** You select time intervals according to your machine's time zone, as indicated in the calendar box. **To access**: Click the **Time** tab in the Activity Filter/ Change Request Filter/Action Item Filter dialog box.
Important Information	This tab is only available in the Analysis mode.

The following elements are included when you create a filter for change requests and activities (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Actual end	Filters change requests according to their actual execution end time.
Actual start	Filters change requests according to their actual execution start time.
Created	Filters change requests according to the time at which they were created.
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.
Last update	Filters change requests according to the time at which they were last updated.
Planned end	Filters change requests according to their planned execution end time.
Planned start	Filters change requests according to their planned execution start time.
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.
Requested end date	Filters change requests according to the date by which the implementation of the change request must be completed.
Scheduled downtime end	Filters change requests according to when their downtime is scheduled to end.
Scheduled downtime start	Filters change requests according to when their downtime is scheduled to start.

The following elements are included when you create a filter for action items (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Due date	Filters actions items according to the date by which they must be completed.
Modified	Filters actions items according to the time at which they were modified.

Review Tab

Description	Filters requests according to review-related criteria. **To access**: Click the **Review** tab in the Activity Filter/ Change Request Filter/Action Item Filter dialog box.
Important Information	This tab is only available in Analysis mode.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	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.
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.
Outcome	Filters change requests according to the outcomes they have been assigned by change reviewers. You can select one or more of the listed outcomes.

GUI Element (A-Z)	Description
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.
Reviewed	Filters change requests according to the time at which they were reviewed. You define the review time interval by choosing the desired option from the selection box drop-down 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**. **Note:** You select the time interval according to your machine's time zone, as indicated in the calendar box.

Union Filters Tab

Description	Enables you to select an existing filter whose criteria you want to combine with the filter you are currently defining. **Note:** You can select multiple filters using the CTRL key. **To access**: Click the **Union Filters** tab in the Activity Filter/Change Request Filter/Action Item Filter dialog box.
Important Information	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 existing HP Release Control filters. For an example, see "Create a Union Filter - Use-Case Scenario" on page 151. **Notes:** ➤ 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 chose 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.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Move the selected filters from the **Available Filters** list to the **Selected Filters** list. The selected filters are combined with the filter you are currently defining.
	Move the selected filters from the **Selected Filters** list to the **Available Filters** list. The selected filters are not combined with the filter you are currently defining.

GUI Element (A-Z)	Description
Available Filters	The existing filters.
Selected Filters	Select the filter whose results you want to combine with the current filter.

Filters Selection List

Description	Enables you to define a set of criteria by which to determine the activities to be displayed in the Activity Timeline pane in the Director module and in the Filters pane in the Analysis module. ➤ **To access in the Director module:** Select **Module** > **Director** and then, in the Activities Timeline pane, click the downward arrow to the right of the **Activities** box. ➤ **To access in the Analysis module:** Select **Module** > **Analysis**. and then, in the Change Requests/Action Items pane, click the downward arrow to the right of the **Change Requests** or **Action Items** box.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**New.** Define a new filter. Opens the Activity Filter/ Change Request Filter/Action Item Filter dialog box.
	**Edit.** Edit an existing filter. Opens the Activity Filter/ Change Request Filter/Action Item Filter dialog box.

GUI Element (A-Z)	Description
	**Organize.** Delete an existing filter. Opens the Available Filters dialog box. **Note:** 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.
	**Save as.** Copy any filter except the **Favorites** filter by saving it under a different name or with different access (private/public) properties. Opens the Save Filter dialog box. For example, if you are a user without administrative privileges 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. **Notes:** ➤ You cannot modify the properties of the automatically generated **Favorites** filter. ➤ Only an administrator can modify the properties of the public filters. ➤ 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.
	Denotes a filter.
	Denotes a union filter. For details, see "Union Filters Tab" on page 167.
My Filters folder	Displays the filters that are saved to the **My Filters** folder. These filters are not viewed by any other user. For details, see the Save Filter dialog box.

GUI Element (A-Z)	Description
Public Filters folder	Displays the filters that are saved to the **Public Filters** folder by selecting the **Public Filters** option in the Save Filter dialog box. **Notes:** ➤ Filters that appear under the **Public Filters** folder can be viewed by all users. ➤ If you have not been assigned the administrator role, the filter appears under the **My Filters** folder.
Time Period Filters	Displays the filters that are saved to the **TIme Period Filters** folder by selecting the **Time Period Filter** option in the Save Filter dialog box.

Save Filter Dialog Box

Description	Save your filter settings and display the filter results in the Action Items pane. **Note:** 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. **To access:** ➤ In the Activity Filter/Change Request Filter/Action Item Filter dialog box, click **Save**. or ➤ In the **Filters Selection** list, click **Save as**.
Important Information	Once you have saved the filter, it appears in one of the following categories in the **Filters Selection** list: ➤ **My Filters** ➤ **Public Filters** (if the **Public filter** check box was selected) ➤ **Time Period Filters** (if the **Time Period Filter** check box was selected)

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Description	Enter a description for the filter.
Name	Enter the name of the filter. **Note:** You cannot use a a question mark (?) or the ampersand character (&) in the filter name.
Public Filter	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 **Note:** If you are a regular user, the filter appears under **My Filters** in the filter selection list. If you are an administrator and selected the **Public filter** check box, the filter appears under **Public Filters** in the filter selection list.
Time Period Filter	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 then appears 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, see "Configuring Time Period Settings" in the *HP Release Control Configuration Guide*. **Note:** The Time period filter check box cannot be selected in the following cases: ➤ If the **Time Period Conflicts** 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

Part IV

Monitoring and Implementing Activities

6

Director Module

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

This chapter includes:

Concepts

Tasks

Reference

Director Module Overview

The Director module enables you to 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.

For an example of how to monitor the implementation progress of an activity and how to handle the problems that may arise during the implementation, see "Monitor the Implementation Progress of an Activity" on page 179.

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. For details, see "Activity Timeline Pane" on page 187.

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 details, see "Representation of Activities on the Timeline" on page 177 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 details, see "Modifying the Time Display of the Timeline" on page 178 below.

You can filter the activities to view only those with certain criteria. For details, see "Filtering Change Requests, Activities, and Action Items" on page 147.

