

CA Change Manager Enterprise Workbench

User Guide

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CA Product References

This document references the following CA products:

- CA Change Manager Enterprise Workbench (CA CM Enterprise Workbench)
- CA Software Change Manager (CA SCM)
- CA Endeavor[®] Software Change Manager (CA Endeavor SCM)
- CleverPath[™] Reporter (Reporter)

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Chapter 1: Understanding CA CM Enterprise Workbench

Purpose of This Guide

This guide describes the concepts of CA CM Enterprise Workbench and provides the information you need to begin using the product.

Audience

The intended audience for this guide is anyone who needs a basic understanding of the product and how to use it.

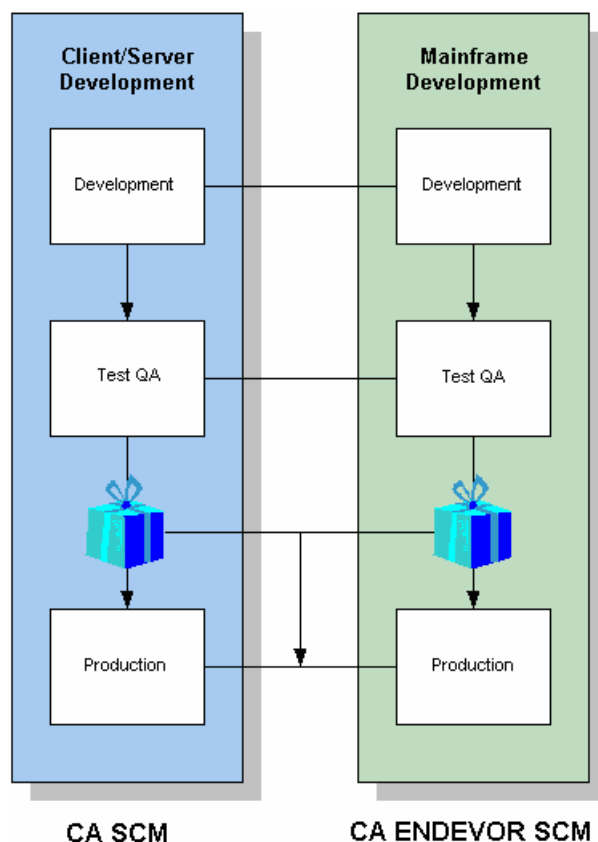
Automated Management of Enterprise-wide Applications

CA CM Enterprise Workbench is a powerful web interface that provides a streamlined and centralized way to handle application change management throughout the enterprise. It supports features such as the Enterprise package facility and simplified approval processing.

This helps organizations coordinate the complex task of integrating application change management functions across multiple platforms. Through a browser-based interface, CA Software Change Manager allows authorized users to access information about both distributed and mainframe development from anywhere in the enterprise. By using Enterprise Packages to correlate these cross-platform activities, it removes the need for time-consuming manual updates to ensure that large development projects stay in sync.

CA CM Enterprise Workbench enables Change and Configuration Management (CCM) by letting you manage and support multi-tier applications that span the enterprise, with components residing on the mainframe, local workstations, and UNIX and Linux machines. It is the software solution that automates the management of enterprise-wide applications.

CA CM Enterprise Workbench helps ensure that application components residing in CA SCM and CA Endevor SCM move through the development cycle at the same time. It synchronizes multi-platform application development by preventing an application from being promoted until all of its components are ready. This concept is illustrated in the following diagram.



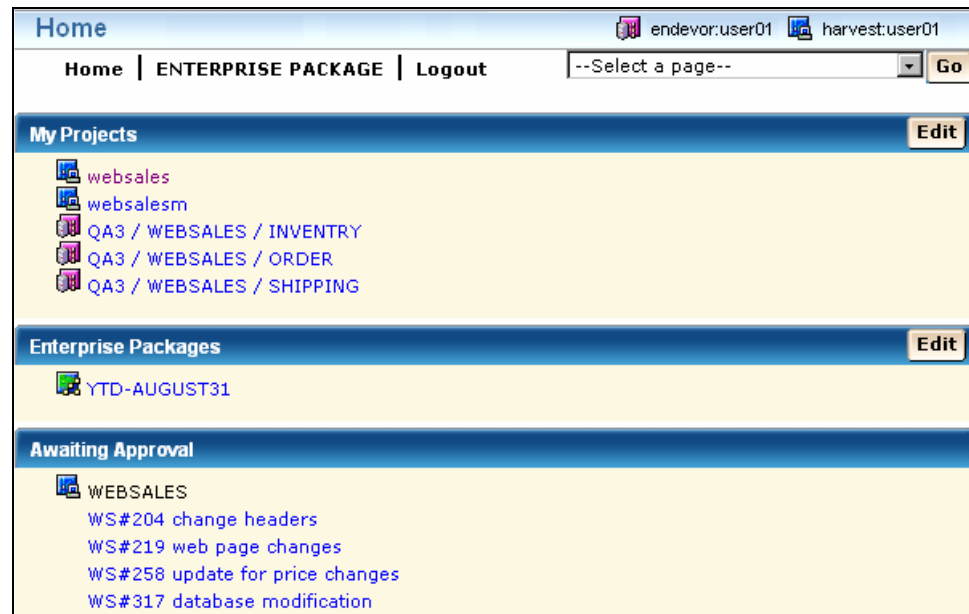
Web Interface for CA CM Enterprise Workbench

CA CM Enterprise Workbench uses the intuitive environment of the web to provide a single, consistent interface for CCM throughout the enterprise. Regardless of platform, you can access your application change management software any time, anywhere through a web browser. Using this interface, you can review the status of packages, issue approvals, and promote and demote packages throughout the enterprise.

The web interface is especially valuable to senior managers, who often need to issue approvals, but cannot access the CCM software or are not fluent in its use.

Home Page

From the CA CM Enterprise Workbench Home page, you can quickly see any CA SCM and CA Endevor SCM packages awaiting your approval, any Enterprise packages you are tracking, and the specific projects you are working on. You can customize the Home page so that it displays the projects and Enterprise packages you want.



Enterprise Package Processing

CA CM Enterprise Workbench supports synchronized promotion through the development life cycle with Enterprise package processing. An *Enterprise package* is a super-package containing multiple CA Endevor SCM packages, CA SCM packages, or both. Enterprise packages let you group related change packages and control the order in which they are processed.

By combining multiple packages into a single Enterprise package, you can associate related change packages and manage them as a single unit. This helps ensure that change packages are synchronized appropriately throughout their life cycles.

Enterprise Package Actions

Using CA CM Enterprise Workbench, you can perform the following Enterprise package actions:

- Create
- Execute
- Backout
- Backin
- Reset
- Display
- Cancel
- Delete

By customizing the CA CM Enterprise Workbench Home page, you can select the Enterprise packages that should be displayed there.

Note: For more information on Enterprise packages and the previous package actions, see the chapter “Working With Enterprise Packages.”

CA Endeavor SCM Package Management

You can manage CA Endeavor SCM packages directly through CA CM Enterprise Workbench using the following package actions:

- Create
- Modify
- Cast
- Approve or deny
- Execute
- Backout
- Backin
- Reset
- Commit
- Delete

You can perform these actions through the web-based interface. As a package proceeds through its life cycle, CA CM Enterprise Workbench displays actions that are appropriate for the package state.

For example, the CA Endevor SCM Package Details page displays an Execute button when the package status is Approved. To execute the CA Endevor SCM package, you would click Execute.

Note: For more information on CA Endevor SCM packages, see the chapter “Performing CA Endevor SCM Package Actions.”

CA SCM Package Management

You can manage CA SCM packages directly through CA CM Enterprise Workbench using the following package processes:

- Approve or Reject
- Promote
- Demote

As a package proceeds through its life cycle, CA CM Enterprise Workbench displays links that are appropriate to the package state.

The Harvest Package Detail page displays an Approve/Reject link when the package state Development (DEV) is specified as having an approval process. To approve a CA SCM package, you would click the Approve/Reject link as shown in the following illustration:

Package Information					
Project:	websales				
State:	DEV				
Name:	WS#363 document sales cycle				
Promote		Approve/Reject			
Associated Form					
Associated Version					
User	Date/Time(GMT)	Status	Version	Item	Path Name
harvest	2005-04-10 13:15:33.0	Normal	1	sales363.doc	\QAREPOS
Total Number of Versions: 1 Normal: 1 Reserved: 0 Merged: 0 Removed: 0					

Note: For more information, see the CA SCM Change Manager User Guide.

When you click Approve/Reject, the system opens the Harvest Approve/Reject Package page, as shown in the following example:

Enterprise Packages				
	Package Name	Approved	Rejected	Needed
☒	WS#363 document sales cycle	0	0	1

Enter approval/rejection comments in the space below:

Approve Package Approve Reject

My Projects List

CA CM Enterprise Workbench provides a convenient way to view your CA Endeavor SCM and CA SCM projects. On the Home page, you can create a list of the projects that you want to work on. The My Projects list is completely customizable—you select the projects that you want included in it.

Note: For more information on how to customize the My Projects area of the Home page, see the chapter “Getting Started.”

CA Endeavor SCM Project

In the CA Endeavor SCM context, a *project* is a combination of the CA Endeavor SCM environment, system, and subsystem. Projects provide a convenient way to organize elements so that you can easily view and access element information. Stages represent the life cycle of the project.

View CA Endeavor SCM Projects

From the list of projects on the Home page, you can access a series of CA Endeavor SCM project pages where you select the project, stage, and element you want to view and the display action you want to perform.

To view a CA Endeavor SCM project from the Home page

1. Click the project under the My Projects heading that you want to open.
The Details page opens and lists the stages belonging to the project.

2. Select the stage that you want to view by clicking the stage name.
The Details page opens and lists the elements belonging to the stage.
3. Select the element that you want to view by clicking the element name.
The Element Master page opens.
On the Element Master page, you can perform any of the Element or Component actions: Browse, Changes, History, and Summary.

Note: For more information on how to perform these actions, see the chapters “Performing CA Endeavor SCM File and Element Actions” and “Viewing Project Information.”

CA SCM Project

In the CA SCM context, a *project* contains the life cycle processes and data for CA SCM packages. A *life cycle* describes the path that changes take as development progresses for a project. The path is described in terms of an ordered set of phases or states. You can define a set of valid processes for each state in the life cycle. Processes are commands that perform a task. The processes defined for a state determine the activities you can perform, or the state’s scope of work.

View CA SCM Projects

From the list of projects on the Home page, you can access a series of CA SCM project pages where you can select the project, state, and package that you want to view, as well as version, approval, and package history information.

To view a CA SCM project from the Home page

1. Click the project that you want to display under the My Projects heading.
The Project page opens and lists the states belonging to the project.
2. Click the state that you want to view.
The Project page opens and lists the packages belonging to the state.
3. Click the package that you want to view.
The Package Information page opens.
4. Review the forms, versions, approvals, and history associated with the package you selected.
On the Package Detail page, you can perform package actions such as promote, approve, or reject. You can also select a user or user group ID to display more detailed information.

If the Harweb interface is enabled, you can click the Harweb Package Properties link and jump to the Package Properties page to review or update properties. For example:

Package Information					
Project:	websales		Harweb Package Properties		
State:	DEV				
Name:	WS#317 database modification				
Promote		Approve/Reject			
Associated Form					
Associated Version					
User	Date/Time(GMT)	Status	Version	Item	Path Name
harvest	2005-04-10 12:30:39.0	Normal	1	dbmod317.inn	\QAREPOS
harvest	2005-04-10 12:30:39.0	Normal	1	text317.txt	\QAREPOS
Total Number of Versions: 2 Normal: 2 Reserved: 0 Merged: 0 Removed: 0					
Package Approvals					
User/User Group	Action	Date/Time(GMT)	By		
ECCUsers	Need				

- Click the user name under the Package Approvals heading to display information about the user.

Click Done to return to the previous page.

Approval Processing

CA CM Enterprise Workbench provides convenient, easy-to-use approval facilities. The Home page lists all packages across platforms that are awaiting your approval. By selecting the package and clicking Approve, the process is completed.

Email Notification

Both CA Endevor SCM and CA SCM incorporate facilities that enable automatic email notification when packages are pending approval.

- The **Email Notification Facility** is an optional feature of CA Endevor SCM that lets you notify selected approvers when a package is ready for review.
Note: For more information on this facility, see the *CA Endevor Software Change Manager Administrator Guide*.
- The **CA SCM Mail Utility programs** hmail and spmail work with the CA SCM notify process to connect CA SCM with the system mail program.

Note: For more information on this facility, see the *CA SCM Change Manager Administrator Guide*.

Your email message can include a link to the CA CM Enterprise Workbench login page. When you click the link, the user login page opens in your web browser. After login, your Home page opens, displaying the packages awaiting review. You can complete the approval process with a few additional mouse clicks.

Enterprise Package Executor

At the heart of Enterprise package processing is the *Executor*, a program that searches the CA CM Enterprise Workbench database to locate Enterprise packages that are submitted for execution, canceled, or are ready for backout or backin. The Executor verifies that the Enterprise package status is appropriate, that it falls within the execution window, and that its *sub-packages* are in a state that enables the requested actions to be performed. After the Executor verifies that processing criteria are satisfied, it processes the package and records the results in the Enterprise Package Execution Log. The Executor also records events and actions in the History table.

Note: For more information about the Executor, see the chapter “Working With Enterprise Packages” in this guide, or the *Implementation Guide*.

Chapter 2: Getting Started

Login Page

The login page lets you log in to a CA Endeavor SCM data source (host), a CA SCM data source (broker), or both. The data sources that you use when you log in constitute an Enterprise configuration. For example, if you log in to the CA Endeavor SCM data source *endeavor* and the CA SCM data source *harvest*, this pair constitutes an Enterprise configuration.

The login pages contain the following fields and controls:

User Name

Defines the user name for the CA Endeavor SCM or CA SCM account.

Password

Defines the password for the CA Endeavor SCM or CA SCM account.

Host

Specifies the name of the CA Endeavor SCM host machine.

CA Endeavor SCM Login

Specifies whether to log in to CA Endeavor SCM.

Broker

Specifies the name of the CA SCM broker.

CA SCM Login

Specifies whether to log in to CA SCM.

Remember Login Information

Specifies whether login page entries should be remembered for future logins. Passwords are not remembered.

Log In

Logs you in to CA CM Enterprise Workbench using the information entered in the login fields.

Single Login Page

If you use the single login page, your User Name and Password must match on the CA Endeavor SCM and CA SCM systems to which you are logging in. You can log in to CA Endeavor SCM only by leaving the Broker field empty. You can log in to CA SCM only by leaving the Host field empty.

Note: CA SCM user credentials are case-sensitive; CA Endeavor SCM credentials are not.

Dual Login Page

On the dual login page, you can log in to only CA Endeavor SCM, only CA SCM, or both. User credentials do not have to match between systems.

Open the Login Page

You open the login page in a supported web browser. The URL of the login page identifies the server and path where CA CM Enterprise Workbench is running, and provides the name of the JSP login page.

Note: The URL of the login page at your site is available from your system administrator.

To open the login page in your browser

1. Enter the URL of the login page in your browser's address field.
2. Depending on how your site is configured, the layout of the login page may vary.

Note: For more information on system setup, see the *Implementation Guide*. For more information on supported web browsers, see the *Release Notes*.

Log In

You log in to CA CM Enterprise Workbench from the login page. The following procedures explain how to log in to the system using the *dual* login page.

Log In to CA Endeavor SCM Only

To log in to CA Endeavor SCM, you must be a CA Endeavor SCM user with access to the inventory on the specified host. You must also have started task authority.

During the first user login to CA Endeavor SCM, CA CM Enterprise Workbench imports the field-value default settings stored in C1DEFLT5 and ENDICNFG on the mainframe and stores them on the CA CM Enterprise Workbench server.

To log in to CA Endeavor SCM only

1. Clear the CA SCM Login check box.
2. Select the CA Endeavor SCM Login check box.
3. Enter your CA Endeavor SCM User Name, Password, and Host.

Note: In the Host field, you can use the up and down arrow keys to view the list of available hosts.

4. (Optional.) Select the Remember Login Information box to store the User Name and Host entries for future logins.
5. Click Log In.

The CA CM Enterprise Workbench Home page opens.

