

Mercury™ IT Governance Center

Configuring a Release Management System

Version 5.5.0

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Chapter 1 Introduction

Mercury Release Management provides an interface for grouping and processing the Packages and Requests associated with a specific Release. Release Management introduces repeatable, reliable processes surrounding software and application releases. Groups of related Packages can then be activated from a single window.

Using Release Management, Release Managers can:

- Group related Packages and Requests in a single window
- Provide visibility into related Package statuses
- Set dependencies between Packages
- Define how a Release is distributed to different Environments

This consolidation of common Release Management activities provides a powerful tool for creating repeatable and reliable Releases.

Demand Management allows an organization to model its processes for managing technology initiatives from inception to implementation using a graphical workflow business modeler. Complex business rules can be modeled using approval methods and prioritization features that allow issues to efficiently advance through their specific workflow, routing them to relevant departments, groups or individuals. Demand Management is designed to capture data by prompting users for information specific to their “Request,” ensuring that required information is collected and validated at the appropriate time in the process.

About This Document

This guide provides instructions for configuring a [Release Management system](#). This includes requirements gathering, modeling your processes in a Workflow, defining commands used by the execution engine, and rolling out this system to your users. Each chapter covers a particular topic:

<i>Key Concepts</i>	Defines the key concepts and definitions used when creating a Release Management system.
<i>Modeling Your Release Process in Release Management</i>	Provides an overview of how to use Workflows to model your Release processes in Release Management.
<i>Creating a Release</i>	Explains how to create a Release and add Packages to it.
<i>Processing a Release</i>	Describes how to move a Release from creation to completion.
<i>Viewing Relevant Release Data</i>	Explains how to view only relevant Release data.
<i>Release Management Screens and Fields</i>	Defines the key screens and fields used in Release Management.

Intended Audience




The intended audience for this document include:

- Business or technical users who configure and maintain [a deployment system using Mercury Change Management](#)
- Managers responsible for reporting on software and application deployments
- Users responsible for deploying software and applications using Change Management
- [Release Managers](#)
- Release Managers

Document Conventions

Table 1-1 lists the types of conventions used in this document.

Table 1-1. Document conventions

Convention	Description	Example
Button, menu, tabs	Names of interface components that can be clicked (such as buttons, menus, and tabs) are shown in bold.	Apply button
Fields, Windows, Pages	Names of windows, fields, and pages are shown as displayed.	New Request window
Code	Code input and output are shown as displayed.	CachoConfigFile C:/ITG_Home/conf/resin.conf
<i>Link</i>	Linked URLs, filenames, and cross references are shown as blue italicized text.	www.mercury.com
<i>Variable</i>	Variables are shown as italicized text.	<i>ITG_Home</i> /bin directory
Note	Used to identify note boxes that contain additional information.	
Caution	Used to identify caution boxes that contain important information. Follow the instructions in all caution boxes, failure to do so may result in loss of data.	
Example	Used to identify example boxes that contain examples of related procedure.	

Additional Resources

Mercury Interactive provides the following additional resources to help you successfully configure the Mercury products:

- [Related Documentation](#)

- [Customer Support](#)
- [Education Services](#)

Related Documentation

The Library includes additional documents related to the topics discussed in this guide. Access the Library through the Mercury ITG Center online help.

<i>Using the Dashboard</i>	This document provides details for defining and configuring the Dashboard and custom Portlets.
<i>Processing Requests (Demand Management)</i>	This document explains how to process Requests using Demand Management.
<i>Processing Packages (Change Management)</i>	This document explains how to process Packages using Change Management.
<i>Using the Workbench</i>	This document explains how to navigate through the Workbench interface.
<i>System Administration Guide</i>	This document provides information necessary to implement, configure, and maintain Mercury ITG Servers.
<i>Migrators Guide and Reference</i>	This document provides details for configuring and using the Mercury ITG Migrator Object Types to migrate or archive data from Mercury ITG Center instances.
<i>Commands and Tokens Guide and Reference</i>	This document provides information on using commands and Tokens.
<i>Security Model Guide and Reference</i>	This document presents an overview of the data security model and provides instructions for controlling access to different entities.
<i>Configuring a Request Resolution System</i>	This document provides instructions for configuring a Request resolution system. This includes requirements gathering, modeling your processes in a Workflow, defining a Request Type to be integrated with the Workflow, and rolling out this system to your users.

<i>Configuring the Dashboard</i>	This document provides instructions for configuring custom Portlets, maintaining standard and custom Portlets, and setting a Default Dashboard for all users.
<i>Reports Guide and Reference</i>	This document provides details for running reports.
<i>Open Interface Guide and Reference</i>	This document provides details for integrating third-party products with Mercury ITG Center entities.
<i>Customizing the Standard Interface</i>	This document provides details for customizing the standard interface, including the directory structure and methods of customization for changing the presentation of the standard interface.

Customer Support

Customer support and downloads for the Mercury ITG Center and additional product information can be accessed from the Mercury Interactive Support Web site at <http://support.mercuryinteractive.com>.

Education Services

Mercury Interactive provides a complete training curriculum to help you achieve optimal results using the Mercury IT Governance Center. For more information, visit the Education Services Web site at <http://www.merc-training.com/main/ITG>.

Chapter 2 Key Concepts

The following Release Management concepts and definitions will help you create and deliver a successful software or application Release:

- *“Release”* on page 7
- *“Distribution”* on page 8
- *“Release Manager”* on page 9
- *“Security and Access Grants in Release Management”* on page 9
- *“Role of Workflows in Release Management”* on page 10
- *“Dependencies and Run Groups”* on page 14
- *“Open Release”* on page 15
- *“Submit Release”* on page 16
- *“Using Release Management - Process Overview”* on page 16

Release

A Release is a group of Packages (and related Requests) that need to be deployed together. Release Management provides an interface through which users can group, view and execute these Packages. Packages can be added to a Release either by a Ready for Release Step in the Package Workflow or by the Release Manager through the Release window.



Example

A software company has a product update release scheduled five months from now. In order to ensure a smooth product delivery, they decide to track all changes to their original code using Release Management. As developers complete their Packages, those Packages are included in a Release and processed together. By grouping every required change in the Release, the company is able to quickly and easily assess the state of the product delivery.

Distribution

A Distribution is a deployment of a Release. In a Distribution, the Release Manager specifies which Workflow will control the Release process and which of the Release's Packages will be included. See "[Role of Workflows in Release Management](#)" on page 10 for more information.



Example

A software company has a product update release scheduled five months from now. As a part of their Release process, they need to update their Testing, Production, and Training instances of the product. The processes required for delivering the product to these different Environments differs in the following ways:

- Not all of the Packages in the Release need to be applied to each instance (the Training instance requires custom code to establish additional product security which is not required in the Production instance).
- There is a different review process for each instance (the Testing instance does not require the department head sign-off for each iteration of the Release).

The software company creates a Distribution for each of these Release instances. For each Distribution they define:

- Which Packages are included in the specific Release instance.
- Which process (Workflow) the Release follows.

Release Manager

The Release Manager is the person who is responsible for overseeing and executing the delivery of an application or software Release. The Release Manager is specified in the Release Manager field on the Release window in the Workbench.

This user can add Packages and Requests to the Release, set dependencies, and create and process Release Distributions. The Release Manager is also typically involved in the configuration of relevant Workflows; in particular, they manage the Release Distribution Workflows.

Security and Access Grants in Release Management

Release Management has defined the following Access Grants that can be used to view, manage, and edit Releases.

Table 2-1. Release Management Access Grants

Access Grant	Description
Change Management: View Releases	Users with this Access Grant can view any Release in Release Management. They can also act on any Distribution Workflow Steps where they are included in the Step's security.
Change Management: Edit Releases	Users with this Access Grant can: <ul style="list-style-type: none"> • View any Release • Be designated as the Release Manager in the Release window • Create Releases • Edit or delete any Release that they created • Act on any Distribution Workflow Steps where they are included in the Step's security. • Edit or delete a Release that they did not create (only when they are designated as the Release Manager in the Release Management window).

Table 2-1. Release Management Access Grants

Access Grant	Description
Change Management: Manage Releases	Users with this Access Grant can: <ul style="list-style-type: none"> • Create a Release • Be designated as the Release Manager in the Release window • Edit or delete any Release (regardless of whether they are specified as the Release Manager in the Release Management window).

Role of Workflows in Release Management

Release Management Workflows are used in two key areas of a Release:

- Defining a process by which Packages are added to a Release using a Ready for Release Workflow Step
- Defining the Distribution process

The following sections discuss the applications of Workflows in a Release:

- *“Workflow Scope”* on page 10
- *“Release Management and Package Workflows”* on page 11
- *“Release Distribution Workflows”* on page 12
- *“Package Level Subworkflows”* on page 13

Refer to the Workflow chapter in *Configuring a Deployment System (Change Management)* for details on Workflow configuration.

Workflow Scope

Each Workflow has an associated Workflow Scope. The Workflow Scope determines which Release Management entities can be processed through that Workflow. The Workflow Scope can be one of the following:

- **Packages**
- **Requests**
- **Release Distributions**

Release Management uses Workflows with “Packages” and “Release Distribution” scopes.



Note

Certain Workflow configuration restrictions are enforced by the Workflow Scope. For example, Release Distribution Workflows can not include the **wf_jump** and **wf_receive** Workflow Events. For more information on configuring Distribution Workflows, see “*Modeling Your Release Process in Release Management*” on page 19.

Release Management and Package Workflows

You can configure your standard Package Workflows to feed Packages into a Release. A Ready for Release Workflow Step can be included in the Package Workflow. When a Package Line enters the Ready for Release Step, the developer (or other Release Management user responsible for that Package) can select which Release they would like to add the Package to. The user selects the Release and adds the Package and its associated Package Lines to the Release. When all of the Package Lines are confirmed in the Ready for Release Step, the Package is ready to be used in the Release.

Figure 2-1 illustrates the process by which developers can add Packages to a Release.

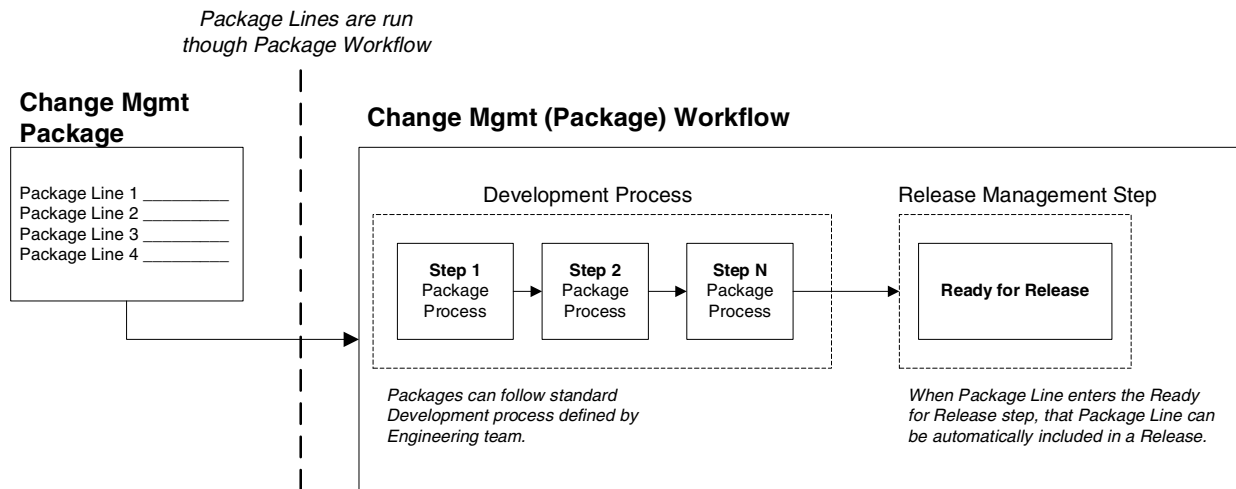


Figure 2-1 Ready for Release Step in Change Management Workflow

Release Distribution Workflows

Just as the inclusion of appropriate Packages and Requests is integral to the Release definition, so is the process by which the Packages are processed in a Release Distribution. Distribution Workflows are used to define the process by which the Release's Packages are properly tested, approved, and executed against any required Environments.

Release Distribution Workflows need to include Package Level Subworkflows to perform key Package level processing. All Package Line (Object Type) execution will occur in the Subworkflow.

Figure 2-2 illustrates the relationships between basic Change Management Packages and Release Workflows.