This section also includes:

➤ "Representation of Activities on the Timeline" on page 177

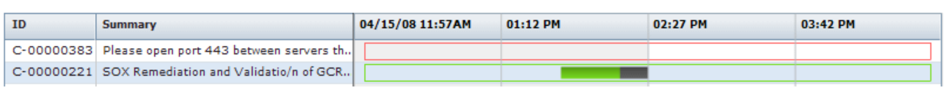
➤ "Modifying the Time Display of the Timeline" on page 178

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.



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 178.
- 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. For details, see "Activity Timeline Pane" on page 187.

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. For details, see "Alerts Pane" on page 190.

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 Change Advisory Board (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

User Communication

You can communicate with other users to convey or obtain information regarding the common activities with which you are associated, or regarding other topics through the Communications pane. For details, see "Communications Pane" on page 215.

Monitor the Implementation Progress of an Activity

This task describes how to monitor the implementation progress of an activity and how to handle the problems that may arise during the implementation.

This task includes the following steps:

- "Check the Activity for Alerts" on page 179
- "Understand Why an Activity is Delayed" on page 180
- "Reschedule an Activity to Avoid Collisions" on page 180

1 Check the Activity for Alerts

John Smith is the NOC Change Manager for ABC Software Company. He is responsible for monitoring the implementation progress for the deployment of a new webmail server.

In the Activity Timeline pane, John selects the activity on which he is working. In the Alerts pane, there is an alert notifying him that the activity has started late. As a result, the activity is scheduled to collide with another activity without the approval of the CAB. For details on the Alerts pane, see "Alerts Pane" on page 190.

2 Understand Why an Activity is Delayed

John wants to understand why the activity is not starting on time. So he communicates with the implementor in charge of the activity by opening a chat room in the Communications pane to obtain information regarding the reasons for the delay. For details about the Communications pane, see see "User Communication" on page 213.

3 Reschedule an Activity to Avoid Collisions

To avoid a collision with another activity, John decides to reschedule an activity to end earlier than the original CAB planned schedule. He clicks **Reschedule Activity** in the Activity Timeline pane to open the Reschedule Activity dialog box. For details, see "Reschedule Activity Dialog Box" on page 196.

Director Module User Interface

This section describes (in alphabetical order):

- Reschedule Activity Dialog Box on page 196
- Update Activity Status Dialog Box on page 197

Activity Information Dialog Box

Description	Enables you to view information about each activity. 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 access in Director Module:** Select the required activity in either the Activity Timeline pane or the Alerts pane, and click **Activity Information**. ➤ **To access in Implementor Module:** Select **Module** > **Implementor**. Select the required activity in the To-Do List pane, and click **Activity Information**.
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179
Useful Links	➤ "Review Tab" on page 165 ➤ "Alerts Pane" on page 190

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
View in Analysis	View the activity in the Analysis module.

Details Tab

Description	Displays details about the selected activity. **To access**: Click the **Details** tab in the Activity Information dialog box.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	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.

GUI Element (A-Z)	Description
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.

Implementation Guidelines Tab

Description	Displays CAB-assigned guidelines to follow before and/or after implementing the activity. **To access**: Click the **Implementation Guidelines** tab in the Activity Information dialog box.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Post-Implementation	Displays CAB-assigned guidelines to follow after implementing the activity.
Pre-Implementation	Displays CAB-assigned guidelines to follow before implementing the activity.

Event Log Tab

Description	Displays all events related to the selected activity.
	These events can be either user- or system-induced.
	➤ 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
	To access, use one of the following ways:
	➤ **In Analysis module:** In the **Assess** tab in the lower pane, click the **Review** tab and then click the **Event Log** tab.
	➤ **In Director module:** Click **Activity Information** either in the Activity Timeline pane or the Alerts pane to open the Activity Information dialog box. Then click the **Event Log** tab.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Context	The source of the event.
Description	A description of the event.

GUI Element (A-Z)	Description
Time	The time that the event was written to the Event Log.
User	➤ System-induced events are listed under the user name, **System**. ➤ User-induced events display the name of the relevant user.

CI KPIs Tab

Description	Displays KPIs (Key Performance Indicators) for the CIs impacted by the selected activity. The Impact CIs pane has the following panes: ➤ "Impact CIs Pane" on page 185 ➤ "Key Performance Indicators Pane" on page 186 **To access:** ➤ Select an activity in the Activity Timeline pane and click **KPIs for Activity CIs**. or ➤ Select an activity in the Activity Timeline pane, click **Activity Information**, and select the **CI KPIs** tab.
Important Information	➤ This feature is only available if HP Release Control is integrated with HP Business Availability Center 8.x. ➤ To view the CI KPIs, HP Business Availability Center needs to be running.
Useful Links	➤ For information about configuring this feature, refer to the chapter about configuring KPI viewing in the *HP Release Control Configuration Guide*. ➤ To submit information or comments about an activity, see "Notes for Activity <ID> Dialog Box" on page 196. ➤ To view additional layers of information on the timeline, see "Activity Timeline Pane" on page 187.

Impact CIs Pane

Description	Displays the business and system CIs that are affected by the change request.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	HP Release Control automatically refreshes the list of impact CIs every minute. Click **Refresh Activity Timeline** any time to refresh the display.
	Displays the attributes of the selected CI. Opens the CI Attributes dialog box.
<List of impact CIs>	The list of business and system CIs that are affected by the change request. When you select one of the CIs in the Impact CIs pane, the KPI details are displayed in the Key Performance Indicators pane. For a detailed description of the icons in this pane, see "Assess > Impact Tab" on page 67.

Key Performance Indicators Pane

Description	Displays the details of the KPIs associated with the CI you select in the Impact CIs pane.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

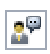
GUI Element (A-Z)	Description
Name	The KPI type.
Source	The application that provides the KPI information.
Status	The status of the KPI.
Value	If no status is available, the value of the KPI is displayed. The unit of the value is displayed in parenthesis.