Note: For more information about field-value default settings, see How CA Endeavor SCM Default Values Are Refreshed in the chapter “Performing CA Endeavor SCM File and Element Actions.”

Log In to CA SCM Only

To log in to CA SCM, you must be a CA SCM user. If you are not a member of a user group whose name begins with ECCM or EW, you can view Enterprise packages, but you cannot execute actions against them. You can, however, perform actions on CA SCM packages that are not included in an Enterprise package.

To log in to CA SCM only

1. Clear the CA Endeavor SCM Login check box.
2. Select the CA SCM Login check box.
3. Enter your CA SCM User Name, Password, and Broker.

Note: In the Broker field, you can use the up and down arrow keys to view the list of available brokers.

4. (Optional.) Select the Remember Login Information box to store the User Name and Broker entries for future logins.
5. Click Log In.

The CA CM Enterprise Workbench Home page opens.

Log In to Both CA Endeavor SCM and CA SCM

The requirements mentioned in the previous sections apply.

To log in to both CA Endeavor SCM and CA SCM

1. Select the CA Endeavor SCM Login check box.
2. Select the CA SCM Login check box.
3. Enter your CA Endeavor SCM User Name, Password, and Host.
Note: In the Host field, you can use the up and down arrow keys to view the list of available hosts.
4. Enter your CA SCM User Name, Password, and Broker.
Note: In the Broker field, you can use the up and down arrow keys to view the list of available brokers.
5. (Optional.) Select the Remember Login Information check box to store the User Name, Host, and Broker entries for future logins.
6. Click Log In.

The CA CM Enterprise Workbench Home page opens.

Home Page

The CA CM Enterprise Workbench Home page includes the following page elements:

- The common menu bar
- The Locator drop-down menu
- The Workbench desktop
- —Icon identifying CA Endeavor SCM objects
- —Icon identifying CA SCM objects

Note: The information that opens on the Home page depends on your particular configuration. If this is the first time that you have logged in, My Projects and Enterprise Packages will have no entries. Awaiting Approval will contain information only if packages are awaiting your approval.

Common Menu Bar

The CA CM Enterprise Workbench menu bar opens at the top of every web page. There are three versions of this menu bar:

- Enterprise menu bar
- CA Endeavor SCM menu bar
- Harweb menu bar

Enterprise Menu Bar



The Enterprise menu bar includes the following options:

Home

Opens the CA CM Enterprise Workbench Home page.

Enterprise Package

Displays the Enterprise Package options.

List

Lists Enterprise packages.

Create

Creates an Enterprise package.

Delete

Deletes an Enterprise package.

History Search

Searches by CA Endeavor SCM packages, sub-packages, or both.

Logout

Ends your session and closes the browser window.

Note: When you finish using the system, you should log out. If you do not log out, your sessions will continue to run until the system times out.

CA Endeavor SCM Menu Bar

The CA Endeavor SCM menu bar includes the following options:

Home

Opens the CA CM Enterprise Workbench Home page.

Package

Displays the package options.

Search

Performs a CA Endevor SCM package search.

Create

Creates a CA Endevor SCM package.

File

Performs a CA Endevor SCM file search.

Element

Performs a CA Endevor SCM element search.

Logout

Ends your session and closes the browser window.

Note: When you finish using the system, you should log out. If you do not log out, your sessions will continue to run until the system times out.

Harweb Menu Bar

The CA CM Enterprise Workbench menu bar at the top of the page includes the following options:

Home

Returns to the CA CM Enterprise Workbench Home page.

Return

Returns to the last CA CM Enterprise Workbench page you visited.

Logout

Ends your session and closes the browser window.

Note: When you finish using the system, you should log out. If you do not log out, your sessions will continue to run until the system times out.

The Harweb menu bar includes the following additional options:

Project

Displays the project options: Edit Context, Context History, and Reports. When you position the cursor over this link, the options appear beneath it.

Package

Displays package options: Find Packages, My Packages, Package List, Package Group List, Create Package, and Create Package Group. When you position the cursor over this link, the options appear beneath it.

Form

Displays form options: Form List, and Find. When you position the cursor over this link, the options appear beneath it.

View

Displays view options: View Navigate, and Find Version. When you position the cursor over this link, the options appear beneath it.

File

Displays file options: File Navigate, and Edit Context. When you position the cursor over this link, the options appear beneath it.

Logout

Ends your session and closes the browser window.

Note: The options that actually appear on the Harweb menus vary according to what is available for your active context. For more information about Harweb, see the CA SCM documentation or the Harweb online help.

Locator Menu

The Locator drop-down menu provides quick access to frequently used functions of CA CM Enterprise Workbench. Options on the menu vary depending on whether you are logged in to CA Endeavor SCM, CA SCM, or both.

The Locator menu includes the following page links:

CA Endeavor SCM Element Search

Lets you specify search criteria to search for CA Endeavor SCM elements. You can also link one or more elements from your search results to an element action, and optionally link to the specified element action dialog.

CA Endeavor SCM File Search

Lets you search for files in locations where CA Endeavor SCM can access them. These locations include PDS members, the Hierarchical File Structure (HFS) file system in UNIX System Services (USS), and file systems accessible from the local client machine (local or network drives).

CA Endeavor SCM Package Create

Lets you create a new CA Endeavor SCM package.

CA Endeavor SCM Package Search

Lets you specify search criteria that return one or more CA Endeavor SCM packages.

CA Endeavor SCM Package Ship

Displays the CA Endeavor SCM Package Ship page. From this page, you can ship multiple packages at one time.

CA Endeavor SCM Release Summary Report

Opens the CA Endeavor SCM Release Summary Report page, which contains the CA Endeavor SCM dialog default values read from C1DEFLT5 and ENDICNFG for the current CA Endeavor SCM data source. From this page you can browse the report and refresh the CA Endeavor SCM default values to the most current ones for the next user who logs in to this data source.

Enterprise Package Create

Opens the Create Enterprise Package page. On this page you can specify an Enterprise package name and add comments that you want to associate with it.

Enterprise Package Delete

Opens the Delete Enterprise Packages page. Select one or more Enterprise packages by clicking the check box next to the package name. When you click Delete, these packages are removed from the system.

Enterprise Package History Search

Opens the Enterprise Package History Search page. From this page you can search for Enterprise package or sub-package history. The system displays history files of all current and previous Enterprise packages. Enterprise package history is kept even after the package has been deleted, to maintain an audit trail.

Enterprise Package List

Opens the List Enterprise Packages page. When you click an Enterprise Package name link, the Enterprise Package Detail page opens, where you can view detailed package history data.

Enterprise Reports

Opens the Enterprise Reports page. From this page you can generate and view predefined and user-defined Enterprise reports, if you installed the Reporting option. Enterprise reports contain information about the status of CA CM Enterprise Workbench objects and cross-platform reports.

Harvest Package List

If the Harweb interface is not enabled, this option opens the Search for Harvest Packages page. On the Search for Harvest Packages page, you can choose CA SCM projects and states to display a list of packages. If the Harweb interface is enabled for the current data source, this option displays the Harweb Package List for the current context. The current context is the context most recently set, either manually, or when jumping from a Harvest Package Detail page.

Harvest Web Interface

This menu option is available only if the Harweb interface is enabled. If so, selecting this option opens the Harweb My Packages page.

Project Edit

Opens the Edit My Projects page. On this page you can customize the My Projects section of the Home page by selecting all CA Endevor SCM and CA SCM projects that you want to be displayed on the Home page.

Note: If your browser does not immediately open the specified page, click the Go button.

Create a CA Endevor SCM Package

The CA Endevor SCM Package Create page lets you create an CA Endevor SCM package.

To create a package

1. Select CA Endevor SCM Package Create from the Locator drop-down list.
The CA Endevor SCM Package Create page opens.
2. Enter a new package name and description. Select a package type. Specify if this is a promotion package, backout enabled, or sharable. Enter the execution window begin and end date and Software Control Language (SCL) statements. Press Create.
The package is created and you can view it on the CA Endevor SCM Package Detail page.

Access Harweb from CA CM Enterprise Workbench

If the Harweb interface is enabled for your CA SCM data source, you can access Harweb directly from CA CM Enterprise Workbench.

To access Harweb directly from CA CM Enterprise Workbench select Harvest Web Interface from the Locator drop-down menu. The Harweb My Packages page opens. This page displays a list with all packages assigned to you, for actions in the current project or state. From this page you can take action on each package, or navigate anywhere within Harweb, if you installed that product and configured CA CM Enterprise Workbench to recognize it. All Harweb Workbench activities are available from this page.

Enterprise Desktop

The first time you log in, there are no entries under the sections My Projects or Enterprise Packages.

Your Enterprise desktop displays the following areas:

My Projects

Lists all selected CA Endevor SCM and CA SCM projects for the current Enterprise configuration. After you customize the Home page, the projects that you selected are displayed in this section.

Enterprise Packages

Lists all selected Enterprise packages for the current Enterprise configuration. An Enterprise package is one that can contain multiple CA Endevor SCM packages, CA SCM packages, or a combination of both. After you customize the Home page, the Enterprise packages that you selected are displayed in this section.

Note: Enterprise packages are automatically included on the Home page of the user who created those packages.

Awaiting Approval

Lists all CA Endevor SCM and CA SCM packages that require your approval. Clicking a package opens its Detail page, where you can approve or reject the package.

To be included in your Awaiting Approval list, a CA Endevor SCM package must have a status of In-Approval, and you must be a designated approver for the package. A CA SCM package must be in a state that has an Approval process defined for it, and you must be a user or member of a user group that approves it.

Customize My Projects

You can customize the My Projects area of the Home page to display CA Endevor SCM and CA SCM projects for the current Enterprise configuration.

To customize the My Projects area

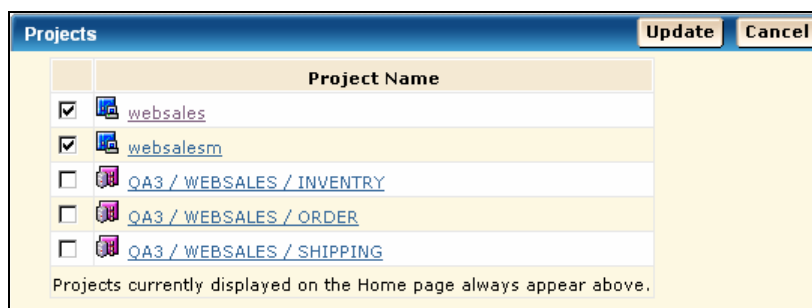
1. Click Edit on the right end of the My Projects header.

The Edit My Projects page opens. On this page you can select the CA SCM and CA Endevor SCM projects that you want to be listed under the My Projects heading on the Home page. CA SCM projects appear at the top of the page.

2. **To select CA SCM projects:** Select the check box next to each project name.

3. **To select CA Endevor SCM projects:** You must first search for CA Endevor SCM projects by entering a CA Endevor SCM Environment, System, or Subsystem. You can use wildcard characters (*). Then click Search.

The projects that meet your search criteria are displayed. For example, the following three cleared items with the CA Endevor SCM icons at their left are the results of a CA Endevor SCM project search:



Clicking a project name opens the project's CA Endevor SCM Project Information page.

4. Select the check box next to each project name that you want to appear on the Home page.
5. Click Update.

The selected projects now appear under the My Projects heading on your Home page.

Note: For more information about the CA Endevor SCM Project Information page, see the section View CA Endevor SCM Project Information in the chapter "Viewing Project Information."

Customize Enterprise Packages

You can list Enterprise packages for the current configuration on your Home page.

To customize the Enterprise Packages area

1. Click Edit on the right end of the Enterprise Packages header.
The Customize Enterprise Packages page opens, displaying Enterprise packages for the current Enterprise configuration.
2. Select the check boxes for the Enterprise packages that you want to be listed under the Enterprise Packages heading on your Home page.
3. Click Update.

The selected Enterprise packages now appear under the Enterprise Packages heading on your Home page.

Common CA CM Enterprise Workbench Features

The following sections describe features common throughout CA CM Enterprise Workbench.

Simple Navigation

Navigating through CA CM Enterprise Workbench pages is easy to do using the common menu bar and the Locator drop-down menu, which appear on every page.

Note: For more information on these features, see *Common Menu Bar and Locator Menu*.

Wildcards

Wildcards are accepted in the following fields: Environment, System, Subsystem, Element, and Type.

On the Retrieve Element tab of the CA Endeavor SCM Element Actions page, wildcards (*) and placeholder characters (%) are accepted in the Name and Member fields.

On the CA Endeavor SCM File Search page, you can use wildcards or placeholders in the Member or Through fields alone or as trailing or leading characters.

Note: For more information on using wildcards in the Environment field of the CA Endeavor SCM Element Search page, see ENDEVOR Tab in the chapter "Performing CA Endeavor SCM Element Actions."

Persistence

For your convenience and ease of use, text you previously entered in page fields persists from one session to the next. The default and maximum number of saved entries for each field is 10 values. You can scroll through the list of saved values by using the up and down arrow keys. Radio button and check box settings on dialog boxes are preserved only during the current session.

USS and Long Name Support

Long name support enables you to enter and display long file names through the web interface. Element names can be up to 255 characters long and in mixed case. File names can be mixed case, too. You can conduct case-sensitive searches for elements and files.

Long name support applies to the following actions: Add, Update, Retrieve, Move, Delete, Generate, Signin, and Transfer.

Note: For more information on long name support, see the chapter “Performing CA Endeavor SCM File and Element Actions” in this guide, and the *CA Endeavor SCM Change Manager Administrator Guide*.

Element Naming Considerations

Keep the following considerations in mind when naming elements:

- You can add data set name (DSN) members (PDS, PDSE, ELIB, Panvalet, or Librarian) to CA Endeavor SCM. The element name can be the same or different from the member name.
- You can add HFS files to CA Endeavor SCM. The element name can be the same or different from the HFS file name.
- You can add files accessible from a local workstation to CA Endeavor SCM. The element name can be the same or different from the local file name.
- You can also retrieve elements to a DSN, HFS, or local directory. The member name or file name of the retrieved element can be the same or different from the element name.
- The element name determines the file structure (DSN or HFS) that the element can be added from or retrieved to.

Note: For additional information about naming conventions, see the chapter “Performing CA Endeavor SCM File and Element Actions.”

How CA Endeavor SCM Default Values Are Refreshed

During the first user login to CA Endeavor SCM, CA CM Enterprise Workbench imports the field-value default settings stored in C1DEFLT5 and ENDICNFG on the mainframe and stores them on the CA CM Enterprise Workbench server. These settings are used in the CA Endeavor SCM action and search dialogs in CA CM Enterprise Workbench for that CA Endeavor SCM data source.

CA CM Enterprise Workbench reads these settings from the CA CM Enterprise Workbench server each time you log in. If you change your copy of the default values during a CA CM Enterprise Workbench session, your changes persist only for that session (they are discarded at logout). At the beginning of a new session (the next time you log in), the default values are re-read and reset from the CA CM Enterprise Workbench server.

Default settings read from the CA CM Enterprise Workbench server are displayed in the CA Endeavor SCM Release Summary report. You can browse this report during any CA CM Enterprise Workbench session. Clicking the Refresh button re-reads the field-value default settings from the mainframe and writes a new copy on the CA CM Enterprise Workbench server. After you click Refresh, the report is redisplayed with a message indicating the default values that will be used when the next user logs in to this data source. If you have changed your copy of the default values since you logged on to CA CM Enterprise Workbench, these values persist until your next login, when the latest copy of defaults is read from the CA CM Enterprise Workbench server.

During any session, you can browse the report and refresh the default settings for the current data source. The next user to log in to the data source will see the refreshed settings.

Refresh CA Endeavor SCM Default Values

Use the Refresh button on the CA Endeavor SCM Release Summary Report page to refresh CA Endeavor SCM default option values. The Release Summary Report is available on the Locator menu if you are an authorized CA Endeavor SCM user.

To refresh CA Endeavor SCM default values

1. Select CA Endeavor SCM Release Summary from the Locator menu.

The CA Endeavor SCM Release Summary Report page opens.

2. Browse the report to review the stored settings, if desired.
3. Click Refresh.

The CA Endeavor SCM Release Summary Report is redisplayed with a confirmation message at the top of the page, similar to the following:
"Default values in dialog fields will revert back to those shown in the report during the next login to this data source."