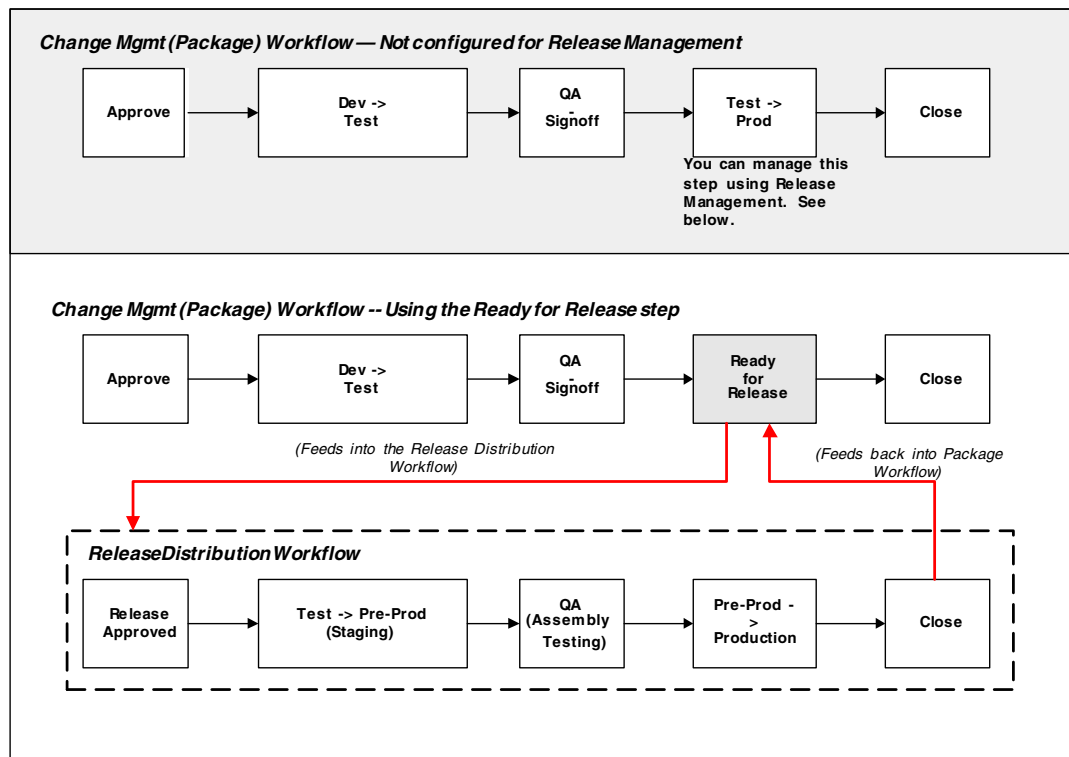
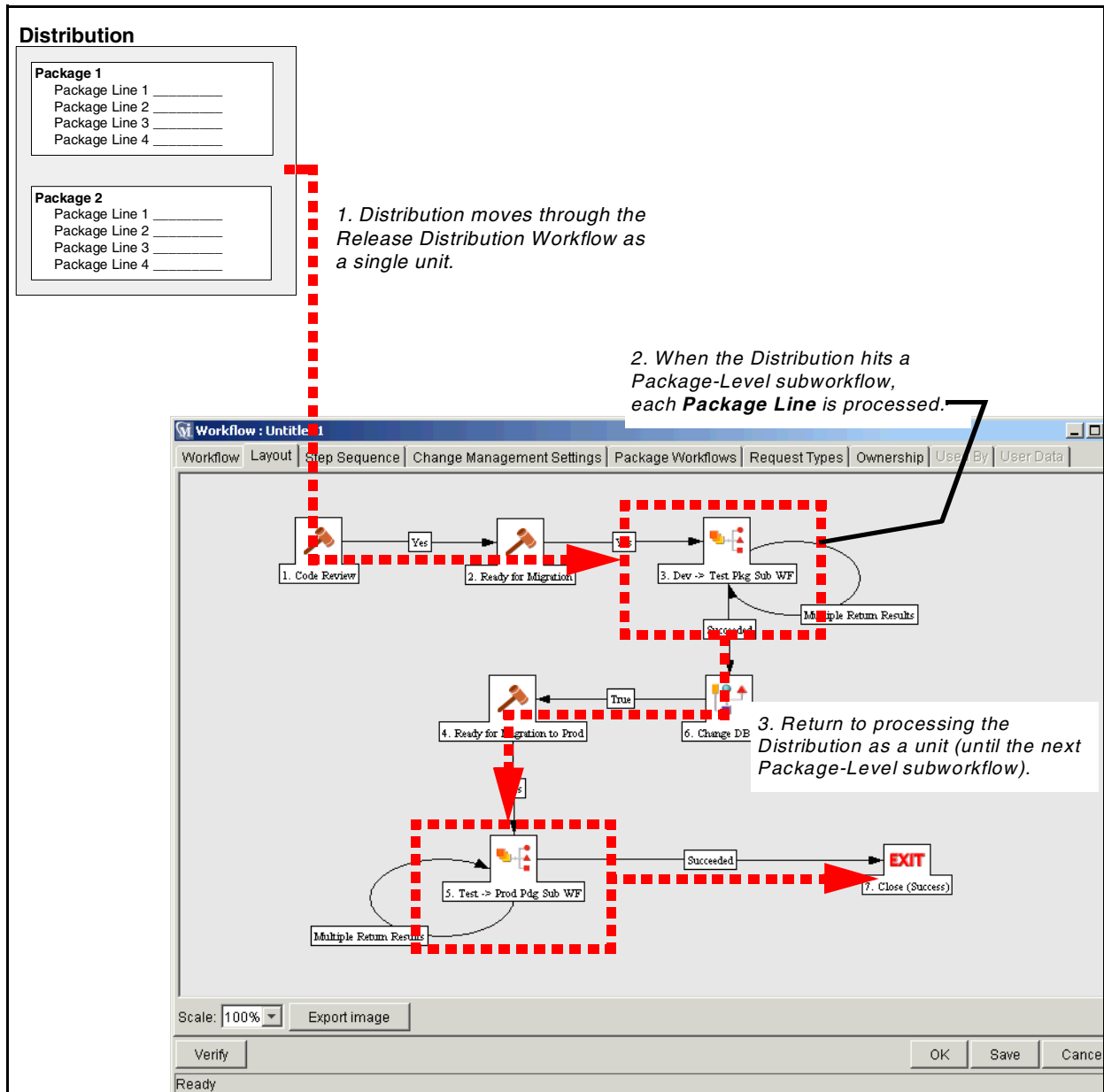


Figure 2-2 Role of the Distribution Workflow

The Release Distribution Workflow provides a way in which the Release Manager can ensure that all files associated with the Release deploy properly. As with any Workflow, the Distribution Workflow can be configured to model your existing or best-practice Release processes.

Package Level Subworkflows

Release Distributions include Package Level Subworkflows, which are used to perform key Package level processing. Package Level Subworkflows are any Package Subworkflows that have the Use in Release Distributions flag set to **Yes**. All Package Line (Object Type) execution will occur in these Subworkflows. Also, all Package and Package Line Tokens will be resolved when traversing through these Workflows.



Package Level Subworkflows are used within Release Distribution Workflows. The Release Distribution Workflow is typically used for Release approvals and executing system commands (such as starting or stopping servers). The Distribution is processed as a single unit as it proceeds through the Release Distribution Workflow. When the Distribution hits a Package-Level subworkflow, each Package Line within the Distribution is processed. The Package Subworkflows are used to process Package Lines and execute Object Type commands.

Dependencies and Run Groups

Within a Release, the Release Manager can configure the order in which the Packages are processed. The Release Manager can select certain Packages to run before or after other Packages in the Release. The ordering of Packages segregates them into “Run Groups.” When a Distribution enters an Execution Step in a Package-Level Subworkflow, all Packages Line in the first Run Group will be executed before the Package Lines in the next Run Group can begin.

Run Groups are automatically determined as you set dependencies between Packages. Run Groups present an efficient way to process Packages which can be run in parallel without having to serially wait for non-related dependencies. [Figure 2-3](#) illustrates how Package Dependencies result in different Run Groups.



Note

Run Groups are automatically determined when a Release Distribution is created, based on Package dependencies specified in the Release.

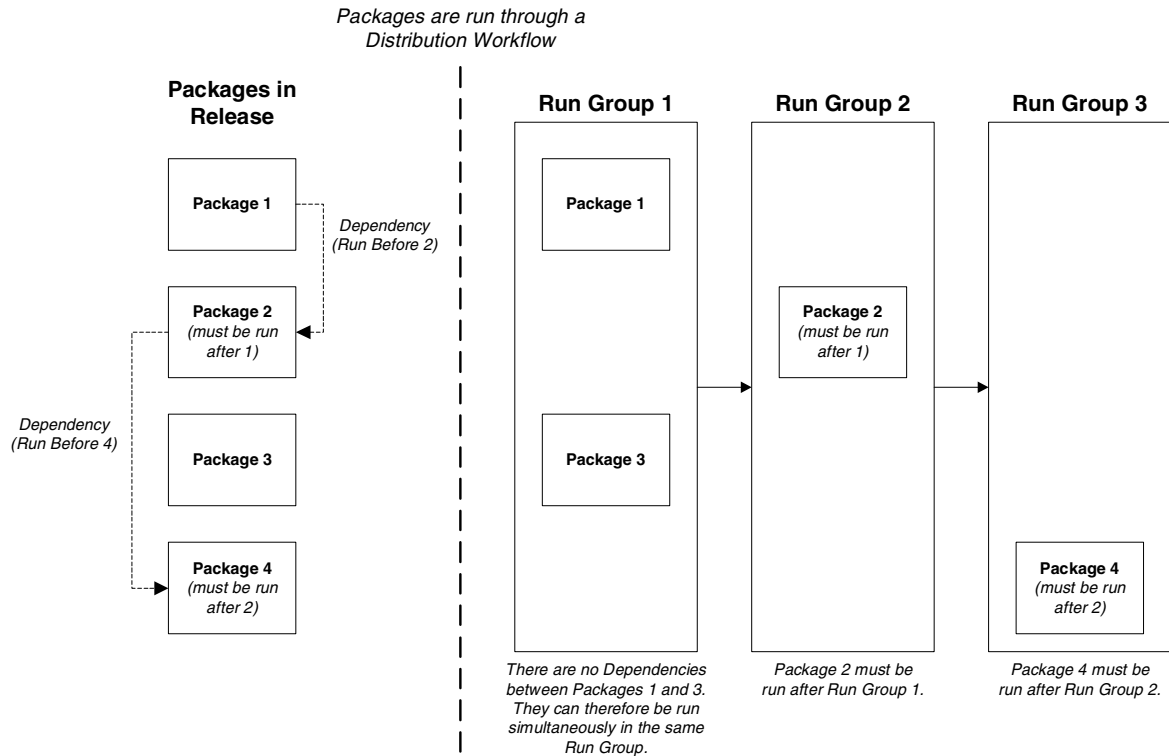


Figure 2-3 Dependencies and Run Groups

Open Release

When a Release Manager first creates a Release, only Release Management users with permission to edit the Release window can add Packages. The Release Manager can enable other users to add Packages to the Release by clicking the **Open Release** button on the Release window. By creating an Open Release, Developers processing a Ready for Release Step (in a Change Management Package Workflow) will have the option of adding the Package to that Release. If a Release is not opened, it will not appear in the list used for that Ready for Release Step.

Submit Release

When a Release Manager submits a Release, the Release enters a code freeze state. In this state, Packages cannot be added or removed from the Release by anyone other than the Release Manager. When the Release is submitted, a Distribution is automatically created. You can then process the Distribution or cancel it and create a new one later.

Using Release Management - Process Overview

Release Management introduces repeatable, reliable processes surrounding software and application releases. Release Management provides an interface for grouping and processing the Packages and Requests associated with a specific release.

The following sections provide an overview for creating a Release:

- [“Release Management Pre-Configuration”](#) on page 16
- [“Creating the Release”](#) on page 17
- [“Processing the Release”](#) on page 17

Release Management Pre-Configuration

Planning for an application or software Release should begin immediately upon recognition that a Release is pending. Before the Release Manager creates a Release, it is often necessary to pre-configure the following in Release Management:

1. Modify Package Workflows to include the Ready for Release Workflow Step
2. Create all required Distribution Workflows (including all Package-Level Subworkflows)

By adding the Ready for Release Step to Change Management (Package) Workflows, you provide developers with the ability to add a required Package to a Release at the appropriate time. Development Package Workflows will typically address necessary approval and Execution Steps directly related to that Package. The Ready for Release Step indicates that the developer has signed-off on the Package and the Package is ready to be integrated and shipped with other Packages related to the Release. See [“Configuring](#)

Packages to Feed into a Release” on page 23 for instructions on creating the Ready for Release Step.

The Release Manager should also create the Distribution Workflows. This includes defining any Subworkflows (Package level or Distribution level) that will be used in the Release Distribution Workflow. These Workflows define the process by which the Release’s Packages are properly tested, approved, and executed against any required Environments. The Release Distribution Workflow and associated subworkflows ensure that all files associated with the Release are properly deployed. As with any Workflow, the Distribution Workflow can be configured to model your existing or best-practice Release processes.

Creating the Release

To create a Release in Release Management:

1. Create a new Release in the Release window. (See *“Establishing a Release”* on page 31 for additional details.)
2. Open the Release by clicking the **Open Release** button. This allows developers working in the Change Management Package window to add Packages to the Release via the Ready for Release Step.
3. Add Packages and Requests to the Release. Packages can be added through the Ready for Release Step in the Packages window or directly by the Release Manager through the Release window.
4. Configure Dependencies between Packages in the Release. Click the **Dependencies** button on the **Package** tab to set Package dependencies.
5. Verify the Release. See *“Verifying the Release”* on page 41 for additional details.

Processing the Release

When the appropriate data is collected in the Release (Packages, Requests and Dependencies) and the appropriate Workflows have been created, the Release Manager can then process the Release.

To process a Release the Release Manager will:

1. Submit the Release.

- a. Create a Distribution. This consists of selecting a Workflow for the Distribution and disabling any Package Lines that you do not want run with that Distribution.
 - b. Submit the Distribution.
2. Send feedback to Packages. You can send feedback to the Packages at any time from the Distribution window. Select the value from the Feedback drop down list and click **Feedback -->**. This value is sent back to the Package Line in the Ready for Release Step and is used to transition out of that Step.
 3. Close the Release only if you do not need to create additional Distributions for use at a later date.



Note

- When the Release is closed, any in-progress Distributions are cancelled.
- If a Distribution has not been submitted, it will not be cancelled when the Release is closed. However, after the Release is closed the Distribution cannot be edited.

Chapter 3

Modeling Your Release Process in Release Management

You can model your Release processes using the Mercury ITG Center's Workflow engine. When creating your process, you should consider the full range of Release Management's functionality. The following sections provide a summary of the Workflows used to create a robust Release Management solution. They also provide detailed instructions on creating different Workflow-related parts of your solution.