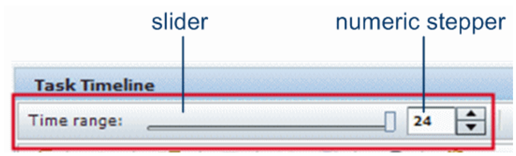
Activity Timeline Pane

Description	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. **To access**: Select **Module** > **Director** > **Activity Timeline** pane.
Useful Links	"Viewing Activities on the Timeline" on page 176

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**View Layer.** Enables you to view additional information by adding layers of information to the timeline. Select the layer of information you want to display. For information on the available layers of information you can view, see "Information Layers in the Activity Timeline Pane" on page 189.
 	**Drag mode/Cursor mode.** Enables you to modify the amount of past and future time you want displayed in the timeline area. You can toggle between **Drag Mode** and **Cursor Mode**. ➤ Click **Drag Mode** to turn the cursor into a hand when you hold it over the timeline area. 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. ➤ Click **Cursor Mode** to revert back to the regular cursor.

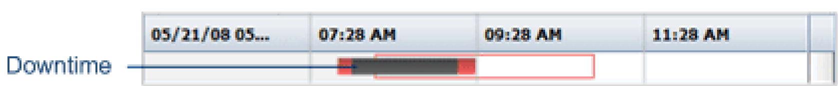
GUI Element (A-Z)	Description
	**Activity Information.** Opens the Activity Information dialog box. Contains details about the selected activity. **Note:** The **Activity Information** button is also available in the Alerts pane.
	**Update Activity Status.** Opens the Update Activity Status dialog box. Enables you to update the status on the implementor's behalf if the implementor is unable to update the activity status directly.
	**Reschedule Activity.** Opens the Reschedule Activity dialog box. Enables you to reschedule an activity to start or end earlier or later than the original CAB planned schedule.
	**Submit Note to Event Log.** Opens the Notes for Activity <ID> dialog box. Enables you to submit information or comments about an activity to the Event Log.
	**Open Activity Chat Room.** Open a chat room in the Communications pane. For details, see "User Communication" on page 213.
	**Refresh Activity Timeline.** HP Release Control automatically refreshes the Activity Timeline pane every minute. At any time, you can click **Refresh Activity Timeline** to refresh the display.
Activities	Define a set of criteria by which to determine the activities to be displayed in the Activity Timeline pane. For details, see "Filters Selection List" on page 168.
ID	The reference ID number of the activity in the service desk application.
Results	The number of activities that are displayed in the Activity Timeline pane.

GUI Element (A-Z)	Description
Summary	A description of the activity.
Time Range	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 1 and 24 hours. By default, a 24-hour time range is displayed.

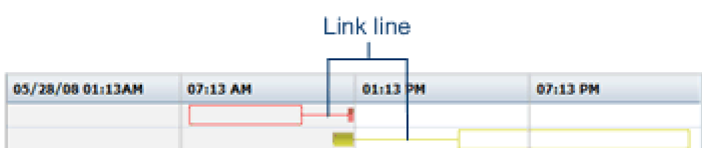
Information Layers in the Activity Timeline Pane

You can view the available layers of information in the timeline—one at a time, or simultaneously.

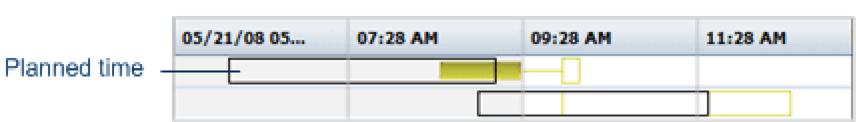
➤ **Downtime.** Intervals of downtime on CIs during activity implementation. Downtime is represented by a solid, dark gray bar.



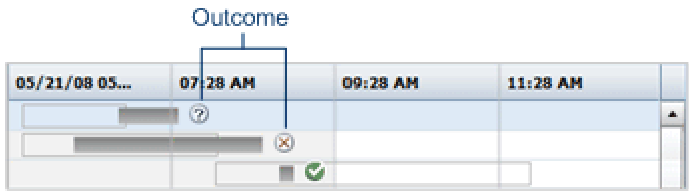
➤ **Link Line**. When an activity's planned and actual implementation schedules do not overlap, a thin line links the two schedules.



➤ **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.

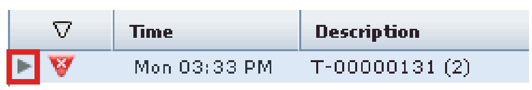
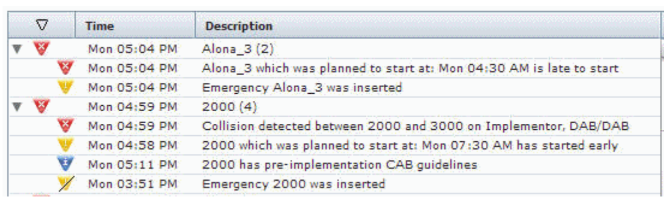


  - **Successful** . Denotes that the implementation is successful.
  - **Successful with problems** . Denotes that the implementation is successful but you encountered some problems.
  - **Failed** . Denotes that the implementation failed.
  - **Cancelled** . Denotes that the implementation is cancelled.

Alerts Pane

Description	Displays notifications about problems relating to the activities. Alerts also indicate warnings, or can simply be informative. **To access**: Select **Module** > **Director** > **Alerts** pane.
Useful Links	"Activity Alerts" on page 178

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Show Open Alerts Only.** Displays only the open alerts. This view hides dismissed alerts and alerts in reminder mode. **Note:** This is the default view.
	**Synchronize with Selected Activity.** Displays only the alerts associated with a selected activity. **Note:** To view only the open alerts for the activity, click  **Show Open Alerts Only**.
	**Group by Activity.** Enables you to group alerts in the Alerts pane by activity. The alerts are grouped by activity, indicated by a bullet adjacent to the alert's icon.  Click the bullet to expand the activity's alerts.  **Note:** To view only the open alerts for the activity, click  **Show Open Alerts Only**.
	**Activity Information.** Contains details about the selected activity. Opens the Activity Information dialog box. **Note:** The **Activity Information** button is also available in the Activity Timeline pane.
	**Handle Alert.** Enables you to determine how to handle an alert when an alert is generated. Opens the Handle Alert dialog box.