The following illustration shows an example of the CA Endeavor SCM Release Summary Report:

----- Options -----		
Site ID.....0	Access Tbl.....	ACM.....Y
Release.....B7000C	SMF Record Number.222	DB2.....N
Environments.....6	Library System....PV	QuickEdit.Y
Userid Start....1	Librarian Program.LIBRARV	ELINK.....Y
Userid Length....7	VIO Unit Name.....VIO	ESI.....N
Batch ID.....1	Work Unit Name....SYSDA	INFO.....N
SPFEDIT QNAME....SPFEDIT	Work VOLSER.....	LIBENV....Y
SYSIEWL QNAME....SYSIEWLP	Lines Per Page....60	NETMAN....N
Authorized TBLs..REQUIRED	MODHLI.....	PDM.....Y
Gen-In-Place SO..Y	Signout on Fetch..Y	PROC.....Y
CA-Lserv SUBSYS..		
PITR Journal Grp.		
Site Symbol Tbl..ESYMBOLS		
----- Package Processing Options -----		
Approval Req'd...Y	CAST Security....Y	Security..ESI
Foreground Exec..Y	Comp Validation...0	
Generated High-lvl Index for Remote PKG JCL.....		
----- Control Data sets -----		
Element Catalog.....	BST.PERM40QA.ELMCATL	
Package Control File.....	BST.PERM40QA.PACKAGE	
Endeavor Macro Library.....	BST.QAR7P2.SOURCE	
CCID Validation Data Set.....	BST.QA40EW11.VALCCID	
ACM Query Root Data Set.....	BST.PERM40QA.ACMROOT	

Error Reports

Failed actions generate execution reports. For example, an unsuccessful Add CA Endeavor SCM Element action may generate a page similar to the following:

Element Action Result				test102:SYSTM01	
Home		PACKAGE	File	Element	Logout
				--Select a page--	Go
Element Action Execution(dsn)					
Member	Return Code	Reason Code	Message		
ADDTEST0012		0000	THE ELEMENT WAS ALREADY PRESENT AT S1 View Action Report		
Endevor - Add Failed					
Click here to continue.					

When you click the View Action Report link, a report similar to the following opens, indicating the cause of the failure.

```

E N D E V O R   A P I   E X E C U T I O N   R E P O R T                               RELEASE 7.0  SERIAL B7000C

16:07:44  API0101I  BEGINNING OF API ACTION PROCESSING
API0100I
API0100I  ADD ELEMENT: CNA101
API0100I      MESSAGE DDNAME: APIMSGS
API0100I      FROM      DSNAME: BST.ABCDEF.SRCLIB
API0100I      MEMBER: ADDTEST
API0100I      TO      ENVIRONMENT: QA2
API0100I      SYSTEM: WEBSALES
API0100I      SUBSYSTEM: INVENTORY
API0100I      TYPE: COPYBOOK
API0100I      OPTIONS
API0100I          UPDATE IF PRESENT: N
API0100I          DELETE INPUT SOURCE: N
API0100I          OVERRIDE SIGNOUT: N
API0100I          BYPASS GENERATE PROCESSOR: N
API0100I
API0100I  API ACTION REQUEST DATA SUCCESSFULLY PRINTED
API0100I
16:07:44  C1Y0015I  STARTING PARSE OF REQUEST CARDS

```

Error Detected Messages

In some cases, you may receive an Error Detected message. Click the Error Detected link to see a Return Code and Reason Code explaining the cause of the error.

If you ignore the link and move on to another process, the detected error explanation disappears. This also occurs if you refresh the page.

Note: For more information on CA Endeavor SCM API error messages, see the appendix "Local File System API Error Messages."

Chapter 3: Performing CA Endeavor SCM Element Actions

Basic CA Endeavor SCM Actions

You can perform typical CA Endeavor SCM file and element actions using CA CM Enterprise Workbench. These activities include using the search tools, adding and updating files, retrieving and updating elements, and moving elements through their life cycle. Use this chapter in conjunction with the *CA Endeavor SCM Change Manager User Guide*.

Search Tools

The CA Endeavor SCM Element Search and CA Endeavor SCM File Search tools enable you to view lists of elements, files, or members. These tools are accessible from the Locator drop-down menu, which you can find in the upper right of your screen.

After locating an element, you can select an element action to perform on the element. You can also switch between File and Element search pages from the common menu bar when you are on a search page.

File Operations

Use the CA Endeavor SCM File Search page to search for files in the following locations:

- DSN data set members
- HFS files systems
- Directories local to your client machine

You can then add or update these files in the CA Endeavor SCM system.

DSN File Operations

Using CA CM Enterprise Workbench, you can search for files in locations where CA Endeavor SCM can access them. You can search PDS members and then perform Add or Update actions on them.

Search Data Set Members

You can search members in a PDS, PDS/E, Elib, Librarian or Panvalet data set.

To search data set members

1. Click the Locator drop-down menu and select CA Endeavor SCM File Search.
The CA Endeavor SCM File Search page opens.

2. Click the DSN tab.

3. Enter the Data Set Name.

Note: Lowercase is changed to uppercase.

4. Enter a specific Member name, or Member and Through Member names to search for a range of names.

Note: Each field is limited to 10 characters. You can enter one or more characters in the Member or Through fields, followed by a wildcard (*) or placeholder (%). You can also use the up or down arrow keys on the keyboard to scroll through entries previously made in these fields.

5. Click Search.

The page displays the search results displayed, as shown in the following example.

From this display you can perform the CA Endevor SCM Add, Update, or Search Again actions listed at the top of the Result section. You can also browse the file locally on your machine by clicking the file name, or open the Element Master display by clicking the Element name, if shown.

Result

ACTION: Add | Update | Search Again

Result: 12 members from Data Set BST.WEBTEST.PDS

☐	Member	Environment	System	Subsystem	Stage	Element	Type	Ver.Level	Date Time
☐	SXCPY11	QA2	WEBSALES	INVENTORY	1	SXCPY11	COPYBOOK	01.00	05MAY05 09:25
☐	SXCPY12	QA2	WEBSALES	INVENTORY	1	SXCPY12	COPYBOOK	01.00	05MAY05 09:25
☐	SXCPY13	QA2	WEBSALES	INVENTORY	1	SXCPY13	COPYBOOK	01.00	05MAY05 09:25
☐	SXCPY14	QA2	WEBSALES	INVENTORY	1	SXCPY14	COPYBOOK	01.00	05MAY05 09:25
☐	SXCPY15	QA2	WEBSALES	INVENTORY	1	SXCPY15	COPYBOOK	01.00	05MAY05 09:25
☐	SXCPY16	QA2	WEBSALES	INVENTORY	1	SXCPY16	COPYBOOK	01.00	05MAY05 09:25
☐	SXCPY17	QA2	WEBSALES	INVENTORY	1	SXCPY17	COPYBOOK	01.00	05MAY05 09:25
☐	SXCPY18	QA2	WEBSALES	INVENTORY	1	SXCPY18	COPYBOOK	01.00	05MAY05 09:25
☐	SXDTBL1	QA2	WEBSALES	INVENTORY	1	SXDTBL1	DB2TBL	01.00	05MAY05 09:25
☐	SXDTBL2	QA2	WEBSALES	INVENTORY	1	SXDTBL2	DB2TBL	01.00	05MAY05 09:25
☐	SXDTBL3	QA2	WEBSALES	INVENTORY	1	SXDTBL3	DB2TBL	01.00	05MAY05 09:25
☐	SXDTBL4	QA2	WEBSALES	INVENTORY	1	SXDTBL4	DB2TBL	01.00	05MAY05 09:25

Add Tab

You add members or files using the Add tab on the CA Endevor SCM Element Action page. The following is an example of the Add tab for data set members.

Options		Execute
Add Update		
Add Options:		
Comment	CCID	
To: Environment	Generate Element ☒	
System	Delete Input Source ☐	
Subsystem	Override Signout ☐	
Element	Processor Group	
Type		
New Version	Update If Present ☐	
☒ Data Set Member List		
☒ BST.WEBTEST.PDS(SXCPY11)		
☒ BST.WEBTEST.PDS(SXDTBL1)		

The Add tab contains the following fields:

Comment

Defines a comment, up to 40 characters.

To: Environment

Specifies the Environment to which the members or files will be added.

System

Specifies the system to which the members or files will be added.

Subsystem

Specifies the subsystem to which the members or files will be added.

Element

Specifies the element to which the members or files will be added.

Type

Specifies the type that will be added.

CCID

Specifies a Change Control Identifier, which lets you relate a CCID to an action, or one activity to another. For example, if you have several files related to one problem, you can assign each one the same CCID.

Generate Element

Specifies if CA Endevor SCM should read the TYPE definition for the element and execute the specified generate processor.

Delete Input Source

Specifies if CA Endevor SCM should delete the indicated member from the data set or file from the file system.

Override Signout

Specifies that the element should be updated if it is signed out to a person other than yourself.

Processor Group

Specifies the processor group to use. CA Endevor SCM executes the generate processor in this group, if one is specified. After the generate processor runs for the element, CA Endevor SCM updates the information in the Master Control File.

New Version

Specifies that a new version of an element should be created using the version number that you specify.

Update if Present

Specifies that, if an element with the indicated name already exists, it should be updated.

Add Members

Adding members puts them under CA Endevor SCM control. You can add a single member or multiple members.

To add members

1. Perform the search procedure in Search Data Set Members.

Members are listed in the Result area.

2. Select the members you want by checking their boxes.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed members.

3. Click the Add link at the top of the Result area.

The Options area opens with the Add tab displayed by default.

4. Enter the required information in the target Environment, System, Subsystem, Element name, and Type fields.
5. Configure the remaining optional data fields.
6. Click Execute.

When processing is complete, the CA Endevor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endevor SCM - Add Successful message displays with the link to Action Report.
- **If the action failed**, the CA Endevor SCM- Add Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter "Getting Started." For more information on element naming standards, see the *CA Endevor SCM Change Manager Administrator Guide*.

Update Tab

You update members or files using the Update tab on the CA Endeavor SCM Element Action page. The following is an example of the Update tab for HFS.

Options Execute

Add **Update**

Update Options:

Comment CCID

To: Environment Generate Element ☒

System Delete Input Source ☐

Subsystem Override Signout ☐

Element Processor Group

Type

File List	
☒	/u/users/endeavor/qa40/perm/base1/EVWGDGAD
☒	/u/users/endeavor/qa40/perm/base1/EVWGHBE2
☒	/u/users/endeavor/qa40/perm/base1/EVWGIFJG

The Update tab contains the following fields:

Comment

Defines a comment, up to 40 characters.

To: Environment

Specifies the Environment that the members or files will update.

System

Specifies the system that the members or files will update.

Subsystem

Specifies the subsystem that the members or files will update.

Element

Specifies the element that the members or files will update.

Type

Specifies the type that the members or files will update.

CCID

Specifies a Change Control Identifier, which lets you relate a CCID to an action, or one activity to another. For example, if you have several files related to one problem, you can assign each one the same CCID.

Generate Element

Specifies if CA Endevor SCM should read the TYPE definition for the element and execute the specified generate processor.

Delete Input Source

Specifies that, if the Update operation completes without error, CA Endevor SCM should delete the indicated member from the data set or file from the file system.

Override Signout

Specifies that the element should be updated if it is signed out to a person other than yourself.

Processor Group

Specifies the processor group to use. CA Endevor SCM executes the generate processor in this group, if one is specified. After the generate processor runs for the element, CA Endevor SCM updates the information in the Master Control File.

Update Members

You can update only those members in the entry stage of an environment, thereby creating a new level for the element in that stage. A new level is created if changes exist between the new and existing versions.

To update members

1. Perform the search procedure in Search Data Set Members.
Members are listed in the Result area.
2. Select the members you want by checking their boxes.
Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed members.
3. Click the Update link at the top of the page.
The Options area opens with the Update tab displayed by default.
4. Enter the required information in the target Environment, System, Subsystem, Element name, and Type fields.
5. Configure the remaining optional data fields.
6. Click Execute.
When processing is complete, the CA Endevor SCM Element Action Result page opens.
 - **If the action succeeded**, the CA Endevor SCM - Update Successful message displays with the link to View Action Report.

- **If the action failed**, the CA Endeavor SCM- Update Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.” For more information on element naming standards, see the *CA Endeavor SCM Change Manager Administrator Guide*.

HFS File Operations

With CA CM Enterprise Workbench, you can search for files in locations where CA Endeavor SCM can access them. You can search for long-named files in the HFS file system in USS and then perform Add or Update actions on them.

Search HFS

You can search for long-named files in HFS file systems.

To search for files in a HFS file system

1. Click the Locator drop-down menu and select CA Endeavor SCM File Search.

The CA Endeavor SCM File Search page opens.

2. Click the HFS tab.
3. Enter the file Path.

Note: The maximum path length is 768 characters.

4. Enter a specific File name, or File name and Through file name to search for a range of files. The maximum number of characters you can enter in each field is 255.

Note: You can enter one or more characters in the File or Through fields, followed by a wildcard (*) or placeholder (%). You can also use the up or down arrow keys on the keyboard to scroll through entries previously made in these fields.

5. Click Search.

The page displays the search results.

From this list you can perform the CA Endeavor SCM Add, Update, or Search Again actions listed at the top of the Result area. You can also browse the file locally on your machine by clicking the file name, or open the Element Master display by clicking the Element name, if shown.

Result									
ACTION: Add Update Search Again									
Result: 9 files from Directory /u/users/endeavor/qa40/perm/base1/									
	File	Environment	System	Subsystem	Stage	Element	Type	Ver.Level	Date Time
☐	EVWGDGAD	QA2	WEBSALES	TAXES	1	EVWB8ASC	BINWORD	01.00	14APR05 09:29
☐	EVWGHBE2	QA2	WEBSALES	TAXES	1	EVWGHBD5	LOCALEXT	01.00	14APR05 09:56
☐	EVWGIFJG	QA2	WEBSALES	TAXES	1	EVWGIFH6	LOCALEXT	01.01	14APR05 10:21
☐	EVWH442Z	QA2	WEBSALES	TAXES	1	EVWH440P	LOCALEXT	01.02	14APR05 17:33
☐	EVWLZ4KJ	QA2	WEBSALES	TAXES	1	EVWLZ4IP	LOCNOEXT	01.00	15APR05 09:41
☐	EVWNEJ3H	QA2	WEBSALES	TAXES	1	EVWNEJ1U	LOCNOEXT	05.02	18APR05 10:29
☐	EVW9GEXR	QA2	WEBSALES	TAXES	1	LAB123	LOCALEXT	01.00	19APR05 14:31
☐	EVW9I6ZV	QA2	WEBSALES	TAXES	1	LAB123	LOCNOEXT	01.00	19APR05 14:51
☐	EVW9SGMM	QA2	WEBSALES	TAXES	1	I4106401	LOCALEXT	01.00	10JAN05 17:44

Add HFS Files

Adding files to CA Endeavor SCM from an HFS file system in USS puts them under CA Endeavor SCM control. You can add a single file or multiple files.

To add files from an HFS file system

1. Perform the search procedure in Search HFS.

Files are listed in the Result area.

2. Select the files you want by checking their boxes.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed files.

3. Click the Add link at the top of the Result area.

The Options area opens with the Add tab displayed by default. For more information, see Add Tab.

4. Enter the required information in the element's target Environment, System, Subsystem, Element name, and Type fields.

Note: If you are adding a single file from the HFS file system to CA Endeavor SCM, you can rename the file by entering a new name in the Element field. If you are adding more than one file, the files retain their original names when added to CA Endeavor SCM.

5. Configure the remaining optional data fields, including New Version and Update if Present.

For more information, see Add Tab.

6. Click Execute.

When processing is complete, the CA Endeavor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endeavor SCM - Add Successful message displays with the link to View Action Report.

- **If the action failed**, the CA Endeavor SCM- Add Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.” For more information on element naming standards, see the *CA Endeavor SCM Change Manager Administrator Guide*.

Update HFS Files

Updating files lets you update only those files in the entry stage of an environment, thereby creating a new level for the element in that stage. A new level is created if changes exist between the new and existing versions.