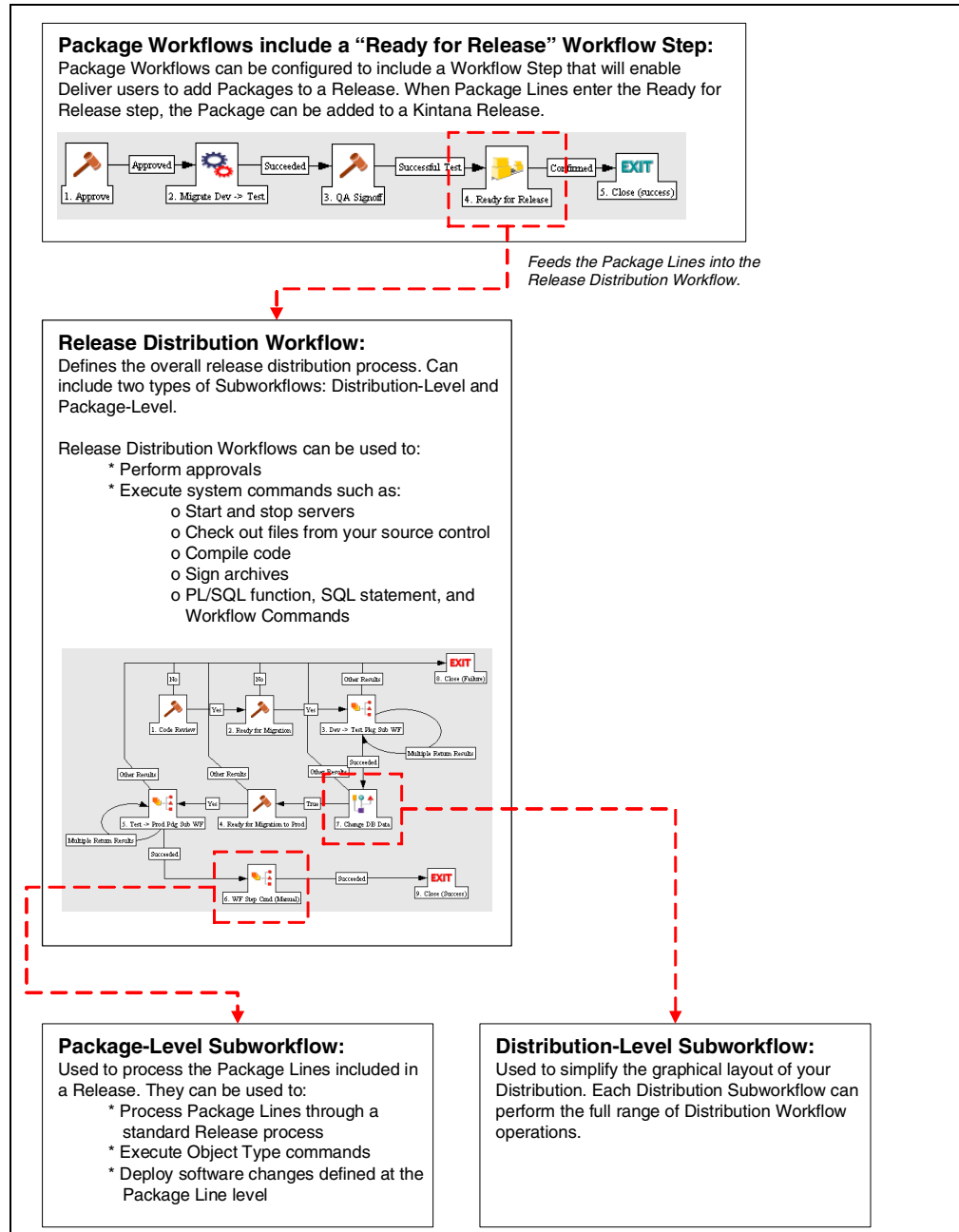
- *Release Management Workflow Overview and Restrictions*
- *Workflow Design Considerations*
- *Configuring Packages to Feed into a Release*
- *Defining a Release Distribution Workflow*
- *Defining Package-Level Subworkflows for Use in Release Distribution Workflows*
- *Adding Subworkflows to Distribution Workflows*

Release Management Workflow Overview and Restrictions

Before you begin to build your Release Distribution and Package Workflows, consider the following Workflow components that can be used to build the overall process.

- Package Workflows that feed into the Release Distribution Workflow at a Ready for Release Step
- Release Distribution Workflow
 - o Distribution-Level Subworkflow
 - o Package-Level Subworkflow

The following diagram illustrates the relationship between these items. This section details common processes executed in each type of Workflow. It also lists any restrictions related to each type of Workflow definition. For example, Release Distribution Workflows can not execute Object Type commands. Understanding these restrictions will help you to design a functional set of Release-related Workflows.



Workflow Design Considerations

The following sections list the restrictions related to each type of Workflow definition. Understanding these restrictions will help you design a functional set of Release-related Workflows.

Release Distribution Workflow Restrictions

Release Distribution Workflows can be used to perform standard approvals and execute system commands. Certain Workflow functions are not, however, available for Distribution Workflows. These restrictions can be divided as follows:

- *Workflow Step Source Restrictions*
- *Token Resolution*
- *Package Line Processing*

Workflow Step Source Restrictions

Release Distribution Workflows consist of the standard types of Workflow Step Sources: Decisions, Conditions, Executions, and Subworkflows. When creating a Release Distribution Workflow, the following restrictions apply:

- **Conditions:**
You can only use AND and OR Steps in Distribution Workflows.
- **Executions:**
The following Built-in Workflow Events are not allowed in Distribution Workflows:
 - o **wf_jump** and **wf_receive** -- you can not use the Jump / Receive functionality within a Distribution Workflow.
 - o **execute_object_type_commands** -- you can not execute Object Type Commands. This processing is permitted in the Package-Level Subworkflows.
 - o **rm_ready_for_release** -- you can not include a Ready for Release Step in the Distribution Workflow.

Token Resolution

Package and Package Line Tokens can not be resolved in Distribution Workflows. Package Token resolution occurs in the Package-Level

Subworkflows. So, as you add Notifications or Workflow executions to a Distribution Workflow, ensure that you are not using any Package or Package Line Tokens. If you need to resolve a Package or Package Line Token, you will need to do this in a Package-Level Subworkflow.

Package Line Processing

Release Distribution Workflows can not be used to process Package Lines. You must use a Package-Level Subworkflow to perform this level of processing. For example, you must use a Package-Level Subworkflow in your Distribution Workflow to execute Object Type commands.

Package-Level Subworkflow Restrictions

Package Subworkflows that are marked as Use in Release Distributions can be included in a Release Distribution Workflow. Package Subworkflows that will be used within the **Release Distribution** Workflow scope have the following restrictions.

- Package-Level Subworkflows must be used for all Package Line processing. Package Token resolutions and Object Type command executions can only be run as Package Lines are processed through a Package-Level Subworkflow.
- Condition Steps: The SYNC Condition Step will not have any affect on the Distribution
- Execution Steps:
 - o **wf_jump**, **wf_receive**, and **wf_ready_for_release** can not be included in the Subworkflow
 - o You can not include **Close** Steps in the Subworkflow

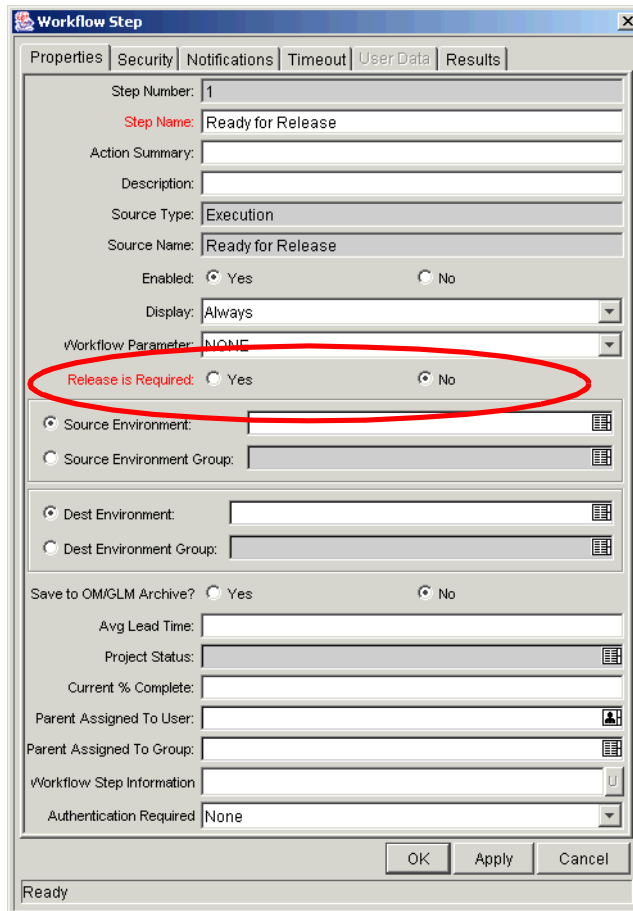
Configuring Packages to Feed into a Release

Package Workflows can be configured to include a Workflow Step that will enable users to add Packages to a Release from the Package window. When Package Lines enter the Ready for Release Step, the Package can be added to a Release.

You can add a Ready for Release Step to any Package Workflow or Subworkflow, except for Subworkflows that are designated for use in Release Distributions (**Use in Release Distribution** is selected in the Workflow window).

To add a Ready for Release Step to your Package Workflow:

1. Open the Package Workflow.
2. Drag the Ready for Release Step Source onto the Package Workflow's **Layout** tab. The Workflow Step window opens.



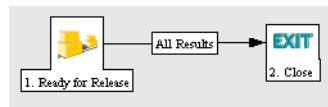
The screenshot shows the 'Workflow Step' configuration dialog box. The 'Step Name' is 'Ready for Release'. The 'Source Type' is 'Execution' and the 'Source Name' is 'Ready for Release'. The 'Enabled' radio button is set to 'Yes'. The 'Display' dropdown is set to 'Always'. The 'Workflow Parameter' dropdown is set to 'NONE'. The 'Release is Required' radio button is set to 'No', and this field is circled in red. Other fields include 'Source Environment', 'Dest Environment', 'Save to OM/GLM Archive?' (set to 'No'), 'Avg Lead Time', 'Project Status', 'Current % Complete', 'Parent Assigned To User', 'Parent Assigned To Group', 'Workflow Step Information', and 'Authentication Required' (set to 'None'). The dialog has 'OK', 'Apply', and 'Cancel' buttons at the bottom.

3. If you want to require that Package users specify a Release at this point in the process, select Release is Required = **Yes**. To leave this as a non-required field, select **No**.
4. Finish configuring the Workflow Step by entering other required and optional Workflow Step information, such as Security and Notifications.
5. Click **OK**.

6. In the **Layout** tab, add transitions to and from this Workflow Step.

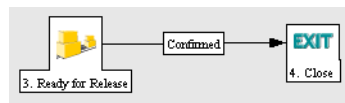
When Package Lines enter this Workflow Step, any user with permission to act on that Step can add the Package to a Release. You can then configure the Workflow to either proceed automatically or wait until the Release feeds a result back to the Package (see *“Completing the Distribution”* on page 50).

A Workflow Step that would automatically proceed to the next Step in the Package Workflow could be configured as follows:



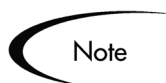
[Ready for Release] --> {transition = All Results} --> [Close]

A Workflow Step that would proceed to the next Step only after receiving feedback from the Release Distribution could be configured as follows:



[Ready for Release] -> {transition = Confirmed (or other Validation value)} -> [Close]

To make this transition meaningful, it must be coordinated with the Distribution. As a Release Distribution is processed, the Release Manager will decide when to feed a result back to the Packages in the Release. This value is sent from the Distribution window. Select the value from the Feedback drop down list and click **Feedback -->**. The Ready for Release Step will then continue processing based on the resulting feedback.



Note

The Ready for Release Step's transition values must match the values in the Feedback drop down list. This is set in the RM - Ready for Release Validation.

Defining a Release Distribution Workflow

The process for creating a Distribution mirrors the processes for creating Package and Request Workflows. A Release Distribution Workflow only differs with a few minor settings in the Workflow definition. There are also a few rules affecting which types of Workflow Steps can be included in the definition that will impact your design.

In addition to regular Workflow Steps, a Distribution Workflow can contain two different types of subworkflows:

- **Distribution-Level:**
These subworkflows act as continuations of the Distribution Workflow, processing the Distribution through a series of Decisions and executions.
- **Package-Level:**
These subworkflows are used to run every Package Line in the Distribution. All Package and Package line processing and execution happens here.

The following instructions highlight how to create the Distribution Workflow and the two types of Subworkflows.

To create a Release Distribution Workflow:

1. Click **New Workflow** in the Workflow Workbench.
2. Select **Release Distributions** from the Workflow Scope drop down list.
3. Add Workflow Steps to the **Layout** tab.
 - a. Select **Release Distributions** from the drop down list in the Workflow Step Sources window.
 - b. Add Workflow Steps by dragging them to the **Layout** tab. Certain Workflow Step sources can not be added to a Distribution Workflow. See *“Release Distribution Workflow Restrictions”* on page 22 for information on these restrictions.
 - c. Add any Subworkflows (Distribution-Level or Package-Level) to the **Layout** tab. See *“Adding Subworkflows to Distribution Workflows”* on page 29.
 - d. Add transitions between the Workflow Steps.
4. Save the Workflow.

Defining Package-Level Subworkflows for Use in Release Distribution Workflows

Package-Level Subworkflows can be created and included in your Distribution Workflow to perform all Package Line processing. The following abbreviated process highlights the required settings for defining this type of Workflow. To create a Package-Level Subworkflow:

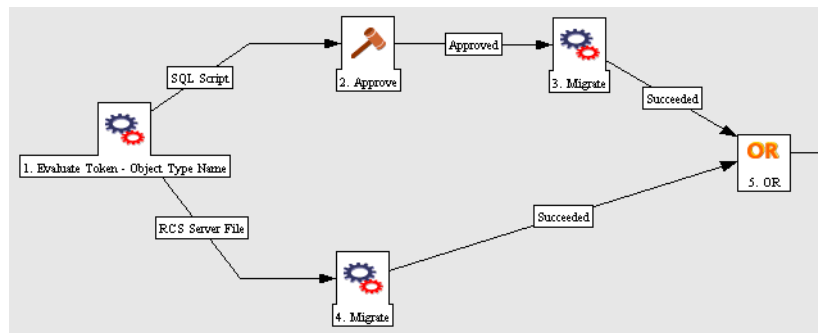
1. Click **New Workflow** in the Workflow Workbench.
2. Select **Packages** from the Workflow Scope drop down list.
3. Select Subworkflow = **Yes**.
4. Select Use in Release Distributions = **Yes**.
5. Add Workflow Steps to the **Layout** tab.
 - a. Select **Packages** from the drop down list in the Workflow Step Sources window.
 - b. Add Workflow Steps by dragging them to the **Layout** tab. Certain Workflow Step sources can not be added to a Package-level Subworkflow. See *“Package-Level Subworkflow Restrictions”* on page 23 for information on these restrictions.
 - c. Add transitions between the Workflow Steps.
6. Add a Return Execution Step to the **Layout** tab (Workflow Event = **wf_return**). For a Package Line to transition back to the parent Workflow, the Subworkflow must contain a Return Step. The transitions leading into the Return Step must match the Validation established for the Subworkflow Step. See the “Advanced Workflow Configuration” section in *Configuring a Deployment System (Change Management)*.
7. Save the Workflow.



You can also initiate the Package-level Subworkflow process from the Workflow Step Sources window.