GUI Element (A-Z)	Description
	Open Activity Chat Room. Open a chat room in the Communications pane. For details, see "User Communication" on page 213.
	Indicates the alert's severity. The color of the alert icon is determined by the activity's most severe alert. 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** . The alert is active. ➤ **Dismissed** . The alert was acknowledged and removed from the Alerts pane. ➤ **In reminder mode** . The alert is in reminder mode.
Description	The ID of the activity. The number in parentheses next to the activity ID indicates the number of alerts for the activity.
Time	The time at which the alert was generated.

CI Attributes Dialog Box

Description	Displays the attributes of the selected CI. **To access in Analysis Module:** **1** In the **Assess** tab in the lower pane, click the **Impact** tab. **2** Click **CI Attributes** in the Impact CIs pane. **To access in Director Module:** **1** Click **Activity Information** either in the Activity Timeline pane or the Alerts pane to open the Activity Information dialog box. **2** Click the **CI KPIs** tab **3** Click **CI Attributes** in the Impact CIs pane.
Important Information	To customize the attributes that are displayed, see "Configuring CI Attribute Displays" in *HP Release Control Configuration Guide*.

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Name	The name of the attribute.
Value	The attribute's value.

Communications Pane

Description	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 details, see "User Communication" on page 213. **To access**: Select **Module** > **Director** > **Communications** pane.
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179

Director Module Window

Description	Enables you to monitor the status of change requests scheduled for implementation. This window contains the following panes: ➤ "Activity Timeline Pane" on page 187 ➤ "Alerts Pane" on page 190 ➤ "Communications Pane" on page 194 **To access**: Select **Module** > **Director.**
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179
Useful Links	"Director Module Overview" on page 176

Handle Alerts Dialog Box

Description	Enables you to determine how to handle an alert. 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 access:** In the Alerts pane, select the required alert and then click Handle **Handle Alert**.
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179
Useful Links	"Activity Alerts" on page 178

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Dismiss alert and reopen only if an alert's severity increases	Enables you to dismiss the alert. If the severity of this alert increases, the alert reopens 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).
Notes	(Optional) A free text box for any notes you want to associate with the alert.
Remind me again in:	Request an alert reminder. In the drop down list, select when to activate the reminder.
Reopen alert	Reopen a selected alert that has been dismissed. A regular alert icon appears next to the alert, indicating that it is open. **Note:** To reopen an alert, ensure that **Show Open Alerts Only** is not selected.

Notes for Activity <ID> Dialog Box

Description	A free text box for any information or comments you want to submit about an activity to the Event Log. **To access:** Select the activity you have comments about and click **Submit Note to Event Log** in the Activity Timeline pane.
Useful Links	"Event Log Tab" on page 184

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Notes	Notes or information you want to submit about an activity to the Event Log.

Reschedule Activity Dialog Box

Description	Reschedule an activity to start or end earlier or later than the original CAB planned schedule. **To access:** Select the required activity in the timeline and click **Reschedule Activity** in the Activity Timeline pane.
Important Information	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.
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179
Useful Links	"Event Log Tab" on page 184

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Opens a calendar. Select a new time and date. **Note:** The updated schedule is displayed on the timeline, and the event is logged in the Event Log.
End time	Displays the new end time for the selected activity.
Start time	Displays the new start time for the selected activity.

Update Activity Status Dialog Box

Description	Update the status on the implementor's behalf if the implementor is unable to update the activity status directly. **To access**: Select the required activity in the timeline and click **Update Activity Status** in the Activity Timeline pane.
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Actual end	➤ Click to select the date and time (current or in the past) that the activity ended. ➤ Click to clear the current status. **Notes:** ➤ You must update **Actual start** before you can update **Actual end**. ➤ If you are fully integrated with HP Service Manager/ Center as your service desk, the **Actual end** field is automatically updated in the originating service desk when you update it in the Director module.
Actual start	➤ Click to select the date and time (current or in the past) that the activity started. ➤ Click to clear the current status. **Note:** If you are fully integrated with HP Service Manager/Center as your service desk, the **Actual start** field is automatically updated in the originating service desk when you update it in the Director module.
Downtime end	➤ Click to select the date and time (current or in the past) that the downtime ended. ➤ Click to clear the current status. **Note:** You must update **Downtime start** before you can update **Downtime end**.
Downtime start	➤ Click to select the date and time (current or in the past) that the downtime started. ➤ Click to clear the current status. **Notes:** ➤ You must update **Actual start** before you can update **Downtime start**. ➤ If you update **Downtime start**, you must first update **Downtime end** before you can update **Actual end**.

GUI Element (A-Z)	Description
Notes	(Optional) A free text box for any notes you want to add about the status update.
On behalf of	Select the implementor on whose behalf you want to update the activity status. You can choose the name of the implementor from the drop-down menu or by clicking **Select Implementor**  and selecting a name from the list that appears.
Outcome	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.

7

Implementor Module

This chapter includes:

Concepts

Tasks

Reference

Implementor Module Overview

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 on which you are working. In turn, the NOC users are notified of the current status of the activity. For details, see "To-Do List Pane" on page 209.

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. For details, see "User Communication" on page 213.

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. For information on how to update the status of the activity, see "To-Do List Pane" on page 209.

When implementation is complete, you can update the implementation outcome. For information on how to update the implementation outcome, see "Report Activity As Finished Dialog Box" on page 208.

Modify the Implementation Progress of an Activity - Use-Case Scenario

This task describes how to modify the implementation progress of an activity and how to handle the problems that may arise during the implementation.

This task includes the following steps:

- "View the Activity Information" on page 203
- "View Event Log Information" on page 203
- "Update the Status of the Activity" on page 203
- "Request NOC Assistance" on page 204
- "Communicate with Other Implementors" on page 204
- "Report the Start of Server Downtime" on page 205
- "Report the End of Server Downtime" on page 205
- "Report the Activity Outcome" on page 205

1 View the Activity Information

Gary Shore is an implementor for ABC Software Company. He is responsible for modifying the implementation progress for fixing the email notification problem in the HP Release Control server.

In the To-Do List, Gary selects the activity on which he is working. He clicks the **Activity Information** button to open the Activity Information dialog box. Gary then clicks the **Implementation Guidelines** tab to view the CAB-assigned guidelines to follow before and after implementing the activity.

Since fixing the email notification problem involves scheduling a period of downtime for the HP Release Control server, the pre-implementation guidelines require that he notify the relevant people when, and for how long, the server will be down.