To update HFS files

1. Perform the search procedure in Search HFS.
Files are listed in the Result area.
2. Select the files you want by checking their boxes.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Update link at the top of the page.
The Options area opens with the Update tab displayed by default.
4. Enter the required information in the element’s target Environment, System, Subsystem, Element name, and Type fields.
5. Configure the remaining optional data fields.
6. Click Execute.

When processing is complete, the CA Endeavor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endeavor SCM - Update Successful message displays with the link to View Action Report.
- **If the action failed**, the CA Endeavor SCM- Update Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.” For more information on element naming standards, see the *CA Endevor SCM Change Manager Administrator Guide*.

Local Directory File Operations

With CA CM Enterprise Workbench, you can search for files accessible from the local machine (local or network drives) and then perform Add or Update actions on them. See the following sections for specific procedures.

More information:

For more information on transferring files to and from local directories, see Local Directory File or Element Transfer.

Install J2RE

The first time you open the Directory tab on the CA Endevor SCM File Search page or the Retrieve tab on the CA Endevor SCM Element Search page, you may be prompted to install the plug-in for J2RE. This process usually begins with a lengthy load of the Directory tab of the CA Endevor SCM File Search page.

Notes:

- If you are using a Mozilla browser, an icon appears on the Directory tab prompting you to click on it to get the plug-in. Clicking the icon displays another dialog from which you can download the J2RE plug-in to the desktop and install it. After installation is complete, click the icon again to proceed with the local directory operation.
- The following J2RE installation dialog appears automatically if you are using Internet Explorer.

Important! Consult the Release Notes for further information on known issues with J2RE installation.

To install J2RE

1. Click Yes or Install when one of the Security Warning dialogs appears.
2. Accept the license agreement and click Next>.
The J2RE wizard starts.
3. On the Setup Type panel, select Typical Setup, and click Next>.
The software is installed.
4. Click Finish to complete the installation.

5. Log out of CA CM Enterprise Workbench and restart the browser.
The following security warning may appear:
6. Take one of the following actions:
 - Select **Yes** if you want to grant security permission to the applet for one session only (the security warning will reappear in your next session if you access the directory search facility).
 - Select **No** if you do not want to grant security permission to the applet (you will not be able to use the directory search facility).
 - Select **Always** if you will use this option regularly and you want to grant permanent security permission. You will not be prompted with this security warning again. We recommend that you select Always.

Search for Local Files

Note: Access to the Directory search tab is a site-level configurable option in the ew.cfg file (WebUI.FileSearchLocalDirectoryTab). This option is disabled by default.

To search for files accessible on or from the local machine

1. Click the Locator drop-down menu and select CA Endevor SCM File Search.
The CA Endevor SCM File Search page opens.
2. Click the Directory tab.

Note: The first time you use this tab, you are prompted to download the Java 2 Runtime Environment plug-in. For further instructions, see First-time Local Directory Search (J2RE Installation).

The File Chooser appears.
3. Browse for files using the Look in drop-down list at the top of the tab.

Note: You can select more than one file, but files must be in the same directory and of the same file type. Hold down the Ctrl key and click to select multiple files. The selected files appear in the File name field.
4. Click Add to list the files in the Result area.
In the Result display, all files you selected in the dialog are checked.
5. Deselect any files you don't want. Then select the CA Endevor SCM Add, Update, or Search Again action listed at the top of the Result area.

Add Local Files

Adding files to CA Endevor SCM from a local file system puts them under CA Endevor SCM control. You can add a single file or multiple files.

To add files

1. Perform the search procedure in Search for Local Files.

Files are listed in the Result area.

2. Select the files you want by checking their boxes.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Add link at the top of the Result area.

The Options area opens with the Add tab displayed by default. For more information, see Add Tab.

4. Enter the required information in the element's target Environment, System, Subsystem, Element name, and Type fields.

Note: The TYPE definition limits the name you can specify when adding a PDS member. Names can be alphanumeric, 1– 255 characters, mixed case, and include the following characters: period, hyphen, and underscore. For example:

AB4FG
abc3eFg.h-j_k

Note: If you are adding a single file from the local file system to CA Endeavor SCM, you can rename the file by entering a new name in the Element field. If you are adding more than one file, the files retain their original names when added to CA Endeavor SCM.

5. Configure the remaining optional data fields.
6. Click Execute.

Note: If you are adding files from the client machine, the system performs validations in addition to CA Endeavor SCM processing, including pre-processing and post-processing.

The progress bar indicates the progress of the file upload from the client machine to the CA CM Enterprise Workbench server. If you click Cancel during the transfer, the Add operation stops, and the files are not added to CA Endeavor SCM. Once the transfer is complete (100%), the file upload cannot be canceled.

When processing completes, the CA Endeavor SCM Element Action Result page appears.

- **If the action succeeded**, the CA Endeavor SCM - Add Successful message displays with the link to View Action Report.
- **If the action failed**, the CA Endeavor SCM- Add Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.” For more information on error messages, see the appendix “Local File System API Error Messages.”

Update Local Files

You can update files in the entry stage of an environment, thereby creating a new level for the element in that stage. A new level is created if changes exist between the new and existing versions.

To update files

1. Perform the search procedure in Search for Local Files.

Files are listed in the Result area.

2. Select the files you want by checking their boxes.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Update link at the top of the page.

The Options area opens with the Update tab displayed by default. For more information, see Update Tab.

4. Enter the required information in the element’s target Environment, System, Subsystem, Element name, and Type fields.

Note: The TYPE definition limits the name you can specify when adding a PDS member. Names can be alphanumeric, 1– 255 characters, mixed case, and include the following characters: period, hyphen, and underscore. For example:

AB4FG
abc3eFg.h-j_k

Note: If you are updating a single file from the local file system to CA Endevor SCM, you can rename the file by entering a new name in the Element field. If you are updating more than one file, the files retain their original names when updated in CA Endevor SCM.

5. Configure the remaining optional data fields.
6. Click Execute.

Note: If you are updating files from the client machine, validations in addition to CA Endevor SCM processing are performed, including pre-processing and post-processing.

The progress bar indicates the progress of the file update from the client machine to the CA CM Enterprise Workbench server. If you click Cancel during the transfer, the Update operation is stopped, and the files are not updated in CA Endevor SCM. After the transfer is complete (100%), the file update cannot be canceled.

When processing completes, the CA Endeavor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endeavor SCM - Update Successful message displays with a link to the Action Report.
- **If the action failed**, the CA Endeavor SCM - Update Failed message displays, along with the return code, reason code, message, and a link to the Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.” For more information on error messages, see the appendix, “Local File System API Error Messages.”

Element Operations

Use the CA Endeavor SCM Element Search page to search for elements in various locations. You can then perform CA Endeavor SCM element actions on them. For information on these element operations, see the following procedures.

Element Searches

When you search for an CA Endeavor SCM element, you list elements by their location. You use the ENDEVOR tab on the CA Endeavor SCM Element Search page to enter criteria for element searches.

ENDEVOR Tab

The ENDEVOR tab lets you enter search criteria to find elements.

The screenshot shows a web interface for searching CA Endeavor SCM elements. The 'ENDEVOR' tab is active. Below the tab title is a 'Location' section. It contains several input fields and a checkbox. The fields are: Environment, System, Subsystem, Stage Type, Element, Through, Where CCID of (Current), equals, Where Processor Group, equals, and a checkbox labeled 'Build Element List Using Map'.

This tab contains the following fields:

Environment

(Required.) Specifies the Environment name. You cannot leave this field empty, but you may use wildcards (*) or placeholders (%) or a combination of both. Examples of valid non-explicit environment names include *, QA*, and W%BSEN*.

If you specify an explicit environment name (no wildcards), you can select the Build Element List Using Map check box, which performs a logical search. If you specify a non-explicit environment name including one or more wildcards, CA Endevor SCM performs a physical search and the Build Element List Using Map check box is disabled.

More information:

For more information about how physical and logical searches affect the Generate action and Copy Back option, see Generate Tab.

System

Specifies the system name.

Subsystem

Specifies the subsystem name.

Stage

Specifies the stage identifier.

Type

Specifies the element type.

Element

Specifies an explicit element name or a name with a mask (*) or placeholders (%).

Through

Specifies an explicit Through element name. You also can use a name mask (an * alone or at the end of the partial element name) or one or more placeholders (a % in the element name). You can also combine % and * in the Through member name.

Where CCID of _____ equals

Specifies a CCID to limit the selection list to only those elements whose last CCID matches the specified CCID.

The CCID you specify here can match the one in any of the following sections of the element's Master Control File. This includes Last Element Modification, Current Source, or Generate.

Current

Specifies that CA Endevor SCM should look through the CCID fields in the Master Control File to find a specified CCID. This is the default.

Retrieve

Specifies that CA Endeavor SCM should use the CCID in the RETRIEVE CCID field of the Master Control File.

Where Processor Group Equals

Specifies a processor group to limit the selection list to only those elements to which the processor group has been assigned.

Build Element List Using Map

Specifies whether you want CA Endeavor SCM to search the map when building a list of elements, starting at the specified location.

Note: If you use wildcards (*) or placeholders (%) in the Environment field, the Build Element List Using Map option is disabled.

Search for Elements

There are two ways to search for elements:

- Starting with the CA Endeavor SCM Element Search page to enter all search criteria
- Selecting an CA Endeavor SCM project in the My Projects area of your home page

To search for an element by entering search criteria

1. Select CA Endeavor SCM Element Search from the Locator menu.

The CA Endeavor SCM Element Search page opens, displaying the ENDEVOR tab.

2. Enter the location data you want to search on.

Note: Elements can be up to 255 characters in length. You can use wildcards (*) or placeholders (%) in any of the fields.

3. Click Search.

Note: If you specified a non-explicit environment search (used one or more wildcards or placeholders in the Environment and Element fields), a message dialog opens, warning that the search may be lengthy. To specify an explicit environment name, click Cancel. To proceed with the non-explicit search, click OK.

The search results lists the elements that meet your search criteria. An example follows.

Result								
ACTION: Retrieve Move Delete Signin Generate Transfer Search Again								
Result: 475 elements								
☒	Element Name	Type	Environment	Stage	System	Subsystem	Ver.Level	Current Date
☐	FINAPP06	COBOL	QA2	C	WEBSALES	INVENTORY	01.00	12FEB05
☐	FINHDR1	COPYBOOK	QA2	C	WEBSALES	INVENTORY	01.00	12FEB05
☐	FINPAG1	COPYBOOK	QA2	C	WEBSALES	INVENTORY	01.00	12FEB05

From the results list, after you select elements by activating their check boxes, you can perform any of the actions listed at the top of the page: Retrieve, Move, Delete, Signin, Generate, Transfer, or Search Again. For more information on these element actions, see the sections that follow.

To search for an element starting in a particular CA Endeavor SCM project

1. Click an CA Endeavor SCM project listed in the My Projects section of the CA CM Enterprise Workbench Home page.

The CA Endeavor SCM Project Information page appears.

The Details area displays environment, system, subsystem, and stage information for the selected project.

- Specify filter criteria, if desired, and then click an environment link.

The CA Endevor SCM Element Search page opens. The Result area lists the elements for your selected environment, system, subsystem, and stage. If you entered filter criteria on the CA Endevor SCM Project Information page, location information and the filter criteria are shown on the ENDEVOR tab under the Search section. For example:

Result

ACTION: Retrieve | Move | Delete | Signin | Generate | Transfer | Search Again

Result: 6 elements

☐	Element Name	Type	Environment	Stage	System	Subsystem	Ver.Level	Current Date
☐	FINAPP06	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMA	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMB	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMC	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMD	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGME	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05

Search

ENDEVOR

Location

Environment System Subsystem Stage Type

Element Through

Where CCID of equals

Where Processor Group equals

☒ Build Element List Using Map

If you want to change or refine your search, edit the information on the ENDEVOR tab and click Search. The Result list is updated.

From the results list, after you select elements by activating their check boxes, you can perform any of the actions listed at the top of the page: Retrieve, Move, Delete, Signin, Generate, Transfer, or Search Again. For more information on these element actions, see the following sections.

Retrieve Tab

You retrieve elements using the Retrieve tab.

The screenshot shows a software interface titled "Options" with a tabbed menu. The "Retrieve" tab is selected. Below the tabs, there is a section labeled "Retrieve Options:". This section contains several input fields and checkboxes. At the top, there are "Comment" and "CCID" text boxes. Below them are "Version" and "Level" text boxes. There are three radio buttons: "To: DSN" (selected), "To: HFS", and "To: Local Directory". To the right of the "To: DSN" radio button are four checkboxes: "Signout Element" (checked), "Override Signout" (unchecked), "Expand Includes" (unchecked), and "Replace Member" (unchecked). There are also text boxes for "Member" and "Name" associated with the "To: DSN" and "To: Local Directory" options respectively. An "Execute" button is located in the top right corner of the dialog.

This tab contains the following fields:

Comment

Specifies a comment, up to 40 characters.

Version

Specifies the CA Endeavor SCM version of this element, 01–99. If you do not specify a version, the current or highest version is retrieved.

Level

Specifies the CA Endeavor SCM level of this element, 00–99. If you do not specify a level, the current or highest level is retrieved.

- **For text elements:** You can review the change history from the CA Endeavor SCM Element Master page to determine which version and level to retrieve.
- **For binary elements:** You can see only the current version and level on the CA Endeavor SCM Element Master page.

To: DSN and Member

Specifies that the element should be retrieved to a data set. The DSN field specifies the mandatory destination data set name. The Member field optionally specifies the DSN member name where the element will be retrieved. Be aware of the following naming conventions:

- **If one element is retrieved:** The Member parameter is used to build the member name of the element retrieved in the DSN. Naming syntax obeys the rules specific for this DSN, and some extended PDSs support long names.

If you leave the Member field empty, the member name is built using the element name. For example, if you specify a Member name of COB0001, the CA Endeavor SCM element MYCOBOL is stored in the member COB0001. If you leave the Member field empty, the member is named MYCOBOL.

- **If more than one element is selected:** The Member value is ignored, and the members are named the same as the element names.

For example, element ABC is retrieved into the member named ABC; element CED is retrieved into the member CED.

To: HFS and Name

Specifies that the element should be retrieved to an HFS file system. Enter the mandatory path name that specifies where in the file system you want to retrieve the element. The HFS path and file name must be entered using characters and case that match the requirements of the HFS file system. The maximum path length is 768 characters.

The Name field optionally specifies the file name you are going to create that contains the element you are retrieving. Be aware of the following naming conventions:

- **If one element is retrieved:** The Name parameter is used to build the file name of the element retrieved to the HFS path. If you leave the Name field blank, the file is named after the element name.
- **If more than one element is selected:** The Name value is ignored, and the files are named after the element names.

For example, element ABC is written as a file named ABC; element CED is written as a file named CED.

To: Local Directory and Name

Specifies that elements should be retrieved from CA Endevor SCM and downloaded to a directory accessible by your local computer (local or network drive). Local Directory specifies the mandatory local directory path where the retrieved elements will be written.

Note: The first time you use this option, you can be prompted to download the Java 2 Runtime Environment plug-in. For more information, see Install J2RE.

Name optionally specifies the file name. Be aware of the following naming conventions:

- **If one element is retrieved:** The Name parameter is used to build the file name of the element retrieved to the local directory. You can change the name of the element by entering a new name in the Name field.

If you entered the Name value of pccobol, the file name written to the local directory is pccobol. If you leave the Name field empty, the file is named after the element. If an extension is specified in the FILE EXT field of the CA Endevor SCM TYPE record, a period (.) is added and the extension appended. For example, an CA Endevor SCM element name MYCOBOL of the type COBOL, with its TYPE defined as cob, is written to the local directory as MYCOBOL.cob.

- **If more than one element is selected:** The Name value is ignored, and an extension is added to each file name if one is defined in the FILE EXT field of the CA Endevor SCM TYPE record.

For example, the following table shows how the selected elements are named when written to the local directory:

Element Name	FILE EXT	Local Filename
MYJAVA	java	MYJAVA.java
MYPASCAL	pas	MYPASCAL.pas
MYC	c	MYC.c
MYC2	<i>none</i>	MYC2
MyDocument.doc	<i>none</i>	MyDocument.doc

If file extensions are not defined, the file names will have no extensions.