Example: Branching in a Process Based on a Token

You can configure the Package-Level Subworkflow to “branch” its process based on whether a Package contains a SQL Script object (Object Type = **SQL Script**) or an RCS Server File (Object Type = **RCS Server File**). This means that the result of a Workflow Step will depend on the Object Type name.

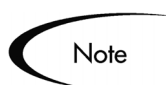


To configure a Workflow Step to branch based on the Object Type:

1. Create a Workflow Execution Step that will evaluate the Package Line Token for the Object Type. The Step should be configured with the following settings:
 - Execution Type = **Token**
 - Validation = **DLV - Object Type - Enabled**
 - Execution = **Token**

2. Add the Step to the Workflow and set the transitions out of the Step. Using the above set-up, you can select any enabled Object Type as a transition value.

When a Package Line enters the Evaluate Token - Object Type Name Step, the [PKGL.OBJECT_TYPE] Token will be resolved and the Package Line will be routed accordingly.



Note

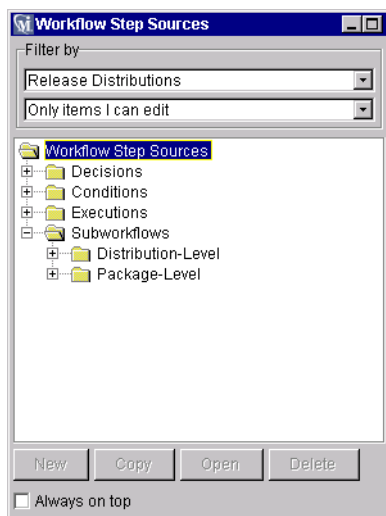
Branching based on a Package or Package Line Token must occur in the Package-Level Subworkflow. Package and Package Line Tokens are not resolved in Release Distribution Workflow Steps.

Adding Subworkflows to Distribution Workflows

Subworkflow Steps can be added to a Distribution Workflow using the standard Workflow creation processes. This section highlights the required

settings and process for adding a Subworkflow to a Release Distribution Workflow.

Subworkflows are added to a Workflow by dragging and dropping the Subworkflow from the Workflow Step Sources window. Subworkflows that are configured for use in Release Distributions appear in either the Distribution-Level or Package-Level directories shown below.



Chapter

4

Creating a Release

You can establish a new Release by clicking the **New** button on the Release Workbench. A new Release should be created as soon as it is known that the Release is needed. This allows for the addition of Packages or Requests at any point during the Release Cycle.

The following sections provide instructions for engineering your Release:

- [“Establishing a Release”](#) on page 31
- [“Adding a Package”](#) on page 33
- [“Adding a Request”](#) on page 38
- [“Verifying the Release”](#) on page 41
- [“Copying an Existing Release”](#) on page 42

Establishing a Release

Setting up a successful software or application Release requires a comprehensive view of the Release process. Release Management provides the tools for capturing the entire Release process. See [“Using Release Management - Process Overview”](#) on page 16 for an overview of the items and processes involved in creating a Release.

One of the first Steps in establishing a controlled Release is to create a new Release in the Release Workbench. To create a Release:

1. Click the **Change Management** screen group and click the **Releases** icon. The Release Workbench opens.

2. Click on **New Release** on the Release Workbench or select **File -> New Release** from the menu. The Release window opens.

Package ID	Description	Run Before	Run After	Status	Origin	Added On	Added By
------------	-------------	------------	-----------	--------	--------	----------	----------

3. Enter a Release Name and any additional general information that you would like to help define the Release.
4. Add any Packages and Requests.
5. Define any Package dependencies.
6. Click **Open Release** to allow other Release Management users to add Packages and Requests to the Release.
7. Click **Save** to save the Release information.

Refer to the following sections for additional instructions on configuring your Release:

- [“Adding a Package”](#) on page 33
- [“Adding a Request”](#) on page 38
- [“Dependencies and Run Groups”](#) on page 14
- [“Creating a Distribution”](#) on page 45
- [“Running Distributions through a Workflow”](#) on page 47

Adding a Package

There are four ways in which a Package can be associated with a Release:

- [“Adding a Package Through the Release Window”](#) on page 33
- [“Adding a Package Through the Package Window”](#) on page 35
- [“Adding a Package by Acting on a Ready for Release Workflow Step”](#) on page 35
- [“Adding a Package from a Request”](#) on page 38

Adding a Package Through the Release Window

When defining a Release in the Release window, the Release Manager may decide to manually add Packages to the Release.

In order to add a Package to a Release:

1. Navigate to the Release you would like to add a Package to.
2. Click **Add** on the **Packages** tab of the Release window. The Package Selection window opens.

Package Selection

Package No.: [] Package Group: []

Workflow: [] Package Status: ALL

Assigned User: [] Created By: [] Priority: ALL

Assigned Group: [] Object Type: [] Package Type: ALL

Object Name: []

Property

Eligible Action Only

Submitted Only

Dates

Date Created On [] [] To [] []

Date Modified

Date Submitted Within last [] day(s)

Max Rows: 200 Clear List

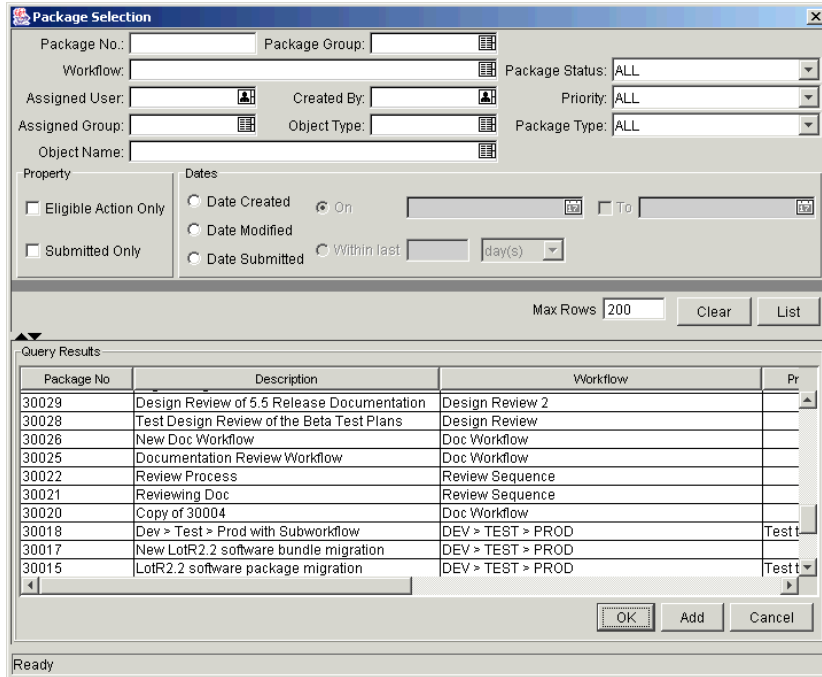
Query Results

Package No	Description	Workflow	Project	Package Status	Priority	Assigned Group
------------	-------------	----------	---------	----------------	----------	----------------

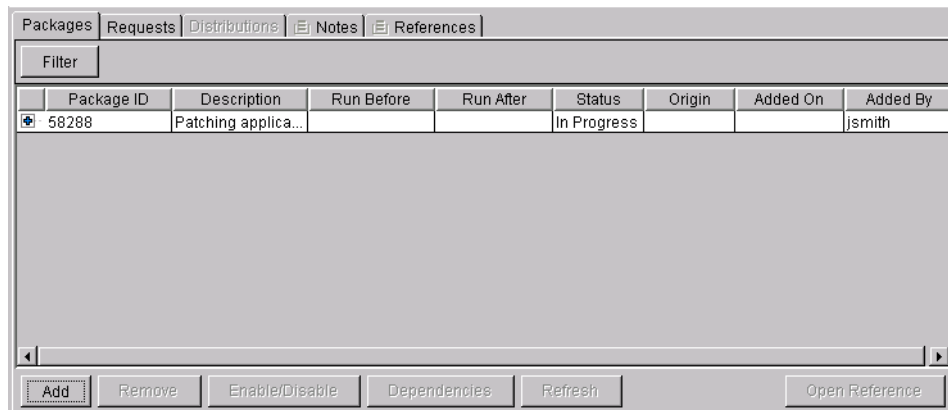
OK Add Cancel

Ready

3. Enter any desired search criteria and click **List**. Packages matching your search criteria are dynamically listed in the Query Results list of this window.



4. Select the Packages to be added to the Release.
5. Click **Add**. If the Packages reference any other Packages or Requests, you will then be prompted to include or exclude them.
6. Click **Close** after all desired Packages have been added. This will return you to the Release window which displays the newly added Packages.



7. Click **Save** to save the Release information.

Adding a Package Through the Package Window

Users, other than the Release Managers, associate Packages with a Release through the Package window in Change Management. To add a Package to a Release, reference the Release through the Package **References** tab.

The References window is shown in *Figure 4-1*.

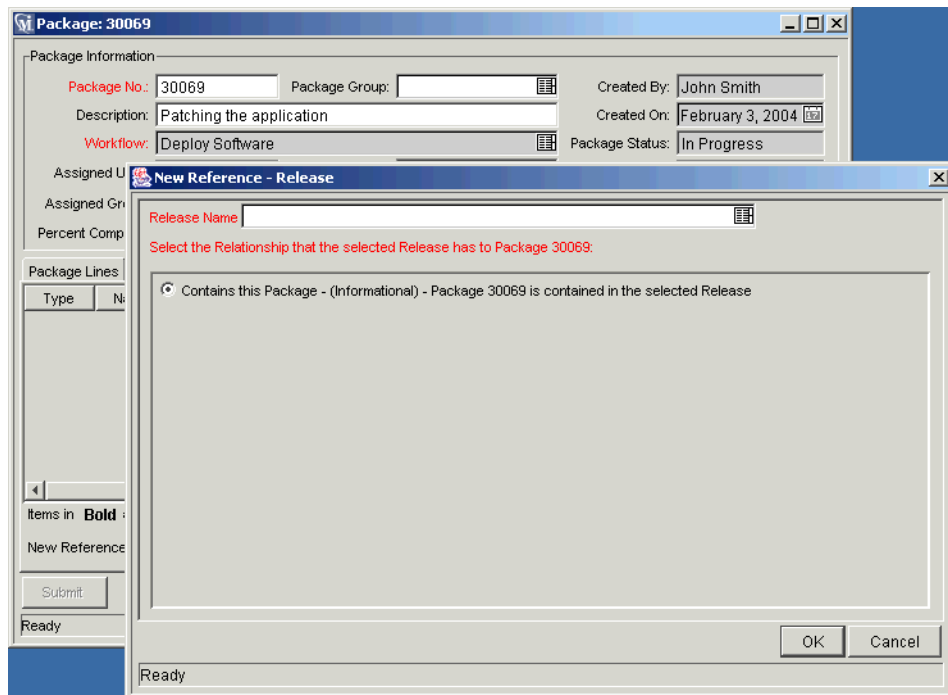


Figure 4-1 Package Added to Release Through Package Reference

Adding a Package by Acting on a Ready for Release Workflow Step

Release Management provides a Ready for Release Workflow Step source which can add significant value to your Release process. When a Package Line reaches the Ready for Release Workflow Step and is executed, the status of the Package Line is changed to Confirmed. As soon as all of the lines in a Package are Confirmed, then the entire Package's status becomes Ready for Release. Once an entire Package becomes Ready for Release, the Release Distribution

can feed back to each of its associated Packages so that each of them can transition to the next Workflow Step.



Note

You can reject the Ready for Release Workflow Step by choosing **Bypass Execution** or **Override Status**. This will stop the Package from getting released but will still allow it to continue through its own Workflow.

To act on a **Ready for Release** Workflow Step:

1. Navigate to the Package you wish to add.
2. Click the Package's **Status** tab.

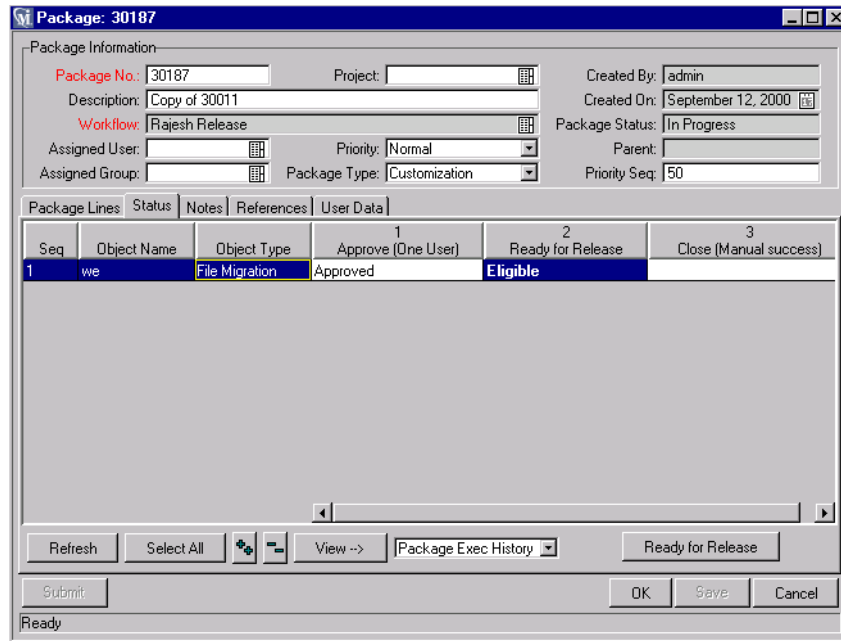
The screenshot shows a window titled "Package: 30187" with a "Package Information" section containing fields for Package No. (30187), Project, Description (Copy of 30011), Workflow (Rajesh Release), Assigned User, Priority (Normal), Assigned Group, Package Type (Customization), Created By (admin), Created On (September 12, 2000), Package Status (In Progress), Parent, and Priority Seq (50). Below this is a "Package Lines" tab with a table:

Seq	Object Name	Object Type	1 Approve (One User)	2 Ready for Release	3 Close (Manual success)
1	we	File Migration	Approved	Eligible	

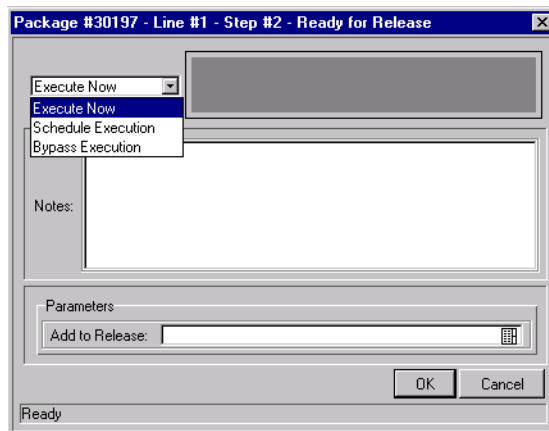
At the bottom of the window are buttons for Refresh, Select All, View -->, Package Exec History, Action, Submit, OK, Save, and Cancel. The status "Ready" is shown at the bottom left.