The post-implementation guidelines require that he give notification when the relevant people have been informed of the pending downtime.

For details on the Implementation Guidelines tab, see "Implementation Guidelines Tab" on page 183.

2 View Event Log Information

To confirm that downtime of the HP Release Control server does not impact any other critical applications, Gary needs to review information related to the activity on which he is working.

He reviews the information in:

➤ **The Event Log.** He clicks the Event Log tab in the Activity Information dialog box. For details about Event Log information, see "Event Log Tab" on page 184.

➤ **The Analysis module.** In the Activity Information dialog box, he clicks the **View in Analysis** button in the Details tab. For details, see "Details Tab" on page 181.

3 Update the Status of the Activity

Before implementation begins, the activity status is **Not started**. After deciding that he can begin implementation, Gary updates the status of the the activity to **Report Activity as Started**.

In the To-Do list, he selects the activity on which he is working and clicks the **Report the Activity as Started** button. The status of the activity is updated to **Started**.

For more information about activity status, see "To-Do List Pane" on page 209.

4 Request NOC Assistance

While the email notification problem is being worked on, Gary notices another hardware failure in the server he is working on and begins to investigate. He submits a message to the NOC users requesting their assistance with this problem.

In the To-Do list, Gary selects the activity for which he needs assistance. He clicks the **Request NOC Assistance** button In the To-Do List toolbar to open the NOC Assistance Request dialog box. Gary enters his request for assistance and clicks **OK**. The request is sent to the Director module where it is displayed as an alert with high severity.

For more information, see "NOC Assistance Request Dialog Box" on page 207.

5 Communicate with Other Implementors

Gary is now ready to implement the planned server downtime, but he remembers that his colleague Lauren had been working on the server. So he opens an activity chat room to tell her that he needs to take the server down.

In the To-Do list, Gary selects the activity about which he wants to chat and then clicks the **Open Activity Chat Room** button in the To-Do List toolbar. A chat room window opens in the Communications pane. He types his message in the box adjacent to the **Send** button, and clicks **Send**.

For more information about using the activity chat room, see "User Communication" on page 213.

6 Report the Start of Server Downtime

Before Gary takes the server down, he needs to update the status of the activity. He selects the activity on which he is working and clicks the **Report Start of Downtime** button in the To-Do List toolbar.

7 Report the End of Server Downtime

When Gary is ready to restart the server, he selects the activity on which he is working and clicks the **End Start of Downtime** button in the To-Do List toolbar.

8 Report the Activity Outcome

After implementation of the activity has ended, Gary needs to update the activity's status and indicate its outcome. He selects the activity on which he is working and clicks the **Report Activity as finished** button in the To-Do List toolbar. The Report Activity as Finished dialog box opens, in which he selects the required activity outcome.

For information about activity outcome options, see "Report Activity As Finished Dialog Box" on page 208.

Implementor Module User Interface

This section describes (in alphabetical order):

- Communications Pane on page 206
- Implementor Window on page 206
- NOC Assistance Request Dialog Box on page 207
- Report Activity As Finished Dialog Box on page 208
- To-Do List Pane on page 209

Communications Pane

Description	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 details, see "Communications Pane" on page 215. **To access**: Select **Module** > **Implementor** > **Communications pane**.

Implementor Window

Description	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. You can view activity information and update the status of activities on which you are working. For information on how to update the status of the activity, see "To-Do List Pane" on page 209. When implementation is complete, you can update the implementation outcome. For details, see "Report Activity As Finished Dialog Box" on page 208. This window contains the following panes: ➤ "To-Do List Pane" on page 209 ➤ "Communications Pane" on page 206 **To access**: Select **Module** > **Implementor.**
Included in Tasks	"Modify the Implementation Progress of an Activity - Use-Case Scenario" on page 202
Useful Links	"Managing Activity Implementation" on page 202

The following elements are included (unlabeled GUI elements are shown in angle brackets):

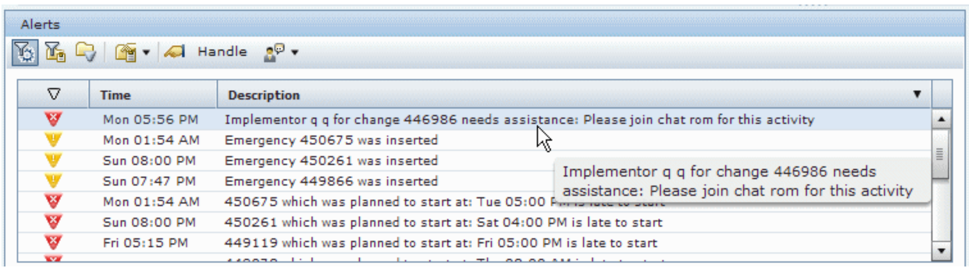
GUI Element (A-Z)	Description
Description	A full length description of the selected change.
Summary	A brief description of the selected change.

NOC Assistance Request Dialog Box

Description	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. For an example of a request that is displayed in the Directory module, see "Example of an Assistance Request" on page 208. For more information about the Director module, see "Director Module" on page 175. **To access:** Select the activity for which you need assistance and then click **Request NOC Assistance** on the To-Do List toolbar.
Included in Tasks	"Modify the Implementation Progress of an Activity - Use-Case Scenario" on page 202
Useful Links	"Managing Activity Implementation" on page 202

Example of an Assistance Request

This section displays an example of request is sent to the Director module where it is displayed as an alert with high severity.



Report Activity As Finished Dialog Box

Description	Enables you to select the required implementation outcome in the To-Do List after updating the activity status. For information on how to update the status of the activity, see "To-Do List Pane" on page 209. The status in the **Status** column changes to **Done**, and the **Outcome** column is updated with the relevant icon. For details on the icons that can appear in the Updated column, see "To-Do List Pane" on page 209. **To access**: Click **Report Activity as Finished** from the toolbar in the To-Do List.
Included in Tasks	"Modify the Implementation Progress of an Activity - Use-Case Scenario" on page 202
Useful Links	"Managing Activity Implementation" on page 202

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
Notes	(Optional) Enter your comments about the outcome of the activity.
Outcome	Select one of the following activity outcomes: ➤ **Successful** to indicate that the activity was successful. ➤ **Successful with Problems** to indicate that overall the activity was successful, but had some problems. ➤ **Failed** to indicate that the activity failed. ➤ **Cancelled** to indicate that the activity was cancelled.