The TYPE definition limits the name you can specify when adding a PDS member. Names can be alphanumeric, 1– 255 characters, mixed case, and include the following characters: period, hyphen, and underscore. For example:

```
AB4FG  
abc3eFg.h-j_k
```

Note: For more information on transferring elements to and from local directories, see Local Directory File or Element Transfer. For more information on setting up TYPE records, see the CA Endeavor SCM documentation. For more information on file naming standards, see the *CA Endeavor SCM Change Manager Administrator Guide*.

CCID

Specifies a Change Control Identifier, which lets you relate a CCID to an action, or one activity to another. For example, if you have several files related to one problem, you can assign each one the same CCID.

Signout Element

Specifies that the element should be signed out to you and marked as reserved for your use if it is not signed out to someone else. If you want a copy of the element, leave this option cleared.

Override Signout

If the element is signed out to a person other than yourself, specifies to replace their signout information with your own. You must be authorized to override their signout information with your own.

Expand Includes

Specifies that INCLUDE statements should be expanded when the element is written to the source output library.

Replace Member or File

Specifies whether to replace members or files. This field changes depending on the destination type:

- **If the destination type is DSN:** Specifies that CA Endeavor SCM should replace a member with the same name in the TO data set.
- **If the destination type is HFS or Directory:** Specifies that CA Endeavor SCM should replace the file.

Retrieve Elements

Retrieving elements copies them to a data set or file system and signs them out to your user ID.

To retrieve an element

1. Perform one of the procedures in the previous section, Search for Elements.

The CA Endevor SCM Element Search page displays the search results, listing the elements that meet your search criteria.

2. Select the members you want by checking their boxes.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Retrieve link at the top of the page.

The Options area opens, defaulting to the Retrieve tab.

Note: The first time you use this action, you MAY be prompted to download the JRE plug-in and security applet. For more information, see Install J2RE.

4. Select one of the following three destinations, depending on where you want to retrieve the element:

- To: DSN
- To: HFS
- To: Local Directory

5. Configure the remaining optional data fields.

6. Click Execute.

Note: If you are retrieving files to the client machine, the system performs validations in addition to CA Endevor SCM processing, including pre-processing and post-processing.

The progress bar indicates the progress of the element download from the CA CM Enterprise Workbench server to the client machine. If you click Cancel during the transfer, the retrieve operation stops, and the file is not written to the local machine. After the transfer is complete (100%), the element download cannot be canceled.

The selected elements are copied to the library or the directory designated. When processing completes, the CA Endevor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endevor SCM - Retrieve Successful message displays with the link to View Action Report.

- **If the action failed**, the CA Endeavor SCM- Retrieve Failed message displays, along with the return code, reason code message, and the link to View Action Report.

More information:

- For more information about the Action Report, see the chapter "Getting Started."
- For more information on error messages, see the appendix "Local File System API Error Messages."

Move Tab

You move elements using the Move tab.

The screenshot shows a software interface titled "Options" with a tabbed menu. The tabs are "Retrieve", "Move", "Signin", "Delete", "Generate", and "Transfer". The "Move" tab is currently selected. To the right of the tabs is an "Execute" button. Below the tabs, the "Move Options:" section contains the following fields and controls:

- Comment: A text input field.
- CCID: A text input field.
- Synchronize: A checkbox, currently unchecked.
- With History: A checkbox, currently unchecked.
- Retain Signout: A checkbox, currently unchecked.
- Signout to User: A text input field.
- Ack. Element Jump: A checkbox, currently unchecked.
- Delete 'From' Element: A checkbox, currently checked.

This tab contains the following fields:

Comment

Defines a comment, up to 40 characters.

CCID

Specifies the Change Control Identifier, which lets you relate a CCID to an action, or one activity to another. For example, if you have several files related to one problem, you can assign each one the same CCID.

Synchronize

Specifies whether you want the Move action performed when the base level of the element at the source location is different from the current level of the element at the target.

When you select the option, CA Endeavor SCM creates a synchronization level at the target that reflects the differences between the base level at the source location and the current level at the target.

If these levels are different and you have not selected Synchronize, the move fails.

With History

Specifies whether you want to move the element with history. When you move the element without history, CA Endeavor SCM searches the element levels at the source location to find a matching level at the target location. CA Endeavor SCM then compares the two, and creates a new level at the target location that reflects the differences.

Retain Signout

Specifies whether CA Endeavor SCM retains the signout associated with an element at the source location when it is moved to the target location.

Signout to User

Specifies the user ID of the user that the element should be signed to out at the target location.

Ack. Element Jump

Specifies that whenever CA Endeavor SCM jumps an element during a move, it issues a notification message.

CA CM Enterprise Workbench uses this option when CA Endeavor SCM finds an element being moved at a non-mapped stage between the From and To locations. When this occurs, CA Endeavor SCM checks the system definition. If the system's REQ ELM JUMP ACKNOWLEDGEMENT=Y, then you must select the Ack. Element Jump option to move elements.

Delete 'From' Element

Specifies whether you want CA Endeavor SCM to delete the elements at the source location after moving them.

Move Elements

Moving one or multiple elements moves them between stages along the map, in or across environments.

To move an element

1. Perform one of the procedures in the previous section, Search for Elements.

The CA Endevor SCM Element Search page displays the search results, listing the elements that meet your search criteria.

2. Select the members you want to move.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

The Options area opens, defaulting to the Move tab.

3. Specify one or more of the optional fields.

For more information, see Move Tab.

4. Click Execute.

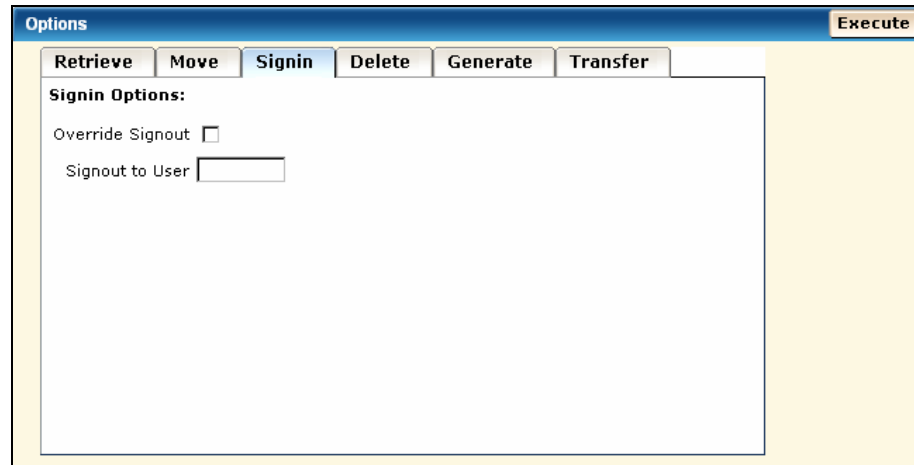
When processing completes, the CA Endevor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endevor SCM - Move Successful message displays with the link to View Action Report.
- **If the action failed**, the CA Endevor SCM- Move Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.”

Signin Tab

You reassign the user signout associated with an element using the Signin tab.



The screenshot shows a dialog box titled "Options" with a blue header bar. In the top right corner of the header is an "Execute" button. Below the header is a row of six tabs: "Retrieve", "Move", "Signin", "Delete", "Generate", and "Transfer". The "Signin" tab is currently selected and highlighted in blue. The main area of the dialog is white and contains the following fields:

- Signin Options:** A section header.
- Override Signout:** A checkbox that is currently unchecked.
- Signout to User:** A text input field.

This tab contains the following fields.

Override Signout

Specifies that, if the element is signed out to a user other than you, the element should be updated. You must be authorized to override the other user's signout information with your own.

Signout to User

After signing in an element, specifies the user ID of the user that the element should be signed to out at the target location.

Sign In Elements

The Signin action lets you remove the user signout associated with an element.

To sign in an element

1. Perform one of the procedures in the previous section, Search for Elements.

The CA Endeavor SCM Element Search page displays the search results, listing the elements that meet your search criteria.

2. Select the members you want.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Signin link at the top of the page.

The Options area opens, defaulting to the Signin tab.

4. Enter data in the fields.

For more information, see Signin Tab.

5. Click Execute.

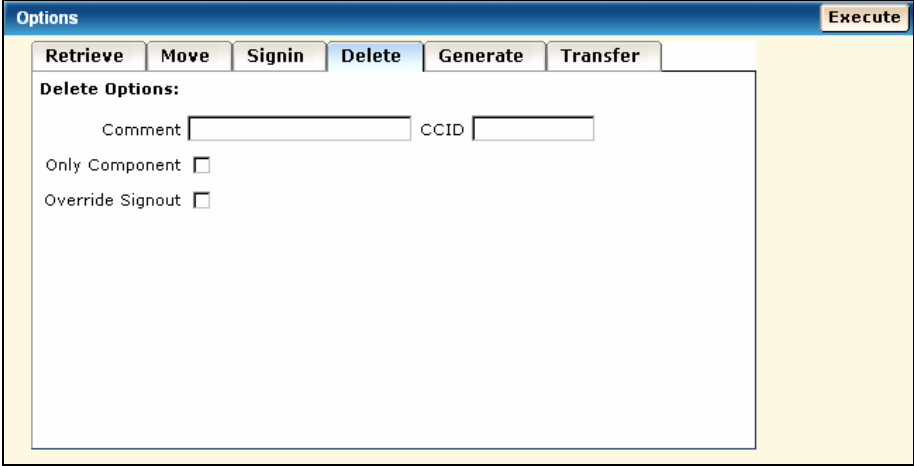
When processing completes, the CA Endeavor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endeavor SCM - Signin Successful message displays with the link to View Action Report.
- **If the action failed**, the CA Endeavor SCM- Signin Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.”

Delete Tab

You delete elements using the Delete tab.



The screenshot shows a software interface titled "Options" with a tabbed menu. The tabs are "Retrieve", "Move", "Signin", "Delete" (which is highlighted in blue), "Generate", and "Transfer". To the right of the tabs is an "Execute" button. Below the tabs, under the heading "Delete Options:", there are two text input fields: "Comment" and "CCID". Below these fields are two checkboxes: "Only Component" and "Override Signout", both of which are currently unchecked.

The Delete tab contains the following fields:

Comment

Defines a comment, up to 40 characters.

CCID

Specifies the Change Control Identifier, which lets you relate a CCID to an action, or one activity to another. For example, if you have several files related to one problem, you can assign each one the same CCID.

Only Component

Specifies that you want to delete only the element component list. If cleared, it specifies that you want to delete the element as well as the element component list.

Override Signout

Specifies that, if the element is signed out to a user other than you, the element should be updated. You must be authorized to override the other user's signout information with your own.

Delete Elements

Deleting an element removes it from CA Endevor SCM.

To delete an element

1. Perform one of the procedures in the previous section, Search for Elements.

The CA Endevor SCM Element Search page displays the search results, listing the elements that meet your search criteria.

2. Select the members you want to delete.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Delete link at the top of the page.

The Options area opens, defaulting to the Delete tab.

4. Enter data in the tab fields.

For more information, see Delete Tab.

5. Click Execute.

When processing completes, the CA Endevor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endevor SCM - Delete Successful message displays with the link to View Action Report.
- **If the action failed**, the CA Endevor SCM- Delete Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter "Getting Started."

Generate Tab

You enter options for the CA Endeavor SCM automated generate processor on the Generate tab.

The screenshot shows a software interface titled 'Options' with a tabbed menu. The 'Generate' tab is active. Inside this tab, there is a section labeled 'Generate Options:'. This section contains several input fields: a 'Comment' text box, a 'CCID' text box, two checkboxes labeled 'Copy Back Search' and 'Override Signout', and a 'Processor Group' text box. An 'Execute' button is located in the top right corner of the dialog box.

This tab contains the following fields:

Comment

Defines a comment, up to 40 characters.

CCID

Specifies the Change Control Identifier, which lets you relate one activity to another. For example, if you have several files related to one problem, you can assign each one the same CCID.

Copy Back / Copy Back Search / Copy Back No Search

Copy Back specifies whether you want to copy the element to the From stage and generate it at that stage.

Copy Back Search appears when you have explicitly searched for elements using the Build Element List Using Map option on the ENDEVOR tab of the CA Endeavor SCM Element Search page. This specifies a logical search. When you select Copy Back Search, the marked element or elements are copied back to the first stage found in the map, corresponding to the definition of system, subsystem, and stage.

Copy Back No Search appears when you have specified a non-explicit search using wildcards in the Environment field of the ENDEVOR tab on the CA Endeavor SCM Element Search page. This specifies a physical search. When you select Copy Back No Search, the marked element or elements are copied back to the entry stage, corresponding to the location of the element or elements.

Note: For more information on physical and logical searches, see ENDEVOR tab.

Override Signout

Specifies that, if the element is signed out to a user other than you, the element should be updated. You must be authorized to override the other user's signout information with your own.

Processor Group

Specifies the processor group to use. CA Endeavor SCM executes the generate processor in this group. After the generate processor runs for the element, CA Endeavor SCM updates the information in the Master Control File.

Generate Elements

The Generate action executes the CA Endeavor SCM automated generate processor for an element.

To generate an element

1. Perform one of the procedures in the previous section, Search for Elements.

The CA Endeavor SCM Element Search page displays the search results, listing the elements that meet your search criteria.

2. Select the members you want by checking their boxes.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Generate link at the top of the page.

The Options area appears, defaulting to the Generate tab.

4. Enter data in the tab fields.

For more information, see Generate Tab.

5. Click Execute.

When processing completes, the CA Endeavor SCM Element Action Result page opens.

- **If the action succeeded**, the CA Endeavor SCM - Generate Successful message displays with the link to View Action Report.
- **If the action failed**, the CA Endeavor SCM- Generate Failed message displays, along with the return code, reason code message, and the link to View Action Report.

If the generate processor fails (for example, because of a compile error) you may want to look at the compiler output listing that was generated when the processor ran. If you cannot see this output directly, your CA Endeavor SCM administrator may have stored the listing in a listing file. If you know this file name you can browse the report from the DSN tab on the CA Endeavor SCM File Search page.

Note: For more information about the Action Report, see the chapter “Getting Started.”

Transfer Tab

You transfer elements using the Transfer tab.

The screenshot shows the 'Options' dialog box with the 'Transfer' tab selected. The 'Transfer Options' section contains the following fields and checkboxes:

- Comment: [Text Field]
- CCID: [Text Field]
- To: Environment: [Text Field]
- System: [Text Field]
- Subsystem: [Text Field]
- Element: [Text Field]
- Type: [Text Field]
- Stage: [Text Field]
- With History: ☐
- Synchronize: ☐
- Retain Signout: ☐
- Override Signout: ☐
- Signout To User: [Text Field]
- Processor Group: [Text Field]
- Ignore Generate Failed: ☐
- Generate Element: ☐
- Delete 'From' Element: ☒
- Bypass Delete Processor: ☐

This tab contains the following fields:

Comment

Defines a comment, up to 40 characters.

CCID

Specifies the Change Control Identifier. This entry lets you relate one activity to another. For example, if you have several files related to one problem, you can assign each one the same CCID.

With History

Specifies whether you want to transfer the element with history. When you transfer the element without history, CA Endeavor SCM searches through the element levels at the source location to find a matching level at the target location. CA Endeavor SCM then compares the two and creates a new level at the target location that reflects the differences.

Synchronize

Specifies whether you want the Transfer action performed when the base level of the element at the source location is different from the current level of the element at the target. The transfer fails if these levels are different and you have not checked Synchronize.

You must select Synchronize when moving an element that remains at a source location after being transferred by clearing the Delete 'From' Element option.

Retain Signout

Specifies whether CA Endeavor SCM retains the signout associated with an element at the source location when it is transferred to the target location.

Override Signout

Specifies that, if the element is signed out to a user other than you, the element should be updated. You must be authorized to override the other user's signout information with your own.

Signout to User

Specifies the user ID of the user that an element, after being signed in, should be signed to out at the target location.

Processor Group

Specifies the processor group to use. CA Endeavor SCM executes the generate processor in this group, if one is specified. After the generate processor runs for the element, CA Endeavor SCM updates the information in the Master Control File.

Ignore Generate Failed

Specifies that, before transferring elements, CA Endeavor SCM should not check to see if the most recent processor that was executed against the elements ran successfully.