3. Select the Workflow Step to be acted upon.

Workflows that are eligible for action are displayed in bold. Once an eligible Workflow Step is selected, the button at the bottom right of the **Status** tab will change its title (originally **Action**) to the name of the Step.



4. Click **Ready for Release**. The Package Action window opens.



5. Select the Step's result from the drop down list. You can also enter any relevant notes in this window.
6. Select the Release you want the Package to be associated with from the Add to Release auto-complete list. This field may be required, depending on the Workflow Step configuration (see [“Configuring Packages to Feed into a Release”](#) on page 23).
7. Once finished, click **OK** to save the result.

The Package is now ready to be Released.

Adding a Package from a Request

When a Request that is included in a Release spawns a Package, that Package is automatically included in the Release. This becomes a powerful method for including Packages in a Release.



A Development Manager can include a Request to fix a software bug in the Release. That Request's Workflow can be configured to automatically create a Package to migrate changes into production. That Package will automatically be included in the Release.

See *Processing Packages (Change Management)* for additional details.

Adding a Request

Requests can be added to a Release to track information associated with the Release. For example, the Release Manager may want to track which software bugs or enhancements (captured using Demand Management Requests) were implemented during the Release timeframe.

There are two ways in which a Request can be associated with a Release:

- [“Adding a Request Through the Release Window”](#) on page 38
- [“Adding a Request Through the Requests Window”](#) on page 40

Adding a Request Through the Release Window

To add a Request to a Release from the Release window:

1. Navigate to the Release you wish to add a Request to.
2. Click the **Requests** tab.
3. Click **Add**. The Request Selection window opens.

Request Selection

Request No.: Request Type:

Department: ALL Sub-Type: Created By:

Workflow: Linked Project/Task: Contact Name:

Priority: ALL Request Group: Company:

Assigned User: Assigned Group: Application:

Keywords:

Request Status:

Include Closed Requests: Yes No Only Eligible Requests: Yes No

Dates

Date Created On To

Date Modified Within last day(s)

Max Rows Clear List

Query Results

Request	Request Type	Description	Request Status	Priority	Created By	Application
---------	--------------	-------------	----------------	----------	------------	-------------

OK Add Cancel

Ready

4. Enter search criteria and click **List**. Requests matching your search criteria are dynamically listed in the Query Results list of this window.

Request Selection

Request No.: Request Type:

Department: ALL Sub-Type: Created By:

Workflow: Linked Project/Task: Contact Name:

Priority: ALL Request Group: Company:

Assigned User: Assigned Group: Application:

Keywords:

Request Status:

Include Closed Requests: Yes No Only Eligible Requests: Yes No

Dates

Date Created On To

Date Modified Within last day(s)

Max Rows Clear List

Query Results

Request	Request Type	Description	Request Status
30103	OraApps Application Issue	OE GUI displaying wrong background colors	New
30102	OraApps Application Issue	OE menuitems not complete	New
30101	OraApps Application Issue	AR GUI showing wrong alarm colors.	New
30100	OraApps Application Issue	AR not listing new accounts	New
30099	OraApps Application Issue	AR crashes during logon	New
30098	OraApps Application Issue	Submit button not working	New
30097	OraApps Application Issue	Date field not enabled after AR submit	Assigned
30095	OraApps Status Update Request	Status Rollin from external resources (Dec 2003)	Assigned

OK Add Cancel

Ready

5. Select the Request to be added to the Release.
6. Click **Add**. If there are any referenced entities, you will then be prompted to include or exclude them.
7. Click **Close**. This will return you to the Release window which displays the newly added Request.
8. Click **Save** to save the Release information.

Adding a Request Through the Requests Window

Users, other than the Release Manager, must associate a Request with a Release through the Request page in Demand Management.



Note

Users can only add Requests to an Open Release. Once the Release reaches the Code Freeze or Closed state, Requests can only be added by the Release Manager from the Release window.

To add a Request to a Release:

1. Navigate to the Request you wish to add to the Release.
2. Click the **References** section.
3. Select **Release** from the New Reference drop down list and click **Add**. The Reference Release window opens.
4. Select the desired Release from the Release auto-complete list. Only Releases that the Release Manager has opened by clicking **Open Release** will appear in the Release list.

Reference Release

*Release:

*Relationship: Contains this Request - (Informational) - Request 30041 is contained in the selected Release

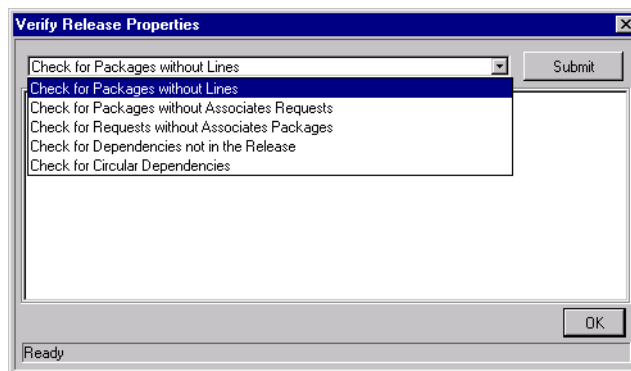
Add Cancel

Verifying the Release

When you finish assembling the Release (Packages, Requests and setting Dependencies), you can verify that your Release is properly configured.

To verify your Release:

1. Navigate to the Release you wish to verify.
2. Click **Verify** in the Release window. The Verify Release Properties window opens.

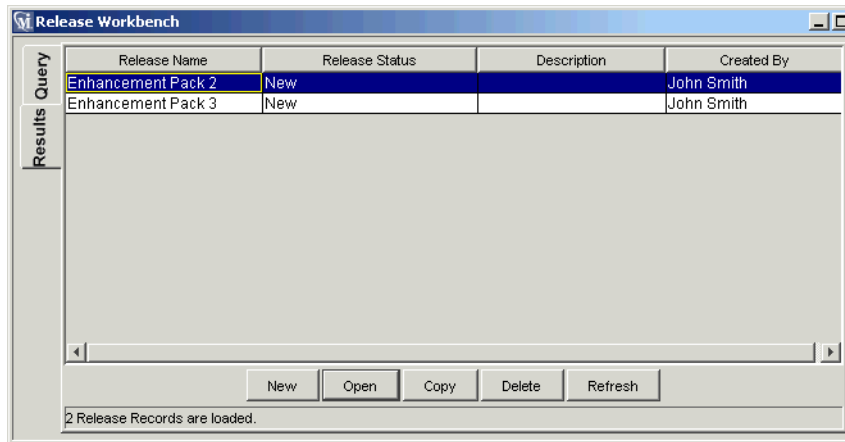


3. Select the property that you would like to check for from the drop down list. The verify options include:
 - **Check for Packages without Lines**
 - **Check for Packages without Associated Requests**
 - **Check for Packages without Associated Packages**
 - **Check for Dependencies not in the Release**
 - **Check for Circular Dependencies**
4. Click **Submit**. Any errors will be reported in the window.
5. Click **OK** to close the Verify Release Properties window.

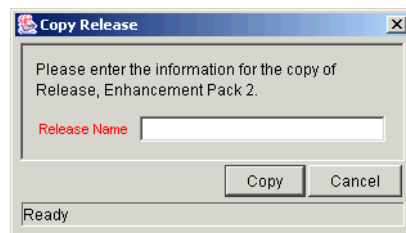
Copying an Existing Release

You can create a new Release by copying and editing an existing Release. To copy a Release:

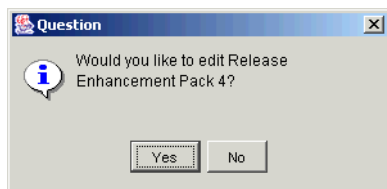
1. Click the **Change Management** screen group and click the **Releases** icon. The Release Workbench opens.
2. Locate and select the Release to be copied in the **Results** tab of the Release Management Workbench.



3. Click **Copy**. The Copy Release window opens.



4. Enter the new Release Name and click **Copy**. A Question dialog opens.



5. Click **Yes** to edit the Release.

6. Enter the new Description and add any additional information that you would like to capture in the Release. You can add additional Packages, Requests, Notes, References, etc.
7. Click **Save** to save the Release Information.

Chapter 5

Processing a Release

The following sections provide instructions for processing Release Distributions:

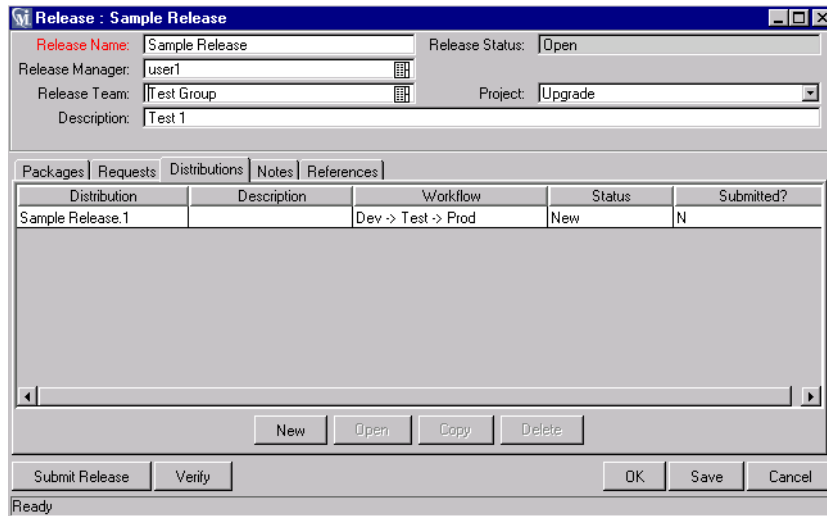
- *Creating a Distribution*
- *Enabling / Disabling Package Lines in a Distribution*
- *Running Distributions through a Workflow*
- *Completing the Distribution*

Creating a Distribution

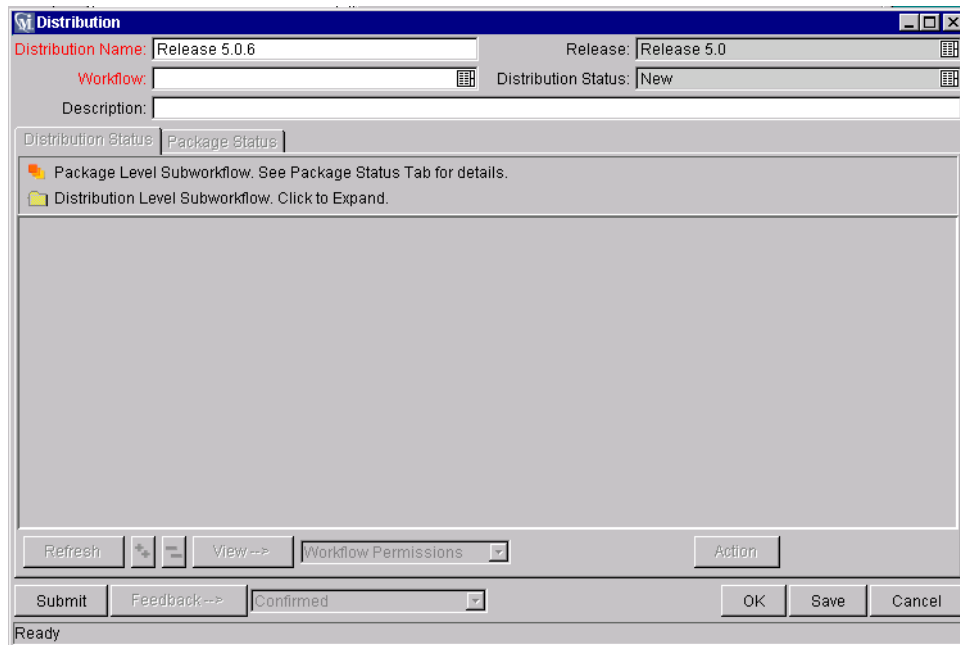
A Distribution is a deployment of a Release. In a Distribution, the Release Manager specifies which Workflow will control the Release process and which of the Release's Packages will be included. See "*Role of Workflows in Release Management*" on page 10 for more information.

To create a Distribution:

1. Navigate to the Release you wish to create a Distribution for.
2. Click the **Distributions** tab.



3. Click **New**. The Distribution window opens.




4. Enter the new Distribution Name and Description.
5. Select the Workflow that you would like this Distribution to follow. See [“Role of Workflows in Release Management”](#) on page 10 for additional information.
6. Select any Packages to disable and click **Enable/Disable**. Disabled Packages will appear in italics.

7. Click **Submit** to run the Distribution through the Workflow specified.
The Release will begin running along the assigned Workflow.

Enabling / Disabling Package Lines in a Distribution

To disable a Package Line in a Distribution:

1. Open the Distribution from the Release's **Distribution** tab.
2. Click the **Package Status** tab.
3. Locate the Package Line that you want to disable. Click the expand Run Groups button () to display all of the Packages. Note that the Packages may be filtered. You may have to change your filter to show the desired Package.
4. Select the Package Line to disable. You can also select to disable an entire Package. Disabling a Package Line in an active Run Group (within a Package-Level Subworkflow) will cancel the Package Line.
5. Click **Disable**. The disabled Package Line is displayed in italics.

Note

You can re-enable the Package Lines by selecting the lines and clicking **Enable**. If you disable a Package Line in an active Run Group, you can't re-enable the Line until the Run Group completes. If the disabled Package Line was not in an active Run Group, you can re-enable it immediately.

Running Distributions through a Workflow

The last Step involved in creating a Release is running the Release through a Change Management Workflow. Running the Release through a Workflow implies running any decisions, commands, Token evaluations, or other tasks for the Distribution as a whole.

Processing the Distribution requires that you process Steps in both the **Distribution Status** and **Package Status** tabs.