To-Do List Pane

Description	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. **To access**: Select **Module** > **Implementor** > **To-Do List** pane.
Included in Tasks	"Modify the Implementation Progress of an Activity - Use-Case Scenario" on page 202
Useful Links	"Managing Activity Implementation" on page 202

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	**Activity Information.** Opens the Activity Information dialog box. Contains details about the selected activity. For details, see "Activity Information Dialog Box" on page 181.
	**Open Activity Chat Room.** Open a chat room in the Communications pane. For details, see "User Communication" on page 213.
	**Request NOC Assistance.** The NOC Assistance Request dialog box opens. As 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 the implementor is in need of assistance. For details, see "Activity Alerts" on page 178.
	**Report Activity as Started.** Updates the status of the activity to **Started**. **Note:** If you are fully integrated with HP Service Manager/ Center as your service desk, the **Report Activity as Started** field is automatically updated in the originating service desk when you update it in the Implementor module.
	**Report Activity as Finished.** Updates the status of the activity to **Finished**. Opens the Report Activity As Finished dialog box, prompting you for the implementation outcome. **Note:** If you are fully integrated with HP Service Manager/ Center as your service desk, the **Report Activity as Finished** field is automatically updated in the originating service desk when you update it in the Implementor module.
	**Report Start of Downtime.** Reports the start of activity downtime.

GUI Element (A-Z)	Description
	Report End of Downtime. Reports the end of activity downtime.
	Outcome. After you select the required outcome in the Report Activity As Finished dialog box, the outcome column is updated with one of the following icons: ➤ **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.
Activity ID	The reference ID number of the activity in the service desk application.
NOC Planned Start Time	The planned start time of the activity as rescheduled by the NOC users.
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, you select the activity you want to update using the appropriate buttons in the To-Do List toolbar. The status for the activity is updated as follows: ➤ **Not Started.** Before implementation begins, the activity status is **Not started**. ➤ **Started.** To update the activity's status to Started, click either **Report Activity as Started** or **Report End of Downtime** . ➤ **Down.** To update the activity's status to **Down**, click **Report Start of Downtime** . ➤ **Done.** Implementation of the change is complete.

8

User Communication

This chapter includes:

User Communication Overview

You can communicate with other users to convey or obtain information regarding the common activities with which you are associated, or regarding other topics by opening an activity chat room in the Communications pane. For details, see "Communications Pane" on page 215.

The Communications pane appears in both the Director and the Implementor modules.

➤ Director module users, such as NOC users, Release Managers, and Change Managers, communicate from the Director module. For details, see "Director Module" on page 175.

➤ Implementors communicate from the Implementor module. For details, see "Implementor Module" on page 201.

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.

Communications Pane User Interface

This section describes (in alphabetical order):

➤ Add New Room Dialog Box on page 214

➤ Communications Pane on page 215

➤ Manage Chat Rooms Dialog Box on page 218

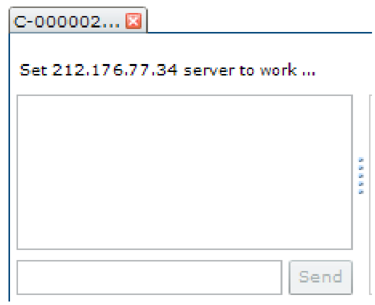
Add New Room Dialog Box

Description	Enter a name for the custom chat room. The chat room is added to the list of rooms, listing you as its owner. **To access:** Click **Add Chat Room** [+] in the Manage Chat Rooms dialog box.
Useful Links	"User Communication Overview" on page 213

Communications Pane

Description	Enables you to communicate with other users to convey or obtain information regarding the common activities with which you are associated, or regarding other topics. Opens an activity chat room window. **To access in Director module:** **1** In the Activity Timeline pane, select the activity about which you want chat. **2** On the Activity Timeline or Alerts pane toolbar, click **Open Activity Chat Room** . **To access in Implementor module:** **1** In the To-Do List pane, select the activity about which you want chat. **2** On the To-Do List toolbar, click **Open Activity Chat Room** .
Important Information	The Communications pane appears in both the Director and the Implementor modules.
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179
Useful Links	"User Communication Overview" on page 213

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Enables you to leave a chat room. **Note:** This button appears when you hold the cursor over the chat room tab, adjacent to the activity ID. 
	Opens the Manage Chat Rooms dialog box. Enables you to create custom chat rooms where you can hold discussions about general issues.
	Force NOC users to participate in the chat room. The next message you send opens a chat room window in the NOC users' Communications panes. **Note:** This button only appears in the Director module if the user is a NOC user.
	Users displayed in regular font are online but not in the chat room.
	Users displayed in bold font are in the chat room.
<Activity ID>	The name of the chat room window. The chat room window tab is named according to the ID of the activity in discussion.

GUI Element (A-Z)	Description

Send	Type a message in the box to the left of the **Send** button, and click **Send** to send it to the other users. The message you send appears in the message pane.
	➤ If you are a NOC user, all the users listed are automatically forced to participate in the chat session.
	    ➤ A chat room windows open in each user's Communications pane.
	    ➤ All users in the **User List** then appear in bold text, indicating that they are in the room.
	➤ If you are an implementor or other non-NOC users, 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 **Force NOC Intervention** 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.

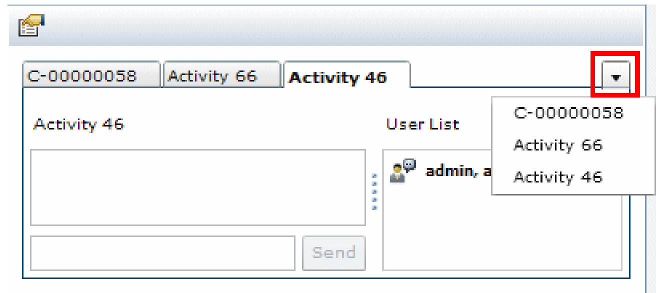
User List	Displays all the users associated with the activity in any way, who are online.