Delete 'From' Element

Specifies whether you want CA Endeavor SCM to delete the elements at the source location after transferring them.

Generate Element

Specifies to forego standard delete processing for the elements in the 'From' location.

Bypass Delete Processor

Specifies to override the actions of executing the delete processor and deleting the element at the source location of the transfer.

Transfer Elements

The Transfer action moves one or multiple elements between locations that are not on the same map route. You use the Move action to move elements through the software life cycle. Use the Transfer action to move elements when the move is not associated with the software life cycle.

To transfer an element

1. Perform one of the procedures in the previous section, Search for Elements.

The CA Endevor SCM Element Search page displays the search results, listing the elements that meet your search criteria.

2. Select the members you want to transfer.

Note: Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

3. Click the Transfer link at the top of the page.

The Options area opens, defaulting to the Transfer tab.

4. Enter the location to which you want to transfer the element, by completing the text boxes for: Environment, System, Subsystem, Element name, Type, and Stage.
5. Enter data in the remaining tab fields.
6. Click Execute.

When processing completes, the CA Endevor SCM Element Action Result page appears.

- **If the action succeeded**, the CA Endevor SCM - Transfer Successful message displays with the link to View Action Report.
- **If the action failed**, the CA Endevor SCM- Transfer Failed message displays, along with the return code, reason code message, and the link to View Action Report.

Note: For more information about the Action Report, see the chapter “Getting Started.”

Element Master Page

The CA Endevor SCM Element Master page displays detailed information about the selected element.

Element and Component Links

The page contains links to Element and Component information. These links include the following:

- Browse
- Changes (appears only for text elements)
- History (appears only for text elements)
- Summary

More information:

These operations are detailed in View Element and Component Information.

Display Areas

You can view comprehensive display areas on the page that include the following:

Details

Provides information from the element's Master Control File:

Processor Group

Name of processor group for the element

Version.Level

Version and level of the element

Last Action

Last action performed against the element

Description

Comment provided for the Add action that created the base level of the element

Signout ID

User ID of the person to whom the element is signed out

Package (source)

ID of the package that last affected the source form of this element

Package (output)

ID of the package that created the current generated (or output) form of this element

Locked for Package

When the element locking feature is enabled in the CA Endeavor SCM Options Table (ENCOPTBL), this field displays the package that has secured (locked) the element

Locked Date and Time

The date and time the package was locked

Last Element Action

Lists the last CA Endeavor SCM action performed against this element.

Current Source

These fields provide information about the current source for the element. The Delta Format field indicates whether the element changes are stored in forward (F) or reverse (R) delta format. The Add/Update from DSN field identifies the data set from which the element was added.

Generate

These fields provide information about the last action run against the element that caused output to be generated. The Component List Version.Level field identifies the latest version and level of the component list for the element.

Retrieve

Provides information on when Retrieve was the last action performed against this element. Otherwise the fields are empty. The Retrieve to DSN field identifies the target data set for the Retrieve action.

Base

Provides information about the base level of the element. These fields show the user ID of the person who created the base level, the date and time that the base level was created, and the comment that was entered for the Add action that created the base level.

From CA Endeavor SCM Location

Information appears in these fields when the element has been moved or transferred from another CA Endeavor SCM location. These fields show the user ID of the person who requested the Move or Transfer action, the date and time that the action was performed, and the name of the action (Move or Transfer).

Note: For more information about CA Endeavor SCM Element Master fields, see the *CA Endeavor SCM Change Manager User Guide*.

View Element Masters

You view information about element masters on the CA Endeavor SCM Element Master page.

To access an element master

1. Perform one of the procedures in the previous section, Search for Elements.

The CA Endeavor SCM Element Search page displays the search results, listing the elements that meet your search criteria.

2. Click the link for a particular element name.

The CA Endeavor SCM Element Master page appears. For example:

Information					
Project: QA2 / WEBSALES / INVENTORY					
Element: FINAPP06					
Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES	INVENTORY	C	FINAPP06	COBOL
Element: Browse Changes History Summary Component: Browse Changes History Summary					
Details					
Processor Group: COBOL					
Version Level: 01.00					
Last Action: ADD					
Description: TEST FIX FOR WEBSALES					
Signout ID: USER01					
Package(source):					
Package(output):					
Locked For Package:					
Locked Date and Time:					

Note: For DSN and USS elements, the element master From and To properties contain the location path. For transfer to and from the client machine, this is the Java name convention that includes the machine name, drive letter, and directory path.

View Element and Component Information

On the CA Endeavor SCM Element Master page, element information is followed by the Element and Component link menus:

Information					
Project: QA2 / WEBSALES / INVENTORY					
Element: FINAPP06					
Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES	INVENTORY	C	FINAPP06	COBOL
Element: Browse Changes History Summary Component: Browse Changes History Summary					

Note: For binary elements, only the Browse and Summary links appear.

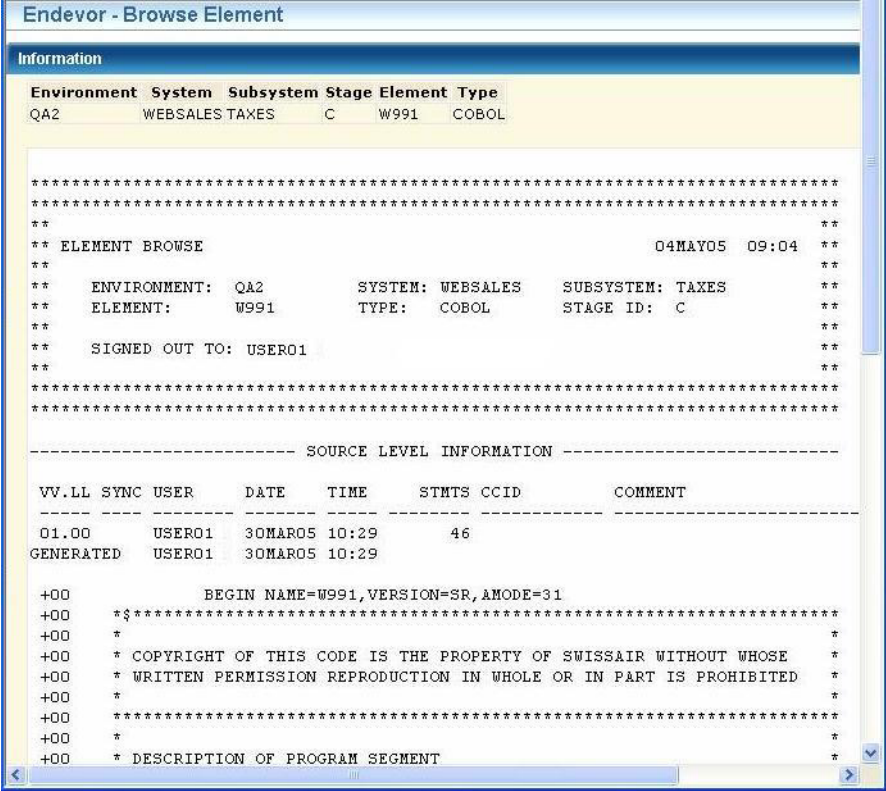
The following sections detail how to use these links to view element and component information.

Browse Elements and Components

CA CM Enterprise Workbench and CA Endeavor SCM handle text and binary elements differently. For more information, see *How CA Endeavor SCM TYPE Records Affect File Operations*.

To browse text files

When you click the Element: Browse link, a new window opens. If the element is *text*, the text is converted from its mainframe character set to the local file system character set. For example:



The screenshot shows a window titled "Endeavor - Browse Element" with a tab labeled "Information". The window displays the following information:

Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES	TAXES	C	W991	COBOL

```

** ELEMENT BROWSE                                04MAY05 09:04 **
**
** ENVIRONMENT: QA2          SYSTEM: WEBSALES  SUBSYSTEM: TAXES
** ELEMENT:      W991        TYPE: COBOL      STAGE ID: C
**
** SIGNED OUT TO: USER01
**
*****

```

----- SOURCE LEVEL INFORMATION -----

VV.LL	SYNC	USER	DATE	TIME	STMTS	CCID	COMMENT
01.00		USER01	30MAR05	10:29	46		
GENERATED		USER01	30MAR05	10:29			

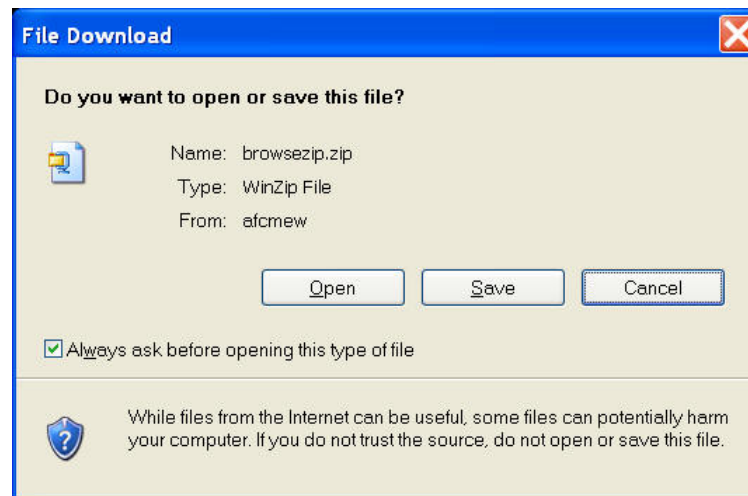
```

+00          BEGIN NAME=W991,VERSION=SR,AMODE=31
+00  *$*****
+00  *
+00  * COPYRIGHT OF THIS CODE IS THE PROPERTY OF SWISSAIR WITHOUT WHOSE
+00  * WRITTEN PERMISSION REPRODUCTION IN WHOLE OR IN PART IS PROHIBITED
+00  *
+00  *****
+00  *
+00  * DESCRIPTION OF PROGRAM SEGMENT
+00

```

To browse binary files

When you click the Element: Browse link, if the element is *binary*, depending on your browser's capabilities, the binary data stream may be recognized and the file displayed directly in the browser. If not, and the file extension is a registered Windows file type, the file is opened in the native application. If the file type is either not recognized or the security settings on your local machine prevent recognized files from being opened automatically, a dialog similar to the following appears:



Click Open to attempt to open the file in the native application. Click Save to Save the file on your local system. Click Cancel to cancel the browse operation.

To browse components

When you click the Component: Browse link, a new browser window opens. The CA Endeavor SCM Browse Component page displays the component information. For example:

Endeavor - Browse Component

Information

Print

Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES PROCESS	C		ELMDPRC2 PROCESS	

**

** COMPONENT BROWSE 01APR05 13:14 **

**

** ENVIRONMENT: QA2 SYSTEM: WEBSALES SUBSYSTEM: PROCESS **

** ELEMENT: ELMDPRC2 TYPE: PROCESS STAGE ID: C **

**

** SIGNED OUT TO: USER01 **

**

----- SOURCE LEVEL INFORMATION -----

VV.LL	SYNC	USER	DATE	TIME	STMTS	CCID	COMMENT
01.00		USER01	12JAN05	11:35	8		DELETE FROM QA2S2 PROC/OUTPUT LIBE

----- ELEMENT INFORMATION -----

VV.LL	DATE	TIME	SYSTEM	SUBSYS	ELEMENT	TYPE	GROUP	STG	STE	ENVRMNT	PROCESSOR	
+00	01.00	12JAN05	11:35	WEBSALES	PROCESS	ELMDPRC2	PROCESS	PROCESS	1	0	QA2	GPPROCESS

If no component information exists for the current element, the browser displays the message, "No component list for the selected element." If you click the link "Click here for additional information," the browser window opens the CA Endeavor SCM API Execution Report. This report contains informational, warning, and error messages detected while the request was being processed. The report also displays return and reason code information, and selection counts.

Note: For more information about messages, see the CA Endeavor SCM Change Manager API Guide and the CA Endeavor SCM Change Manager Error and Message Guide.

View Element and Component Changes

You can view changes to elements and components.

To view changes to an element

Click the Element: Changes link.

A new browser window opens the CA Endevor SCM Browse Element Changes page. This page displays all inserts and deletions made to the element between the specified level and its immediate predecessor. By default, the page displays the current level.

To view changes to a component

Click the Component: Changes link.

A new browser window opens the CA Endevor SCM Browse Component Changes page. This page displays all inserts and deletions made to the element between the specified level and its immediate predecessor. By default, the page displays the current level.

View Element and Component History

You can view changes to elements and components.

To view detailed history of an element

Click the Element: History link.

A new browser window opens the CA Endevor SCM Browse Element History page. An example follows.

Endevor - Browse Element History

Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES INVENTORY	C		FINAPP06 COBOL	

 ** ELEMENT HISTORY 01APROS 14:16 **
 **
 ** ENVIRONMENT: QA2 SYSTEM: WEBSALES SUBSYSTEM: INVENTORY **
 ** ELEMENT: FINAPP06 TYPE: COBOL STAGE ID: C **
 **
 ** SIGNED OUT TO: USER01 **
 **

----- SOURCE LEVEL INFORMATION -----

VV	LL	SYNC	USER	DATE	TIME	STMTS	CCID	COMMENT
01	00		USER01	10JAN05	12:44	100		TEST FIX FOR WEBSALES
GENERATED			USER01	10JAN05	12:44			TEST FIX FOR WEBSALES

```

+00 000100 IDENTIFICATION DIVISION.
+00      PROGRAM-ID. FINAPP06.
+00 000300 ENVIRONMENT DIVISION.
+00      INPUT-OUTPUT SECTION.
+00 000500 FILE-CONTROL.
+00          SELECT REPORT-FILE ASSIGN U-T-SYSOUT.
+00          SELECT INPUT-FILE ASSIGN U-T-INPUT.
  
```

To view detailed history of a component

Click the Component: History link.

A new browser window opens the CA Endeavor SCM Browse Component History page. An example follows.

Endeavor - Browse Component History

Information

Print

Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES PROCESS	C		ELMDPRC2 PROCESS	

**

** COMPONENT HISTORY

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View Element and Component Summary

You can view summaries of elements and components.

To view a summary of an element

Click the Element: Summary link.

A new browser window opens the CA Endevor SCM View Element Change Summary page.

Endevor - View Element Change Summary					
Information Print					
Project: QA2 / WEBSALES / SALES					
Element: abcdefgh					
Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES SALES		C	abcdefgh	LONGNAME

Details					
VV.LL	User	Date	Time	Statements	Sync
01.00	USER01	30MAR05	11:10	5	
GENERATED					
	USER01	30MAR05	11:10		
RETRIEVED					
	USER01	30MAR05	11:20		

The Details area lists the Version.Level (VV.LL) of the element and the number of statements in this level. It also includes a history of the actions performed on the element, identifying the user who performed the action, and the date and time the action took place. The Sync column indicates whether this level was created through synchronization (S) or level consolidation (C).

To view a summary of a component

Click the Component: Summary link.

A new browser window opens the CA Endeavor SCM View Component Change Summary page.

Endevor - View Component Change Summary					
Information Print					
Project: QA2 / WEBSALES / PROCESS					
Element: ELMDPRC2					
Environment	System	Subsystem	Stage	Element	Type
QA2	WEBSALES PROCESS	C		ELMDPRC2 PROCESS	
Details					
VV.LL	User	Date	Time	Statements	
01.00	USER01	12JAN05	06:35	8	

The Details area lists the Version.Level (VV.LL) of the element and the number of statements in this level. It also includes a history of the actions performed on the element, identifying the user who performed the action, and the date and time the action took place.

Local Directory File or Element Transfer

The CA CM Enterprise Workbench Retrieve, Add, and Update Element actions support the transfer of CA Endeavor SCM elements to or from directories or file systems accessible from the local client machine (a PC running a supported version of Microsoft Windows), including local or network drives. You can retrieve elements to directories or file systems accessible from the local client machine where you can edit the elements with a workstation-based editor. You can then use CA CM Enterprise Workbench to move them back to CA Endeavor SCM using the Update action, or add new files using the Add action.

Before the optional fields for local directory operations can appear in CA CM Enterprise Workbench, this option must be enabled in the ew.cfg file, and you must be using CA Endeavor SCM r7.