Processing Distribution Steps

Active Workflow Steps appear in bold text. Select the active line and click the **Action** button to process that Step. From the **Distribution Status** tab, you can expand and act on all Distribution Steps (including Distribution-Level Subworkflow Steps). To process Package Lines, you must use the **Package Status** tab.

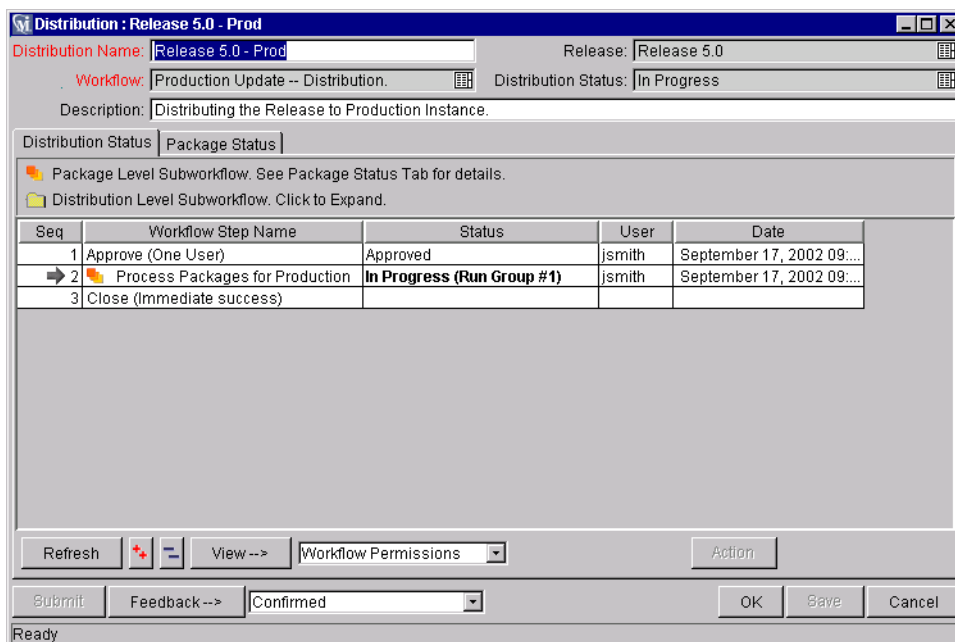


Figure 5-1 Distribution Status Tab

Processing Package Lines

Package Lines can be processed individually or in groups. Package Lines that are available for your action appear in bold text. Select an active Package Line and click the **Action** button to process that individual Step.

Release Management provides a convenient interface for processing groups of Package Lines (in the same Workflow Step) simultaneously. This is done by viewing and selecting the Package statuses.

To select all Package Lines within a Workflow Step of a particular status:

1. Open the Distribution's **Package Status** tab.
2. Expand all Run Groups and Workflows.
3. Click the plus sign (**+**) in the Description column. This displays a status summary of all the Package Lines in each Workflow Step.

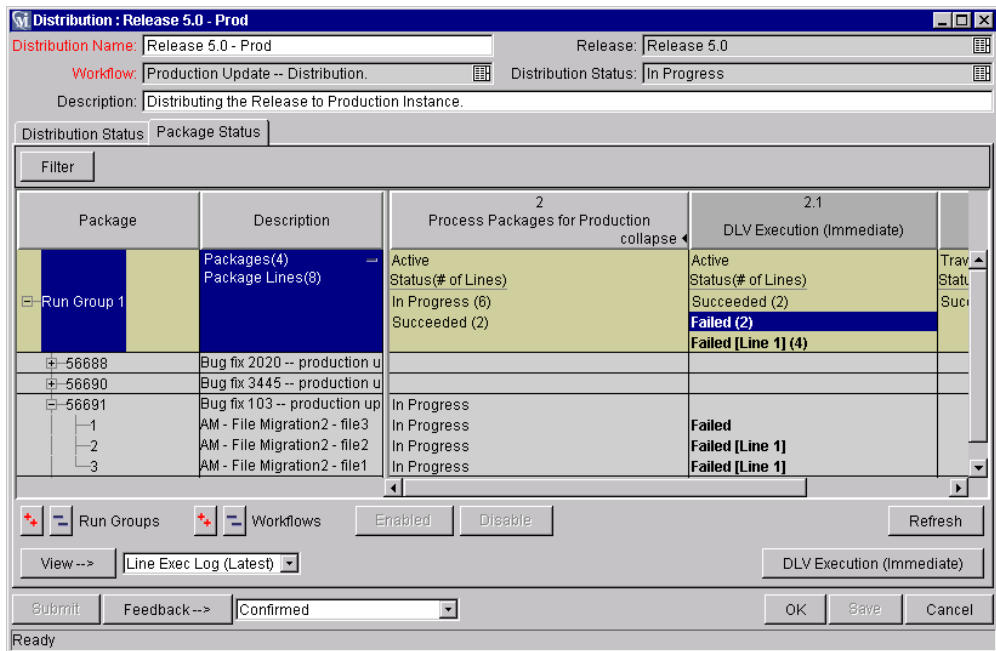


Figure 5-2 Package Status Tab

4. Select the summary. Again, items that are available for your action appear in bold text. When you select the summary, all Package Lines in that state are automatically selected. You can deselect individual items using **Ctrl + click**.
5. Click the **Action** button to process all of the selected Package Lines.
6. Proceed to the next Step in the Package process or Distribution process (depending on your pre-configured process). To view updates in the **Distribution Status** tab, click on the **Distribution Status** and click **Refresh**.

Completing the Distribution

When the Distribution completes and the Workflow closes, a value can be returned to the Ready for Release Workflow Steps. Those Packages can then continue to process based on that Validation. That value is sent by clicking **Feedback** in the Distribution window.

Chapter 6

Viewing Relevant Release Data

All Release Management users with Change Management power licences can view Releases. Because hundreds of Packages and Requests can be included in each Release, users may want to limit which Packages and Requests are displayed. This will help them locate and monitor only Packages that are meaningful to their work. For example, a Programmer can display only the Packages that he created.

This filtering is performed in the Release window in the **Packages** and **Releases** tabs using the **Filter** button.

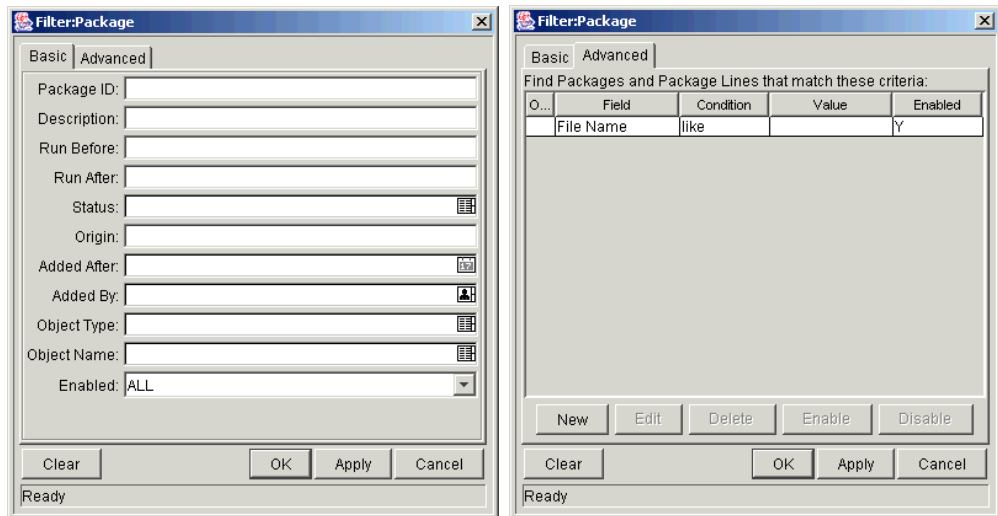
The following topics are covered:

- *Filtering the Displayed Packages*
- *Filtering the Displayed Requests*
- *Editing Packages and Requests*

Filtering the Displayed Packages

To filter which Packages are displayed in the Release window's **Packages** tab:

1. Open the Release.
2. Click **Filter** in the **Packages** tab. The Filter:Packages window opens. This window consists of two tabs: **Basic** and **Advanced**.



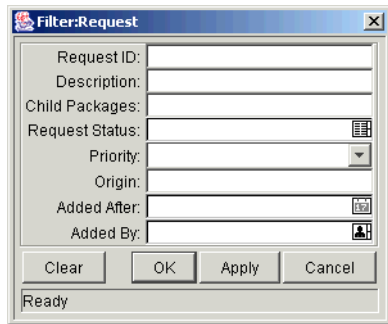
The **Basic** tab is used to limit which Packages are displayed based on common Package fields, such as Package ID, Description, and Object Types. The **Advanced** tab provides an interface for filtering Packages based on the following:

- Package User Data fields
 - Package Line User Data fields
 - Object Type fields
3. Select the filter criteria from the **Basic** and **Advanced** tabs.
 4. Click **OK**. Only the Packages matching the specified criteria are displayed.

Filtering the Displayed Requests

To filter which Requests are displayed in the Release window's **Requests** tab:

1. Click the **Requests** tab in the Release window.
2. Click **Filter**. The Filter:Requests window opens.



3. Select the filter criteria.
4. Click **OK**. Only the Requests matching the specified criteria are displayed.

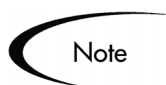
Editing Packages and Requests

Users can view Package and Request information in the Release Management window. All edits to those Packages and Requests are made in their respective product windows. For example, all changes to an associated Request must be made in Demand Management.

Release Management provides convenient access to these Packages and Requests. To open a Package or Request from the Release window:

1. Select the Packages or Requests from their respective tabs.
2. Click **Open**. The Packages or Requests open in their associated products.
3. Make any desired changes.
4. Click **Save**.

The updated Request or Package information is updated in the system, and also in the Release window.



Note

Updated Package and Request information is not updated in existing Distributions. If you want the changes to be reflected in a Distribution, create a new Distribution.

Appendix

A

Release Management Screens and Fields

This appendix describes screens and fields commonly used in Release Management.

Release Window

The Release window contains all of the information relevant to a Release. The Release window allows the Release Manager to manage and manipulate the Release in preparation for Distribution. See *“Creating a Release”* on page 31 and *“Processing a Release”* on page 45 for more information on working with Releases.

The Release window is divided into six sections:

- *“Release General Information Region”* on page 56
- *“Packages Tab”* on page 57
- *“Requests Tab”* on page 61
- *“Distributions Tab”* on page 63
- *“Notes Tab”* on page 70
- *“References Tab”* on page 71

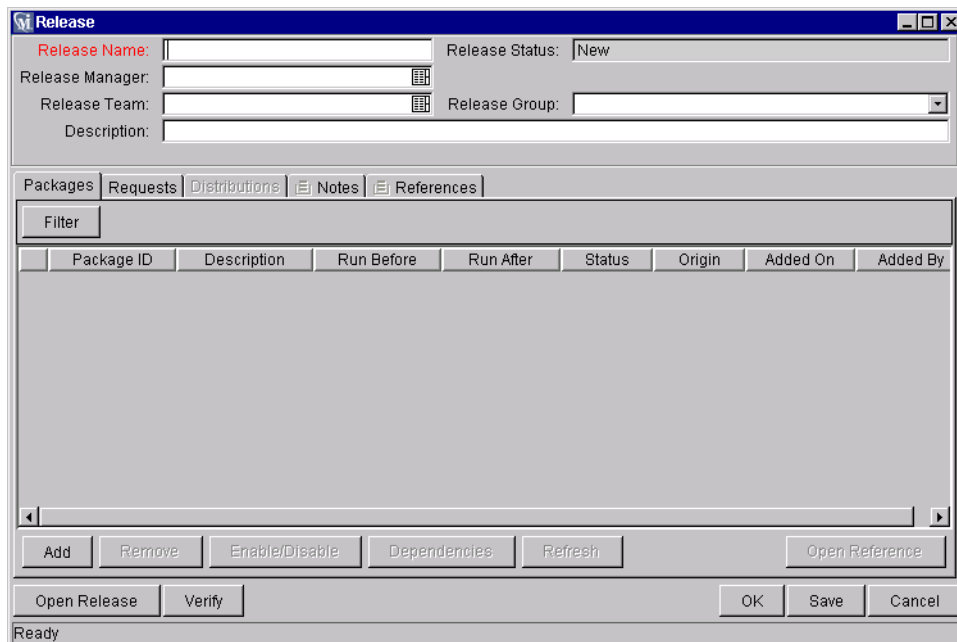


Figure A-1 Release Window

Release General Information Region

The Release General Information Region contains the common fields that define Release, such as the Release Name and the Release Status. [Table A-1](#) defines the fields included in the Release General Information Region.

Table A-1. Release General Information Region Fields

Field	Description
Release Name	The name of the Release.
Release Status	The current status of the Release: New , Open , Code Freeze , or Closed .
Release Manager	The name of the Release Management user who has control over the particular Release. Only Release Management users that have the MANAGE RELEASES Access Grant will appear in this list.
Release Team	The users who have access to the particular Release. This is a validated list of Security Groups and is used for informational purposes only.
Release Group	A generic grouping of Releases which allows the Release Manager to group Releases into logical categories such as Customization.

Table A-1. Release General Information Region Fields

Field	Description
Description	The description of the Release.
Verify	Accesses a utility to locate any inconsistencies in the Release definition.
Open Release	Enables other Release Management users to add Packages or Requests to the Release.
Submit Release	Signifies the Release is ready to execute. Clicking the button will prompt the Release Manager to define a Distribution.
Close Release	Changes the status of the Release to Closed . A closed Release cannot be reopened or edited.
OK	Saves all changes to the database and closes the Release window.
Save	Saves changes to the database but leaves the window open. The Save button is enabled only when unsaved changes exist.
Cancel	Cancels any unsaved changes and closes the window.

Packages Tab

The Packages tab is used to view, add, remove, set dependencies for, organize, and enable or disable Packages in a Release. In addition to the Packages already associated with a Release, new Packages may be added by the Release Manager through the Package Selection window. The **Packages** tab's columns and buttons are defined in [Table A-2](#).



Note

The **Packages** tab is inaccessible for people without access to Change Management. Users who only utilize Demand Management have access to the Release Management Console but will not see the **Packages** tab.