Manage Chat Rooms Dialog Box

Description	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. **To access:** Click **Manage Chat Rooms**  in the Communications pane.
Important Information	When you create a chat room, you are its owner. Anyone can join the chat room. Only you, the owner, can delete it.
Included in Tasks	"Monitor the Implementation Progress of an Activity" on page 179
Useful Links	➤ "Implementor Module" on page 201 ➤ "Director Module" on page 175 ➤ "User Communication Overview" on page 213

The following elements are included (unlabeled GUI elements are shown in angle brackets):

GUI Element (A-Z)	Description
	Create a custom chat room. Opens the Add New Room dialog box.
	Deletes the selected chat room. **Note:** You can only delete chat rooms that you created.
	Join the selected chat room. You can participate in many chat rooms at a time, enabling you to discuss different issues with relevant fellow users. A chat room window opens in your Communications pane. Other users in the chat room appear in the **User List**.

GUI Element (A-Z)	Description
	Displays the list of chat rooms in which you are participating. The drop-down arrow appears when you have joined two or more chat rooms. 
Owner	The name of the user who created the chat room.
Room name	Enter a name for the new chat room.

Part V

Dashboard

9

Working with the Dashboard

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

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 loads 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 are not 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:

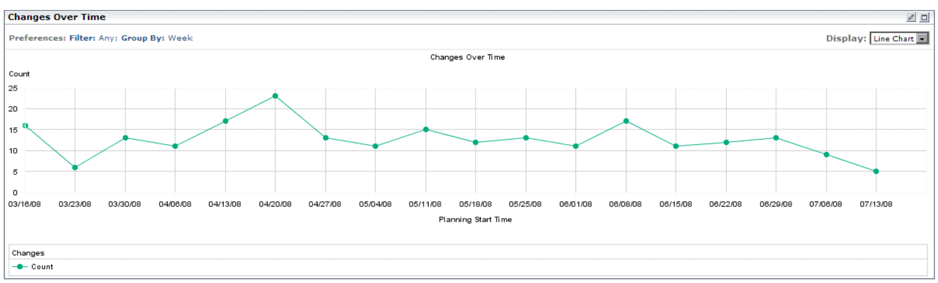
- Changes Over Time Portlet – for details, see page 225
- Abnormal Changes Over Time Portlet – for details, see page 226
- Latent Changes Over Time Portlet – for details, see page 226

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 226.

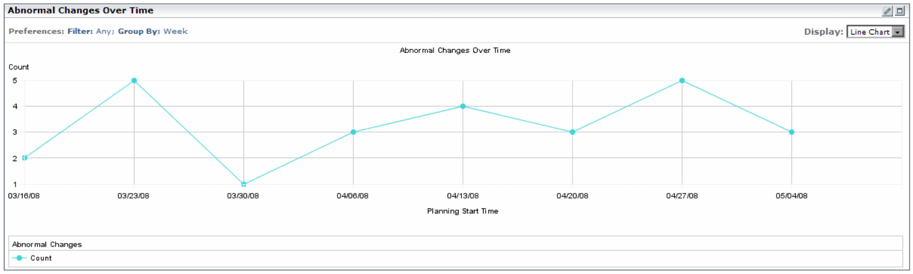
Changes Over Time Portlet

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



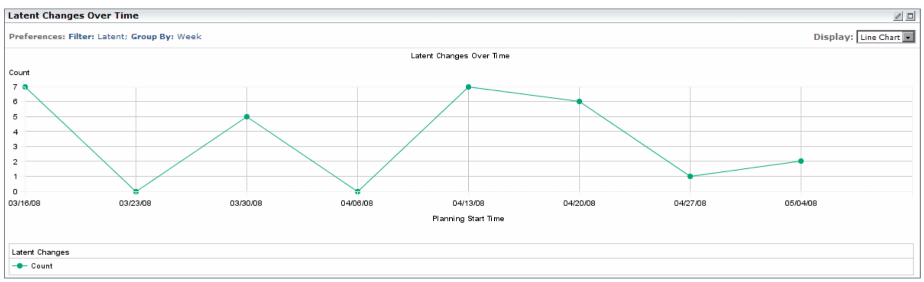
Abnormal Changes Over Time Portlet

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

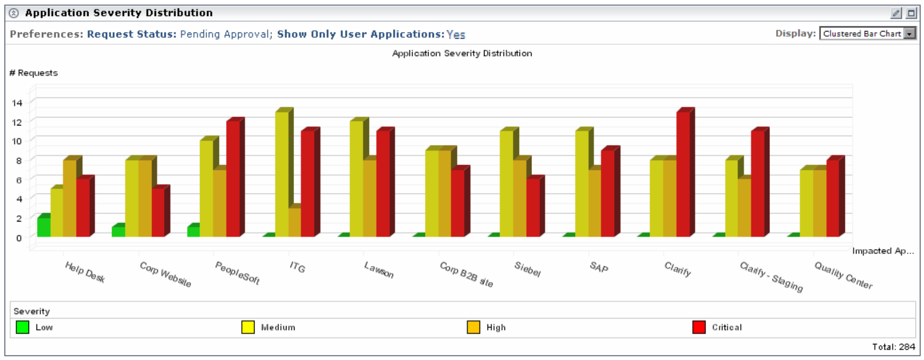
The default Analysis portlets display analysis information relating to change requests. The following portlets are displayed:

- Application Severity Distribution Portlet – for details, see page 228
- Application Status Distribution Portlet – for details, see page 229
- Change Request Impact Analysis Ratio Portlet – for details, see page 231

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:

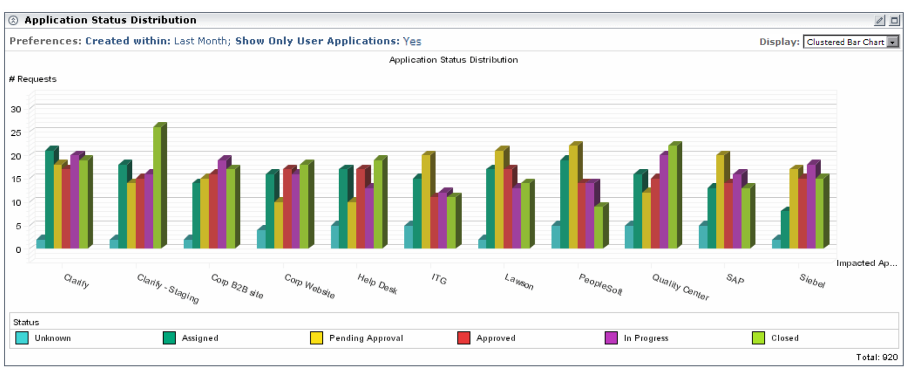
- **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Application Severity Distribution portlet.