You can perform the following CA Endeavor SCM actions:

- Retrieve elements to a local directory
- Add files from a local directory as new CA Endeavor SCM elements
- Update existing CA Endeavor SCM elements from local directory files
- Browse binary files based on file type
- Review Execution reports of Retrieve, Add, or Update actions

Note: For more information about finding files in local directories to add or update in CA Endeavor SCM, see File Operations.

General Considerations for Exchanging Files Between Platforms

Note: Special CA Endeavor SCM TYPE record definitions or adjustments to existing TYPE records are required to use this feature.

The CA Endeavor SCM API is extended with pre- and post-API processing that the applet executes from the local browser. The final status of an action includes the result of the pre- and post-API processing. This additional status information displays as part of the CA Endeavor SCM API Execution Report, which you can view with CA CM Enterprise Workbench.

Interactions with the local file system are not available through CA Endeavor SCM SCL.

Note: For more information, see View Element and Component Information.

How CA Endeavor SCM TYPE Records Affect File Operations

CA CM Enterprise Workbench and CA Endeavor SCM handle text and binary elements differently. To enable CA CM Enterprise Workbench to browse elements or components or exchange files or elements, an CA Endeavor SCM TYPE record must be properly defined for each file type you want to browse. The following TYPE fields affect CA CM Enterprise Workbench behavior:

TYPE

Assigns a user-specified name for a particular file type. Examples include MYTYPE, TEXT, COBOL, WORD, PDF, EXCEL, ZIP.

DATA FORMAT

Indicates whether the file type is one of the following:

Text (T)

Prompts CA CM Enterprise Workbench to perform EBCDIC-to-local system character conversion using character sets specified in the Endeavor.cfg configuration file.

Binary (B)

Specifies that no character conversion should be applied during Add, Update, or Retrieve actions.

If the DATA FORMAT is not set, no character conversion is applied during Add, Update, or Retrieve actions.

FILE EXT

(Optional.) Specifies a file extension to be used when constructing a file name; for example, DOC for Microsoft Word files, or PDF for Adobe Reader files.

Defining the appropriate extension enables Windows to recognize the file type and associate it with a particular application. For example, defining the file extension PDF for Adobe Reader files enables a Windows machine to recognize the file and open it in Reader if the PDF extension is associated with the Reader application on the Windows machine.

Note: For more information on TYPE definitions, see the *CA Endeavor SCM Change Manager Administrator Guide*.

Character Set Conversion

Character sets for text files are converted from EBCDIC on the mainframe to the character set recognized and supported by the local workstation. The character sets for the mainframe and the local file system are defined in the Endeavor.cfg configuration file.

Character Sets on the Local Machine

The character sets supported on the workstation side are those included in J2RE installed on the CA CM Enterprise Workbench server. The character sets installed on the server should be identical to the character sets that J2RE supports on client workstations.

File Structure and Physical Environment

The structure of an CA Endeavor SCM element or local file system file is constrained by its physical representation on either platform. For example, the settings of an editor on the local workstation determine how record delimiters are handled. Similarly, the definition of the physical libraries on the mainframe determine required file structure. When you define mainframe resources related to the CA Endeavor SCM TYPE (base and delta libraries), be sure to review how specialized CA Endeavor SCM routines or workstation applications handle those file types.

Preserving File Format and Structure

When a file has been retrieved to the local file system, any application you use to edit the file must preserve the format of the file. For binary files (DATA FORMAT=B), the editor is typically associated with the application; for example, Microsoft Word or Microsoft Excel.

For text files (DATA FORMAT=T), the editor must maintain the format associated with the CA Endeavor SCM TYPE definition, including the linefeed setting. Text files are also likely to be associated with an application that handles mainframe-based work. For example, a COBOL file is stored in CA Endeavor SCM as fixed-length, 80-byte records, and defined with a TYPE record DATA FORMAT=T. If you retrieve this file to the local machine to work on it, the editor must maintain the fixed length. If it does not maintain the fixed length, CA Endeavor SCM generates an error when you transfer the file back to the mainframe.

Chapter 4: Performing CA Endeavor SCM Package Actions

More Information on Package Processing

Use this chapter in conjunction with the *CA Endeavor SCM Change Manager Packages Guide*, which fully describes package processing and approver groups.

Search to Locate a Package

Use the CA Endeavor SCM Package Search facility to locate CA Endeavor SCM packages that meet your selection criteria.

To search for CA Endeavor SCM packages

1. Click the Locator drop-down menu and select CA Endeavor SCM Package Search.

The CA Endeavor SCM Package Search page opens.

2. Enter the name of the package that you want to search for in the CA Endeavor SCM packages to list field. Package names are case-sensitive in CA Endeavor SCM. Whatever you type is forced to uppercase.

Note: You can use wildcard (*) or placeholder (%) characters to narrow the results. For example, if you entered T*, the system would search for package names that began with the letter T.

3. Select one or more of the CA Endeavor SCM package statuses.

The first time you view this screen, all statuses are selected by default. Clicking the flashing checkmark at the top of the list lets you select all or clear all listed elements.

4. Specify what the search should include or exclude using the drop-down list.

Note: If your site is using CA Endeavor SCM r12 SP2, then additional fields let you specify whether the search should include promotion packages, or the package types standard or emergency.

5. Click Search.

The Result area on the CA Endevor SCM Package Search page lists the packages that match your specified search criteria.

CA Endevor SCM Package Detail Page

The CA Endevor SCM Package Detail page provides information about a package. The fields, action buttons, and links displayed on this page vary depending on the package. On this page, you can view general information about the package including its status, the Enterprise package with which it is associated (if any), the package details, package history, package notes, and link to additional reports.

This page includes several sections. Following is a summary of those sections and their fields, links, or buttons that require explanation:

General Information

This section displays the package name, description, status, and whether this is a promotion package.

You can use the Modify and EditSCL links to specify updates to the current package.

Only those action buttons that are appropriate for the current status of the package are displayed. For example:

- If the package status is In-Edit, the Cast button is displayed.
- If the package status is In-Approval, the Approve and Deny buttons are displayed.
- If the package status is Executed, backout records exist, and the CA Endevor SCM Package Ship feature is enabled at your site, the Ship button is displayed.

Package Detail

This section provides detailed information about the package.

Package Type

Identifies the type of package, standard or emergency.

Sharable Package

Displays Y or N to indicate if the package is sharable.

Backout Enabled

Displays Y or N to indicate if backout is enabled for the package.

Promotion Target Env/StgId

Displays the target environment and stage ID, if this is a promotion package with a status higher than Approved. Otherwise this field is blank.

Execution Window From

Identifies the execution window's beginning date and time.

Execution Window To

Identifies the execution window's ending date and time.

CA Endeavor SCM RC

Identifies the CA Endeavor SCM return code after it has been executed, if applicable.

Package History

This section displays a history of all package actions.

Created

Identifies information about when the package was created, including the User ID of the creator, the creation date, and the creation time.

Last Updated

Identifies information about the most recent package update.

Cast

Identifies information about who cast the package, and when.

Approved/Denied

Identifies the date and time that the package was approved or denied.

Execute Begin

Identifies the date and time the package execution began.

Execute End

Identifies the date and time the package execution ended.

Backed Out

Identifies the date and time that the package was backed out, if applicable.

Backed In

Identifies the date and time that the package was backed in, if applicable.

Committed

Identifies the date and time that the package was committed, if applicable.

Last Shipped

Identifies the date and time that the package was shipped and the destination to which it was shipped.

Approver Groups

This section provides information about the approver groups associated with the package.

Environment

Identifies the CA Endeavor SCM environment that the named approver group is associated with.

Approver Group

Displays a link that opens the CA Endeavor SCM Approver Groups page. This page displays detailed information about the approver groups, including the user ID of each member of the group, and an indicator showing whether each has approved the package. When you are finished reviewing approver group information, click Done to return to the previous page.

Approval Status

Identifies the approval status for the package.

Quorum

Identifies the minimum number of approvers in the group who must give their approval for the package to be approved.

Number of Approvers

Identifies the number of people acting as approvers.

Number Approved

Identifies the number of approvals given.

Number Denied

Identifies the number of denials given.

Note: For more information on approver groups and external approver groups, see View Approver Group Information.

Package Notes

This section displays up to 480 characters of free-form text associated with the package from the time that it was created, through the time that it is approved. The text is created and maintained in CA Endeavor SCM and displayed in CA CM Enterprise Workbench.

Additional Reports

This section shows additional CA Endeavor SCM package information. Click a report link to select the option you want to view. Clicking the report link opens the corresponding page. Information is listed under the Details header. When you are finished viewing the information, click Done on the Details header to return to the previous page.

The following describes the reports listed:

CA Endeavor SCM Action Summary

Displays detailed information about each package action, and provides access to the CA Endeavor SCM elements being acted on in the package.

CA Endeavor SCM Backout Information

Displays the backout information for each element in the package.

CA Endeavor SCM Cast Report

Displays the Cast Report for the package.

CA Endeavor SCM Package History

Displays the history for the package.

CA Endeavor SCM Promotion Package History

Displays details about each version of a promotion package.

CA Endeavor SCM SCL Report

Displays the SCL commands executed in the CA Endeavor SCM package.

Package Ship History

Displays the CA Endeavor SCM Package Ship History for the package.

View Approver Group Information

From the CA Endeavor SCM Package Detail page, you can access the CA Endeavor SCM Approver Groups page to view detailed information about approver groups.

To view approver group information

1. Scroll down to the Approver Groups section and click the Approver Group name link.

The CA Endeavor SCM Approver Groups page opens. This page lists the approvers in the group and any approval action they have taken on the package.

2. Click Done.

The previous page opens.

CA Endeavor SCM Package Actions

You can perform a variety of actions on a CA Endeavor SCM package, including the following:

- Create or modify packages
- Cast a package
- Approve a package
- Execute a package
- Back out a package
- Back in a package
- Commit a package
- Reset a package
- Delete a package
- Ship a package

Note: CA CM Enterprise Workbench honors all package rules in effect at your site. You can perform only those package actions that can be performed through ISPF. For more information, see the *CA Endeavor SCM Change Manager User Guide*.

CA Endeavor SCM Package Create Page

You can create or modify CA Endeavor SCM packages using the CA Endeavor SCM Package Create page.

This page contains the following fields:

Name

Defines the name of the CA Endeavor SCM package. Package names can be up to 16 characters in length.

Note: If the automatic name creation feature is enabled in the Endeavor.cfg file (GenPkgIdEnabled=Y), then -Auto Generated- shows in the Name field, and the field is not editable. A CA Endeavor SCM exit program generates the name. For this option to work, the Exit 7 GENPKGID must be configured in CA Endeavor SCM.

If the automatic name creation override option is enabled in the Endeavor.cfg file (GenPkgIdEnabled=O), -Auto Generated- shows in the name field, but the field is editable. If you do not change the Name field, the name that a CA Endeavor SCM exit program generates is used as the package name. You can optionally specify a different package name instead.

Note: For more information on the Endeavor.cfg file and GenPkgIdEnabled parameter, see the *CA Endeavor SCM Implementation Guide*. For more information on CA Endeavor SCM Exit 7 GENPKGID functionality, see the *CA Endeavor SCM Change Manager Exits Guide*.

Description

Specifies a comment about the CA Endeavor SCM package, up to 50 characters in length.

Promotion Package

Specifies whether this is a promotion package. Valid values are Y or N.

Package Type

Identifies whether the new package is Standard or Emergency.

Enable Backout

Specifies whether the package can be backed out. Selecting Yes lets you restore the executable and output modules to a prior state, if necessary.

Sharable Package

Specifies whether this package can be edited by more than one person when the package is in the In-Edit status:

Yes

Specifies that anyone can edit the package.

No

Specifies that only the creator of the package can edit it.

Execution Window Begin

Defines the date and time that the execution window begins. Enter the data expressed in the time zone of your CA Endeavor SCM system.

Execution Window End

Defines the date and time that the execution window ends. Enter the data expressed in the time zone of your CA Endeavor SCM system.

Create or Modify CA Endeavor SCM Packages

You create or modify CA Endeavor SCM packages with the CA Endeavor SCM Package Create page.

To create or modify a CA Endeavor SCM package

1. Click the Locator drop-down menu and select CA Endeavor SCM Package Create.

The CA Endeavor SCM Package Create page opens.

2. Enter the required data in the page fields.

3. Enter SCL in the SCL Statements text box.

Note: You cannot create the package (use the Create button) until SCL has been entered. SCL lets you manipulate elements, environment definitions, and packages within CA Endeavor SCM. SCL is the language used for the non-interactive (batch) execution of CA Endeavor SCM. For more information about SCL, see the *CA Endeavor SCM Change Manager SCL Reference Guide*.

You can enter SCL for the package directly in the SCL Statements text window. You can also click the SCL Generator link on the right side of the page to generate the SCL using the SCL Generator feature. You can generate SCL for element actions that CA CM Enterprise Workbench supports.

- **If you enter the SCL manually:** Check your syntax carefully and click Create to create the package.
- **If you want to use the SCL Generator:** Perform the procedure To generate SCL using the SCL Generator.

When a package is created successfully, the CA Endeavor SCM Package Create results page opens. The package name shows on the page. The package status is IN-EDIT.

Note: Promotion package SCL is limited to Move actions only.

To generate SCL using the SCL Generator

1. Click the SCL Generator link on the CA Endeavor SCM Package Create page.

The CA Endeavor SCM Search (SCL Generator) page opens, with the DSN tab displayed by default. If the package is a promotion package, then only the ENDEVOR tab is available. During creation, the Package Status is IN-CREATION.

2. Depending on what you are generating SCL for, do *one* of the following:

- **If you are generating SCL for a data set member:** Click the DSN tab and enter a data set name.
- **If you are generating SCL for an HFS file type:** Click the HFS tab and enter a path.
- **If you are generating SCL for an existing CA Endeavor SCM element:** Click the ENDEVOR tab. Enter the information described in Search for an Element in the chapter “Performing CA Endeavor SCM File and Element Actions.”

Note: CA Endeavor SCM SCL does not support file-handling from a local file system.

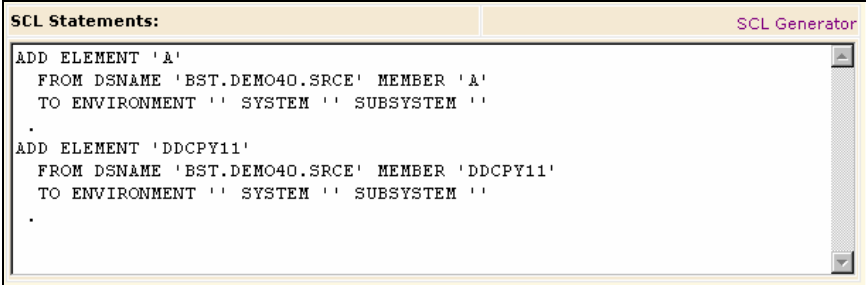
Then click Search.

The Result area displays the matches, if any.

3. Select one or more items in the Result display and then click an ACTION link. (In the following example, the Add link was clicked.)
4. Perform the necessary element action (Add, Update, Retrieve, Move, Delete, Signin, Generate, Transfer) and then click Generate SCL.

Note: If this is a promotion package, then the Move action is the only CA Endeavor SCM action option shown on the page.

The CA Endeavor SCM Package Create page opens, with the generated SCL entered in the SCL Statements text box. See the following example:



The screenshot shows a window titled "SCL Generator" with a tab labeled "SCL Statements:". Inside the window is a text area containing the following SCL statements:

```
ADD ELEMENT 'A'
  FROM DSNAME 'BST.DEMO40.SRCE' MEMBER 'A'
  TO ENVIRONMENT '' SYSTEM '' SUBSYSTEM ''
.
ADD ELEMENT 'DDCPY11'
  FROM DSNAME 'BST.DEMO40.SRCE' MEMBER 'DDCPY11'
  TO ENVIRONMENT '' SYSTEM '' SUBSYSTEM ''
.
```

5. Click Create to create the package.

When a package is created successfully, the CA Endeavor SCM Package Create results page opens. The package name shows on the page. The package status is IN-EDIT.

Note: For more information on generating SCL, see Generate SCL for Elements or Files and Members.

Modify CA Endeavor SCM Package Settings

This section explains how to modify settings for existing CA Endeavor SCM packages. You can modify only packages that have a Package Status of IN-EDIT. You modify CA Endeavor SCM package settings from the CA Endeavor SCM Package Detail page.