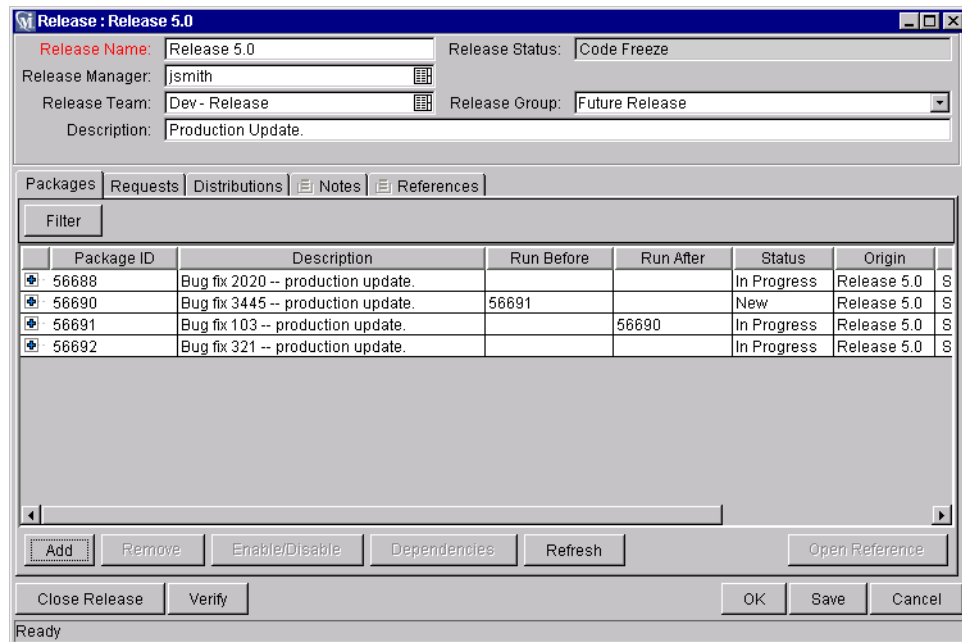


Figure A-2 Packages Tab

Table A-2. Packages Tab Columns and Buttons

Field	Description
Filter	Opens the Filter:Package window where the user can select criteria to choose which Packages are displayed on the Packages tab.
Package ID	Identification number associated with the Package.
Description	The description of the Package.
Run Before	Displays any Packages which must run before the Package listed in the Package ID column.
Run After	Displays any Packages which must run after the Package listed in the Package ID column.
Status	The status of the Package.
Origin	The name of the Release to which the Package was originally added.
Added On	The date that the Package was added to the Release.
Added By	The name of the user who added the Package to the Release.

Table A-2. Packages Tab Columns and Buttons

Field	Description
Add	Opens the Package Selection window, where users can add new Packages to the Release. When adding a Package, the user is presented the option of also adding all referenced Packages and Requests.
Remove	Removes a selected Package from the Release.
Enable/Disable	Allows the Release Manager to keep Packages as references (disable), without blocking deployment of the Release. Disabled Packages are displayed in italics.
Dependencies	Opens the Dependencies for Package window where dependencies can be defined for Packages in the Release. The Release Manager can configure Packages to run before or run after the selected Package(s). Also displays dependencies established by other Release Management users.
Refresh	Refreshes the list of added Packages, returning it to its last saved state.
Open	Allows the Release Manager to open the selected Package in Change Management.

Filter:Package Window

The Filter:Package window is used to limit which Packages are displayed on the Release Window's **Packages** tab. This window is accessed by clicking the **Filter** button on the **Packages** tab.

The Filter:Package window consists of two tabs: **Basic** and **Advanced**. The **Basic** tab is used to limit which Packages are displayed based on common Package fields, such as Package ID, Description, and Object Types.

The screenshot shows the 'Filter:Package' dialog box with the 'Basic' tab selected. The dialog contains several input fields: Package ID, Description, Run Before, Run After, Status (with a list icon), Origin, Added After (with a date icon), Added By (with a user icon), Object Type (with a list icon), Object Name (with a list icon), and Enabled (a dropdown menu set to 'ALL'). At the bottom, there are 'Clear', 'OK', 'Apply', and 'Cancel' buttons, and a 'Ready' status bar.

Fields in this window are defined in [Table A-2 on page 58](#).

The **Advanced** tab provides an interface for filtering Packages based on the following:

- Package User Data fields
- Package Line User Data fields
- Object Type fields

The **Advanced** tab functions in the same manner as the **Advanced** tab on the Workbench's **Query** tab.

The screenshot shows the 'Filter:Package' dialog box with the 'Advanced' tab selected. The dialog displays a table with the following data:

O...	Field	Condition	Value	Enabled
	File Name	like		Y

Below the table are buttons for 'New', 'Edit', 'Delete', 'Enable', and 'Disable'. At the bottom, there are 'Clear', 'OK', 'Apply', and 'Cancel' buttons, and a 'Ready' status bar.

Requests Tab

The **Requests** tab, shown in *Figure A-3*, is used to add, view and act on the Requests in a Release. Requests can be added to a Release by:

- Release Manager directly adding the Request through the **Requests** Tab
- Adding as a reference to a Package in the Release
- Referencing the Release from the Request window

See “*Adding a Request Through the Release Window*” on page 38 for more information on adding Requests to a Release.

The **Requests** tab’s columns and buttons are defined in *Table A-3*.

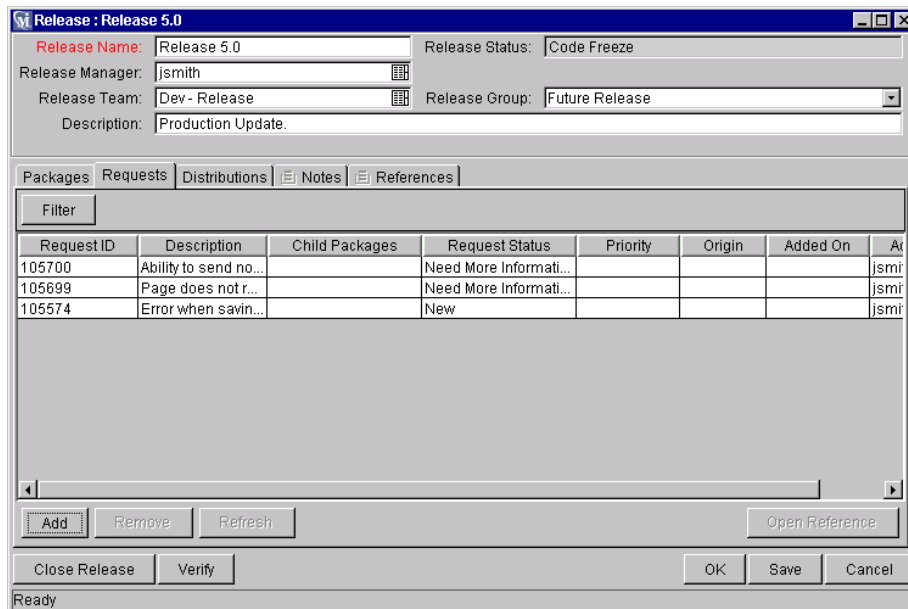


Figure A-3 Requests Tab

Table A-3. Requests Tab Columns and Buttons

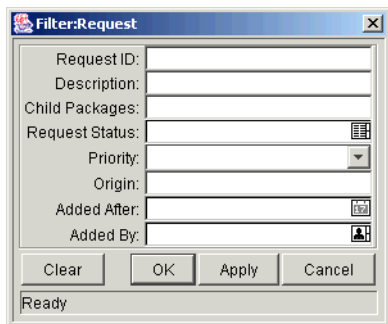
Field	Description
Filter	Opens the FILTER:REQUEST window where the user can select criteria determining which Requests are displayed in the Requests tab.
Request ID	Identification number associated with the Request.
Description	The description of the Request.

Table A-3. Requests Tab Columns and Buttons

Field	Description
Child Packages	Displays all Packages that were created from the Request.
Request Status	The status of the Request. Statuses are configurable in Release Management.
Priority	Displays the Request priority taken from the Request general information region.
Origin	The name of the Release to which this Request was originally added.
Added On	The date that the Request was added to the Release.
Added By	The name of the user who added the Request to the Release.
Add	Opens the Request Selection window where users can add new Requests to the Release. Adding a Request gives the option of adding all the related Packages and Requests.
Remove	Removes a selected Request from the Release.
Refresh	Refreshes the list of added Requests, returning it to its last saved state.
Open Reference	Opens the selected Request in Demand Management.

Filter:Request Window

The Filter:Request window is used to select criteria determining which Requests are displayed in the Release's **Requests** tab. See *Configuring a Request Resolution System* for definitions of these fields.



Distributions Tab

The **Distributions** tab, shown in [Figure A-4](#), is used to view Distributions of a Release. Distributions are used to distribute a Release through a Workflow process. New Distributions are created by the Release Manager through the Distribution window, which is accessed through the **Distributions** tab. When a new Distribution is submitted, the Release runs through the associated Release Distribution Workflow.

The Distributions columns and buttons are defined in [Table A-4](#).

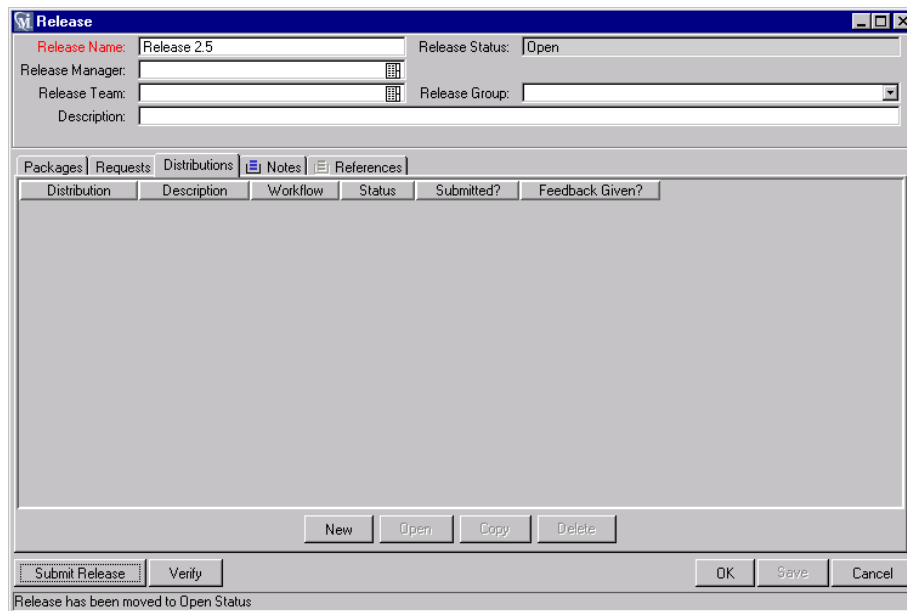


Figure A-4 Distributions Tab

Table A-4. Distributions Tab Columns and Buttons

Field	Description
Distribution	The Distribution name. The name is defined in the Distribution window.
Description	The description of the Distribution. The description is defined in the Distribution window.
Workflow	The Workflow through which the Release Distribution runs.
Status	The current status of the Distribution.
Submitted	The submission status of the Distribution.

Table A-4. Distributions Tab Columns and Buttons

Field	Description
Feedback Given?	Indicates whether feedback has been given to all Packages in the Release in a “Ready for Release” status.
NEW	Opens the Distribution window where users can define a Distribution.
OPEN	Opens the selected Distribution in the Distribution window.
COPY	Copies the selected Distribution.
DELETE	Removes the selected Distribution from the Release.

Distribution Window

The Distribution window, shown in [Figure A-5](#), is used to create a new Distribution for a given Release. This window includes two tabs:

- ***Distribution Status Tab:***
Used to process the Release Distribution along the specified Workflow.
- ***Package Status Tab:***
Used to enable and disable Package Lines included in the Release and view the progress of Package Lines as they are processed through any Package-Level Subworkflows. Users can also use this tab to interact with individual Package Lines (for example, to reset a Package Line that has failed in an Execution Step).

This Distribution window is accessed from the **Distribution** tab in the Release window. The Distribution window fields and buttons are defined in [Table A-5](#).

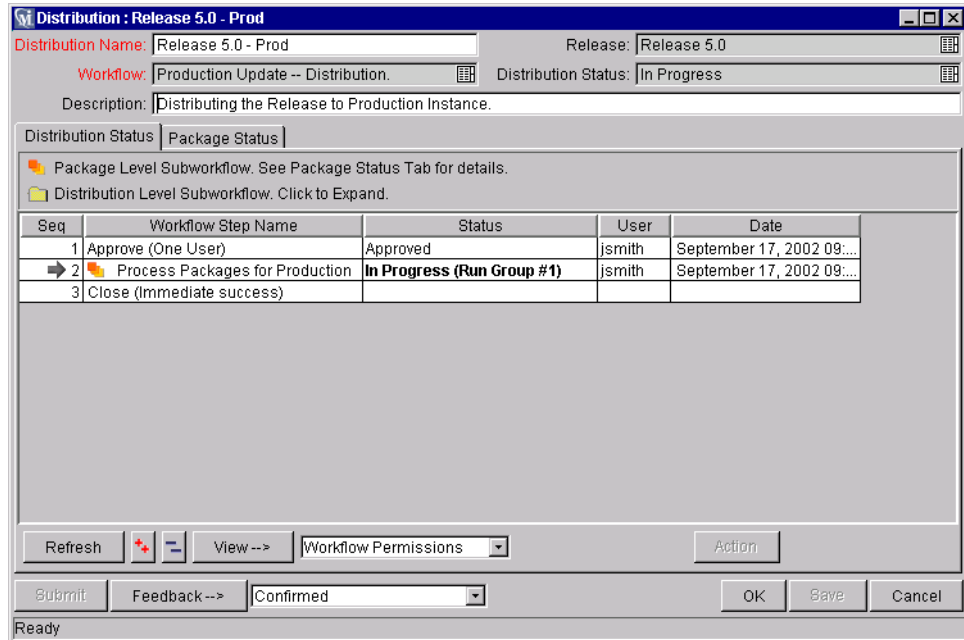


Figure A-5 Distribution Window

Table A-5. Distribution Window Fields

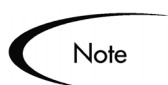
Field	Description
Distribution Name	The Distribution name. The field defaults to the Release Name and Distribution Number.
Release	The name of the Release to which the Distribution belongs.
Workflow	Validated list of Release Distribution Workflows which can be used with the Distribution. Workflows must be enabled for use as a Distribution to appear in this field.
Distribution Status	The current status of the Distribution.
Description	The description of the Distribution.
Distribution Status Tab	This tab is used to process the Release Distribution. Fields and buttons included on this tab are detailed in <i>“Distribution Status Tab”</i> on page 66.
Package Status Tab	This tab is used to process the Package Lines included in a Release. Fields and buttons included in this tab are detailed in <i>“Package Status Tab”</i> on page 68.