- **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 "User Preferences Dialog Box" 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:

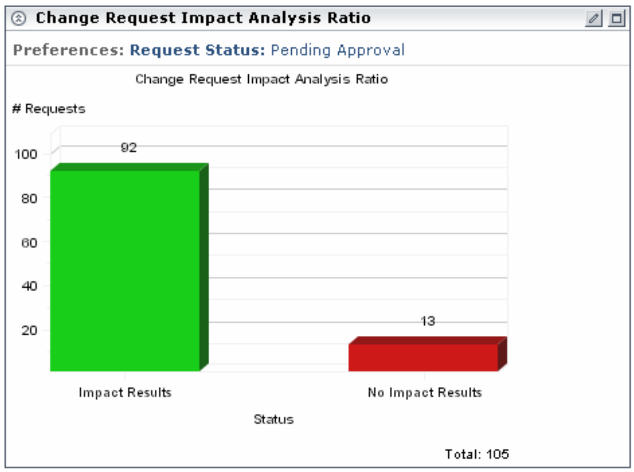
1. Click the **Edit** button. The Edit Preferences page opens, displaying the following options:

   - **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 "User Preferences Dialog Box" 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.

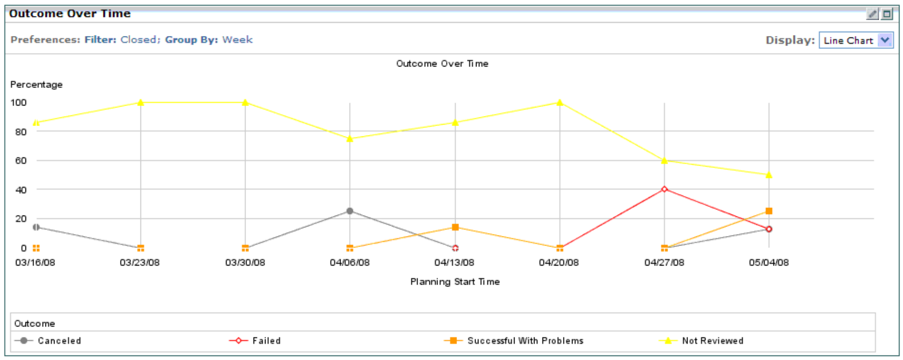
Post Implementation Portlets

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 233
- Outcome Grouped By Risk Portlet – for details, see page 234

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:

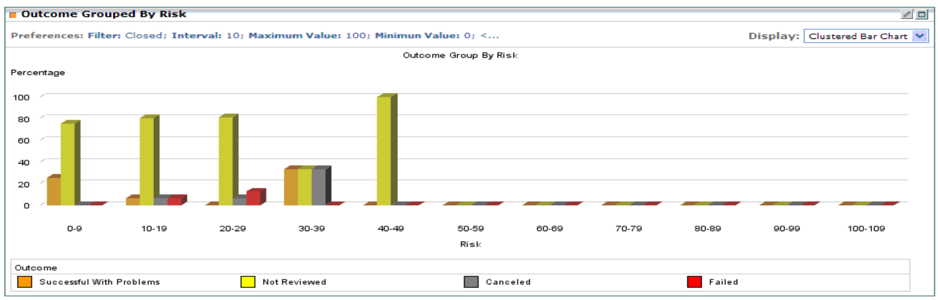
- **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Changes Over Time portlet.
- **Filter.** You can select which category of change requests to include in the portlet. The options that appear here are the same as the filter options in the Analysis module.
- **Group by.** You can choose to show movement in the percentage of the different change outcomes over daily, weekly, 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.

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:

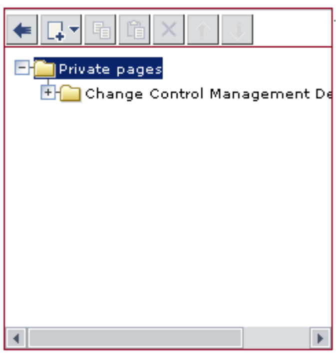
- "Adding Groups" below
- "Adding Pages" on page 237

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 240.

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

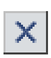
You can change the order of the Dashboard pages in the **Switch to page** list. You can also rename and remove pages, and modify the refresh rate of a page.

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 240.

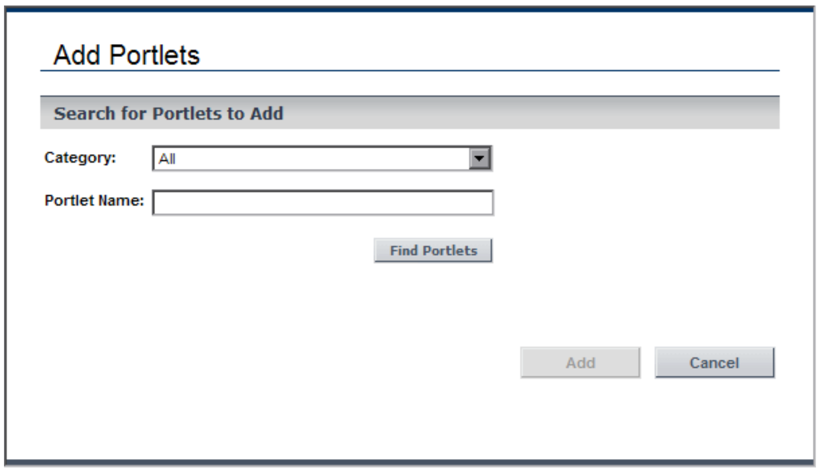
➤ To modify how portlets are displayed on a page, see "Managing Portlets" on page 241.

Adding Portlets

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

To add a portlet to a page:

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



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

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

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

   To rearrange the order in which the portlets are displayed, or to move or remove portlets from a page, see "Managing Portlets" on page 241.

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 242
- Removing Portlets from Pages – for details, see page 242

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

C

D

E

F

G

H

S

T

U

V