Table A-5. Distribution Window Fields

Field	Description
Submit	Saves changes and begins to process the Distribution through the specified Workflow.
Feedback -->	The Release Status which will be fed back to Packages in the "Ready for Release" state when the Feedback button is clicked.
OK	Saves changes to the database and closes the Distribution window.
Save	Saves changes to the database but leaves the window open. The SAVE button is enabled only when unsaved changes exist.
Cancel	Cancel any unsaved changes and closes the window.

Distribution Status Tab

The **Distribution Status** tab is used to process Distribution Workflow Steps. This can include activities ranging from approval Steps to Steps that automatically execute system commands.





Note

Note: Package Line processing (including Token resolution and Object Type command execution) happens in Package-Level Subworkflows. These Steps are tracked and processed in the **Package Status** tab.

Table A-6. Distribution Status Tab Fields

Field	Description
Seq	The sequence number of the Workflow Step in the Release Distribution. Workflow Steps that are available for user action are denoted by an arrow located in this column.
Workflow Step Name	The name of the Workflow Step, Distribution-Level Subworkflow, or Package-Level Subworkflow

Table A-6. Distribution Status Tab Fields

Field	Description
Status	<p>The current state of the Workflow Step. This column indicates whether or not a Step is Approved, is Eligible for action or is still In Progress. If the word in the Status column appears in bold face type, then the user has the appropriate permissions to act on that eligible Step.</p> <p>Note: Users can only directly process Distribution Workflow Steps from the Distribution Status tab. To act on Steps in a Package-Level subworkflow, use the Package Status tab.</p>
User	The username of the person that acted on a Step.
Date	Initially, the Date represents the date that the Distribution entered that Workflow Step. When the Workflow Step has been acted on, the Date represents the date that the Request was acted on and left that Step.
Refresh	Reloads the page with updates from the Package Status tab.
Expand All 	Expands all of the Subworkflow Steps in the table.
Collapse All 	Collapses all of the Subworkflow Steps in the Workflow.
View -->	<p>Select an item from the drop down list and click View to see the information. Use this feature to view the following:</p> <ul style="list-style-type: none"> ● Workflow Permissions ● Graphical View ● Distribution Transaction History ● Decision Detail ● Distribution Execution Log ● Latest Batch Execution Log
Action	When a Workflow Step is selected, this button changes its name (originally Action) to the given Step name or Action button label defined for the Step. Click the button to process the Distribution through the Step.

Package Status Tab

The **Package Status** tab is used enable and disable Package Lines included in the Release and then process the enabled Packages through any Package-Level subworkflows included in the Release Distribution Workflow. All Package Line processing occurs using this tab. See *“Running Distributions through a Workflow”* on page 47 for details.

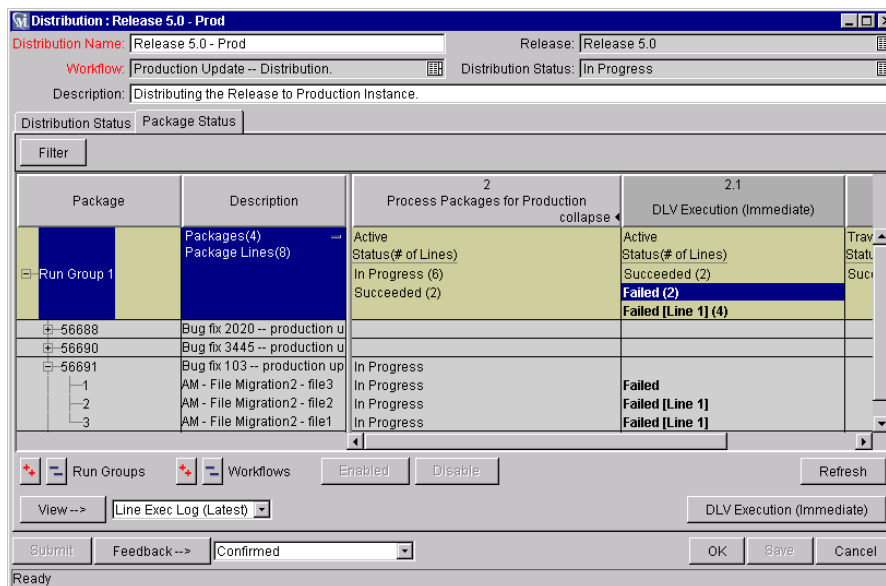
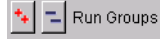



Figure A-6 Package Status Tab

Table A-7. Package Status Tab Fields

Field	Description
Filter	Opens the Filter:Packages and Package Lines window where you can specify which Packages in the Release are displayed. Filtering does not add or remove Packages from the Distribution.
Package	Lists all Packages included in the Release. Packages can be enabled or disabled by selecting and clicking Enable or Disable .
Description	Description of the Package. Use the + and - symbols in this column this to show or hide the status summary of the Package Lines in each submitted Workflow Step. You can then select the summary line to mass-select all lines with that status. This is helpful when you want to process or override all Package Lines of a particular status. You can deselect individual items by using Ctrl + click.

Table A-7. Package Status Tab Fields

Field	Description
Expand / Collapse Run Groups 	Expands or collapses all of the Run Groups on the Package Status tab. You can expand or collapse individual Run Groups by clicking the + or - sign in the Package column.
Expand / Collapse Workflows 	Expands or collapses all of Workflow Steps of the Package-Level Workflows included in the Release Distribution Workflow. You can expand or collapse individual subworkflows by clicking the top of the subworkflow column (on the first subworkflow Step).
Enabled	Enables the selected Package Line. By default, all Package Lines in a Distribution are initially enabled. Disabled Package Lines appear in italics.
Disabled	Disables the selected Package Line. Disabled Package Lines appear in italics.
Refresh	Refreshes the screen to recognize the updated Package information.
View -->	<p>Select an item from the drop down list and click VIEW to see the information. Use this feature to view the following:</p> <ul style="list-style-type: none"> • Line Exec Log • Package Exec History • Graphical View • Line Permissions • Line Transaction History • Decision Detail
Action	When a Workflow Step is selected, this button changes its name (originally Action) to the given Step name or Action button label defined for the Step. Click the button to process Package Line through the Step.

Filter: Packages and Package Lines

This window allows you to specify which Packages included in your Release are displayed in the **Package Status** tab. Filtering does not add or remove Packages from the Distribution. You can select to limit the displayed Packages and Package Lines based on any of the following criteria:

- Package No.
- Description
- Object Type
- Object Name
- Run Group
- Enabled

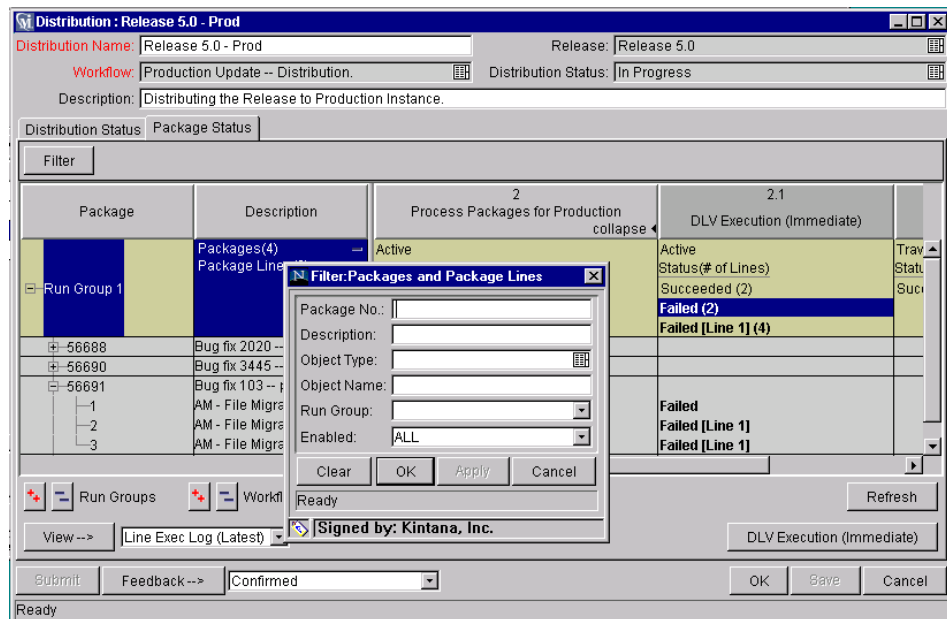


Figure A-7 Filter: Packages and Package Lines

Notes Tab

The **Notes** tab contains the free-form notes attached to the Release. As a Release is processed through its Workflow, different users enter information relevant to the Release. As they enter information (using the New Notes section of this tab) and **Save**, this information is merged with the existing notes for the Release. The new information is placed at the top of the notes along with general information indicating the user and update time.

Releases with notes display an icon on the **Notes** tab. The **Notes** tab is shown in [Figure A-8](#).

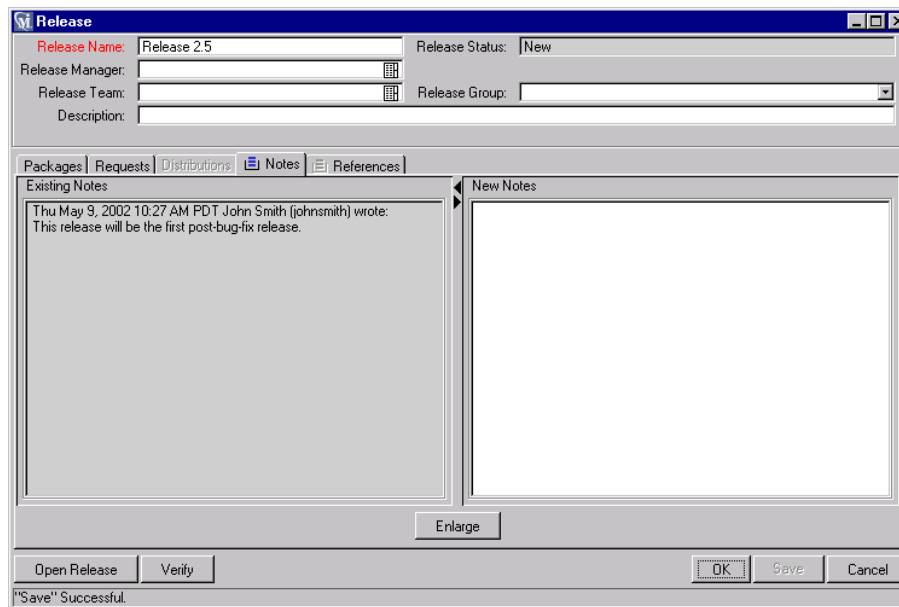


Figure A-8 Notes Tab

You can view the current notes for the Release in the Existing Notes panel of the **Notes** tab.

References Tab

The **References** tab, shown in [Figure A-9](#), contains a list of entities related to the Release. These references can be automatically generated as a Release travels through its resolution process or can be manually attached to the Release at any time. Releases with attached References will include an icon on the **References** tab.

The types of valid references are listed in [Table A-8](#).

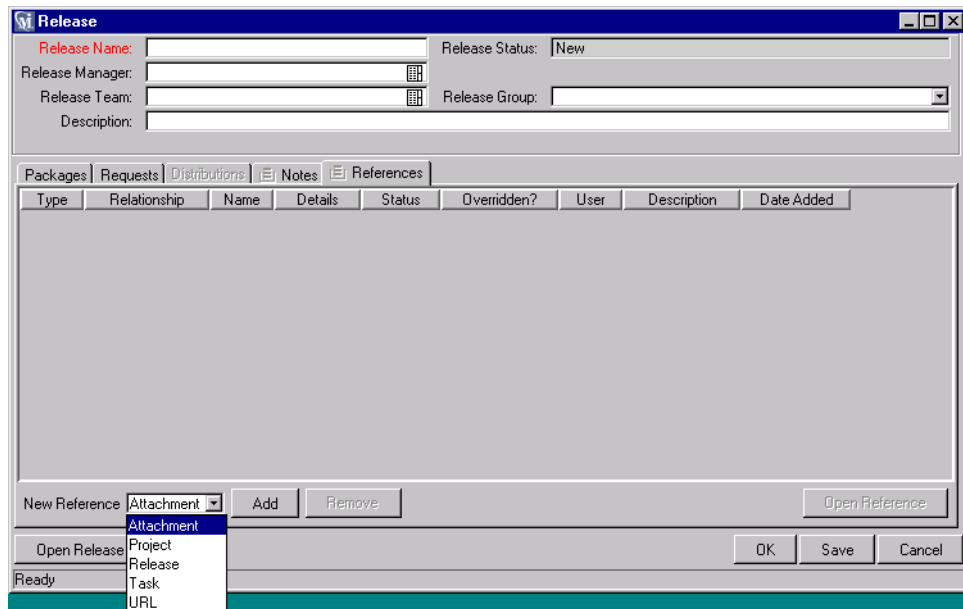


Figure A-9 References Tab

Table A-8. Valid References in the Reference Tab

Type	Description
Attachment	Attaches a file from your local machine to the current Release. The attached file is copied to the server and can then be accessed by other Change Management users. This feature is particularly helpful when you need to reference a document that is not already Web accessible.
Project	Associates a Release with a Mercury ITG Project. A Project can be “Related To” a Release.
Release	Associates a Release with another Release by referencing the secondary Release number. A Release can be “Related To” another Release. A Release can also be the “Parent” or “Child” of another Release.
Task	Associates a Release with a Project Management Task. A Task can be “Related To” a Release.

Table A-8. Valid References in the Reference Tab

Type	Description
URL	<p>References documents from a Release. These documents must be Web accessible and are attached by entering the document's Web address. Once attached, click on the Web address to open the document in your Web browser. The document must be in a format recognized by your Web browser (Word, Excel, etc.)</p> <p>Use documents to include more detailed information than what can be included in the Release Notes, such as a screen shot for an application enhancement or a report specification for a New Report Package.</p>



Note

Unlike Packages which can have blocking (predecessor or successor) references, Release references can only be informational.

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