To modify CA Endeavor SCM package settings

1. Click the Modify link in the General Information section of the CA Endeavor SCM Package Detail page.

The Details area opens.

2. Make the necessary changes to the information and click Modify. The promotion package attribute cannot be changed, if the package is correlated to an Enterprise package.

The package settings are changed.

Edit SCL

You can edit SCL for existing CA Endeavor SCM packages. You can modify only packages with a package status of IN-EDIT. You edit SCL starting on the CA Endeavor SCM Package Detail page.

To edit SCL

1. Click the EditSCL link in the General Information section of the CA Endeavor SCM Package Detail page.

The CA Endeavor SCM Package EditSCL page opens. This page displays SCL statements that originate from SCL stored in CA Endeavor SCM for a package that is in the IN-EDIT state.

2. Edit the code in the SCL Statements text box and click Save. If this is a promotion package, then only one Move action can be changed.

The system checks the SCL syntax for correctness. If it passes validation, the code is stored with the package. If an error occurs during validation, an Error page opens. On the error page, you can click one of the following links:

- "Click here for additional information."
- "Click here to continue."

Generate SCL for Elements or Files and Members

The system generates SCL for elements or actions.

Note: This function does not address generating and submitting SCL statements related to the CA Endeavor SCM package or life cycle definitions. ISPF 3270 Batch Package is used to submit SCL in the background.

To generate SCL

1. Click the SCL Generator link on the CA Endeavor SCM Package Create page or the CA Endeavor SCM Edit SCL page.

The CA Endeavor SCM Search (SCL Generator) page opens. This page includes both file and element search capabilities.

2. Specify the elements or files for which you want to generate SCL:
 - **If you are generating SCL for a data set member:** Click the DSN tab and enter a data set name.
 - **If you are generating SCL for an HFS file type:** Click the HFS tab and enter a path.
 - **If you are generating SCL for an existing CA Endeavor SCM element:** Click the ENDEVOR tab. Enter the information described in Search for an Element in the chapter "Performing CA Endeavor SCM File and Element Actions." If this is a promotion package, then only the ENDEVOR tab is available.

Then click Search.

The results page includes tabs that describe the options available for each element action.

3. Select the element action for which you want to generate SCL, select the action that you want to perform (Add, Update, Move, Transfer, Retrieve, Delete, Signin, Generate), and then click Generate. If this is a promotion package, then only the Move action is available.

The SCL is generated.

- **If the SCL generation is successful:** The SCL stream is attached to the package.

To save the generated SCL as part of the package, click Modify on the Edit SCL page, or click Create on the Package Create page.

Generated SCL statements are appended to already existing SCL statements.

- **If the SCL generation results in an error:** An error page opens. After you determine the nature of the error and correct it, return to the originating page and click Generate again.

Cast a Package

When you cast a CA Endeavor SCM package, you prepare it for approval. Once a package is cast, you can no longer edit it. A package must be in the In-Edit state to be eligible for casting. After you cast the package, it is either In-Approval (if approval is required) or Approved (if approval is not required). You cast packages from the CA Endeavor SCM Package Search page.

To cast a package

1. Enter search criteria to find packages in the In-Edit state and then click Search.

Note: For more information on searching for CA Endeavor SCM packages, see Search to Locate a Package.

2. Click a package name.

The CA Endeavor SCM Package Detail page opens.

3. Click Cast.

The CA Endeavor SCM - Cast Successful message displays in the Details area.

4. Do *one* of the following:

- **To display additional information:** Click the first link, "Click here for additional information."

The CA Endeavor SCM Cast Report opens.

- **To verify the updated status of the package:** Click the second link, "Click here to continue."

The CA Endeavor SCM Package Detail page opens.

Approve a Package

When you approve a CA Endeavor SCM package, you change its status from In-Approval to Approved, making it eligible to be executed. The Home page includes a list of projects awaiting your approval. You can approve or deny any package listed on your Home page.

To approve a package

1. Click one of the packages in the Awaiting Approval state.

The CA Endeavor SCM Package Detail page opens.

2. Click Approve.

The CA Endeavor SCM - Approval Successful message displays in the Details area.

3. Click the second option, "Click here to continue."

The CA Endeavor SCM Package Detail page opens, and the package status now shows as Approved.

Execute a Package

When you execute a CA Endeavor SCM package, CA Endeavor SCM performs the actions contained in the package. To be eligible for execution, a package must be in the Approved state. During execution, the package state changes to In-Execution. Depending on the results of the execution, the package state is then changed to either Executed or Exec-Failed.

Note: For more information on searching for CA Endeavor SCM packages, see Search to Locate a Package.

To execute a package

1. Enter search criteria on the CA Endeavor SCM Package Search page to find packages in the Approved state and then click Search.

The page displays search results.

2. Click a package name.

The CA Endeavor SCM Package Detail page opens.

3. Review the package information.

4. Click Execute.

The CA Endeavor SCM - Execution Successful message displays in the Details area.

5. Do *one* of the following:

- **To display additional information:** Click the first link, "Click here for additional information."

The CA Endeavor SCM Package Execution Report opens.

- **To verify the updated status of the package:** Click the second link, "Click here to continue."

The CA Endeavor SCM Package Detail page opens.

Back Out a Package

When you back out a CA Endeavor SCM package, you restore the executable and output modules to the state they were in prior to execution. To be eligible for backout, a package must be in either Executed or Exec-Failed state, and must have backout records. You back out packages from the CA Endeavor SCM Package Search page.

To back out a package

1. Enter search criteria to find packages in the Executed state and then click Search.

The search results display packages in the Executed and Exec-Failed states.

2. Click a package name.

The CA Endeavor SCM Package Detail page opens.

3. Review the package information and then click Backout.

The CA Endeavor SCM - Backout Successful message displays in the Details area.

Note: For more information on searching for CA Endeavor SCM packages, see Search to Locate a Package.

Back In a Package

When you back in a CA Endeavor SCM package, you reverse the backout action. To be eligible for backin, a package must be in Executed state and be backed out. You back in packages from the CA Endeavor SCM Package Search page.

Note: For more information on searching for CA Endeavor SCM packages, see Search to Locate a Package.

To back in a package

1. Enter search criteria to find packages in the Executed state and then click Search.

The search results displays packages in the Executed state.

2. Click a package name.

The CA Endeavor SCM Package Detail page opens.

3. Review the package information and then click Backin.

The CA Endeavor SCM - Backin Successful message displays in the Details area.

Ship a Package

When you ship a package, the package outputs or package backout members are transmitted from a host site to another site. To use this feature, the API SCL Package Ship feature must be enabled at the CA Endeavor SCM host site and a destination must be defined in the host site for each remote site to which you plan to ship a package. A package is eligible to be shipped if the package status is executed (the package has been successfully executed) and backout records exist for this package. Backout records are automatically created at the time of execution if the package was defined with the backout enabled option set to Y.

To ship a CA Endeavor SCM package

1. Select the CA Endeavor SCM Package Detail page for the package you want to ship.

If the API SCL Package Ship feature is enabled, a destination has been defined at the host site, and the package is eligible to be shipped, the Ship button will be shown along with the destination options and the ship options.

2. Select the desired destination and ship option. Click the Ship button.

The Ship option Package allows you to ship the package outputs of a successfully executed package to a remote location. The Backout option allows you to ship the backout members if you need to back out the package outputs, after you have completed shipping a package with the Package option. The package is submitted to the CA Endeavor SCM host site for Package Ship action and the Package Ship Action Result page is displayed. This page shows the return code for this package ship submit action.

Note: You will receive an email notification indicating that the package has been submitted to the CA Endevor SCM Package Ship utility, provided the email notification feature for Package Ship is enabled at the CA Endevor SCM host site. The details of the package ship process are not accessible through CA CM Enterprise Workbench; however, a package ship record will be created in CA Endevor SCM to summarize the package ship process.

3. Click in the Package Ship Action Result page to continue.

The CA CM Enterprise Workbench Home page opens.

4. To see if the Package Ship action has completed processing, select the CA Endevor SCM Package Detail page for the package you had submitted and click on the Package Ship History link in the Additional Reports section of the Package Detail page.

The CA Endevor SCM Package Ship History page displays to show the records of past Package Ship actions. Your ship action will be displayed here only after it has completed processing.

Note: If you need to check the status of a Package Ship action that is in progress, you will find this information on the mainframe.

To ship multiple CA Endevor SCM packages

1. To search for eligible packages, select the CA Endevor SCM Package Ship Search page in page locator.

The Package Ship Search page opens.

2. Enter a search string (asterisks (*) are allowed) and click the Search button.

The Select CA Endevor SCM Package To Ship page opens and shows a list of eligible packages that match your search string, along with the destinations and ship options for each package.

3. For each package you want to ship, select the package, along with desired destination and ship option. Then click the Ship button.

All the packages you selected are submitted to the CA Endevor SCM Package Ship utility and the Package Ship Action Result page is displayed. This page shows the return code for each package ship submit action.

Commit a Package

When you commit a CA Endevor SCM package, you remove all backout or backin data but retain package event information. To be eligible for commitment, a package must be in the Executed state. You commit packages from the CA Endevor SCM Package Search page.

Note: For more information on searching for CA Endevor SCM packages, see Search to Locate a Package.

To commit a package

1. Enter search criteria to find packages in the Executed state and then click Search.

The search results display packages in the Executed state.

2. Click a package name.

The CA Endeavor SCM Package Detail page opens.

3. Review the package information.

4. Click Commit.

The CA Endeavor SCM - Commit Successful message displays in the Details area.

Reset a Package

When you reset a CA Endeavor SCM package, you change its status to In-Edit. You reset packages from the CA Endeavor SCM Package Search page.

Note: For more information on searching for CA Endeavor SCM packages, see [Search to Locate a Package](#).

To reset a package

1. Clear all search criteria on the CA Endeavor SCM Package Search page and then click Search.

Search results are displayed.

2. Click a package name.

The CA Endeavor SCM Package Detail page opens.

3. Review the package information and then click Reset.

The CA Endeavor SCM - Reset Successful message displays in the Details area. Backout and approval information is also reset.

Delete a Package

When you delete a CA Endeavor SCM package, you remove the package from CA Endeavor SCM. To be eligible for deletion, a package can be in any status. You delete packages from the CA Endeavor SCM Package Search page.

Note: For more information on searching for CA Endeavor SCM packages, see [Search to Locate a Package](#).

To delete a package

1. Enter search criteria to find the packages you want to delete and then click Search.

Search results are displayed.

2. Click a package name.

The CA Endevor SCM Package Detail page opens.

3. Review the package information and then click Delete.

The CA Endevor SCM - Deletion Successful message displays in the Details area.

Chapter 5: Performing CA SCM Package Processes

More Information on Package Processing

Use this chapter in conjunction with the *CA Software Change Manager User Guide* and the *CA Software Change Manager Administrator Guide*.

View Detailed Package Information

You can view detailed information about a package on the Harvest Package Detail page. You can access this page in two ways:

- By opening the Harvest Package Detail page from the Home page
- By using the Locator menu

To open the Harvest Package Detail page from the Home page

Click a CA SCM package name under the Awaiting Approval heading.

To open the Harvest Package detail page from anywhere in CA CM Enterprise Workbench

1. Click the Locator menu and select Harvest Package List.
The Harvest Package List page opens.
2. Enter search criteria and then click a CA SCM package link.
The Harvest Package Detail page opens.

Harvest Package Detail Page

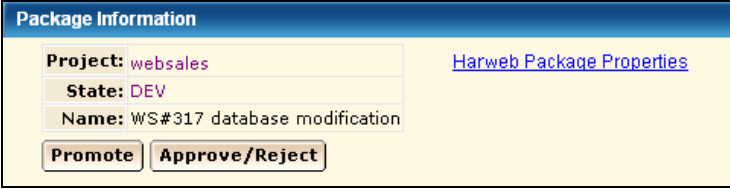
The Harvest Package Detail page lists information about a selected package, including the following:

- Package information
- Associated form
- Associated versions

- Package approval information
- Package history

Package Information

This area displays the project associated with the package, the current state of the package, and the package name. For example:



The screenshot shows a 'Package Information' box with a blue header. Inside, there are three rows of information: 'Project: websales' with a link 'Harweb Package Properties' to its right, 'State: DEV', and 'Name: WS#317 database modification'. At the bottom are two buttons: 'Promote' and 'Approve/Reject'.

Package Information	
Project: websales	Harweb Package Properties
State: DEV	
Name: WS#317 database modification	
<button>Promote</button>	<button>Approve/Reject</button>

Links

The Package Information area contains the following links:

Project

Opens the Harvest Project Information page, which displays the states associated with the project.

State

Opens the Harvest Package List page, which displays the packages associated with the current project that are in the same state as the current package.

Harweb Package Properties

(Optional.) Opens the Harvest Package Properties page.

Note: For more information about this link, see Additional CA SCM Activities.

Buttons

Process buttons let you perform package processes. The buttons displayed depend on the state of the CA SCM package and whether it is part of an Enterprise package. Possible process buttons include the following:

Promote

Opens the Harvest Promote Package page. This page identifies whether the package was approved, rejected, or needs approval. It lets you add the package to the list of packages to be promoted to the next state.

Demote

Opens the Harvest Demote Package page. This page identifies if the package is approved, rejected, or needs approval. It lets you add the package to the list of packages to be demoted.

Approve/Reject

Opens the Harvest Approve/Reject Package page, where you can add comments and either approve or reject the package.

Note: For more information about approving CA SCM packages, see Approve CA SCM Packages.

Associated Form

This area displays forms associated with a package. For example:

Associated Form	
Form	Form Type
Change Description	Comment

When you click the link in the Form column, the Harvest Form Details page opens. This page displays information about the form, such as the form type.

Associated Version

This area displays the item versions associated with the CA SCM package. For example:

Associated Version					
User	Date/Time(GMT)	Status	Version	Item	Path Name
harvest	2005-04-10 13:27:43.0	Normal	1	servlet546.jsp	\QAREPOS
harvest	2005-04-10 13:27:43.0	Normal	1	txtfile546.txt	\QAREPOS
Total Number of Versions: 2 Normal: 2 Reserved: 0 Merged: 0 Removed: 0					

Version information includes the following:

User

Identifies the user ID of the user who created the version. When you click the link, the Harvest User Details page opens. This page displays information about the user who created the item version, including the name (CA SCM or CA Endeavor SCM ID), full name, telephone number, telephone extension, fax number, and email address. Clicking Done returns you to the previous page.

Date/Time (GMT)

Identifies the creation date and time, expressed as Greenwich Mean Time.

Status

Identifies the status of the item: Normal, Reserved, Merged, or Removed.

Version

Identifies the version number of the item.

Item

Identifies the name of the file associated with the item.

Path Name

Identifies the directory path where the file is stored.

Package Approvals

This area displays the approvals needed or granted that are associated with a package. For example:

Package Approvals			
User/User Group	Action	Date/Time(GMT)	By
harvest	Approved	2005-04-10 13:28:35.0	

Approval information includes the following:

User/User Group

Identifies the name of the approver group associated with the package, or the user ID of the approver.

When you click the link, either the Harvest User Details page or the Harvest User Group Details page opens. Both pages provide information about the users associated with package, including user ID, name, telephone number, and telephone extension. The Harvest User Details page also includes the user's fax number and email address. Clicking Done returns you to the previous page.

Action

Identifies the action performed: Needs Approval, Approved, or Rejected.

Date/Time (GMT)

Identifies the date and time of the action, expressed as Greenwich Mean Time.

By

Identifies the name of the user or user group that performed (or needs to perform) the action.

Package History

This area shows a history of package actions. For example:

Package History			
User	Date/Time(GMT)	Action	State
harvest	2005-04-10 13:25:45.0	Created	DEV
harvest	2005-04-10 13:28:35.0	Approved	DEV

History information includes the following:

User

Identifies the user ID of the user associated with the package action.

Clicking this link opens the Harvest User Details page, which displays user ID, name, telephone number, telephone extension, fax number, and email address. Clicking Done returns you to the previous page.

Date/Time (GMT)

Identifies the date and time of the action, expressed as Greenwich Mean Time.

Action

Identifies the action performed: Created, Approved, Promoted, or Demoted.

State

Identifies the package's state.

CA SCM Package Processes

CA SCM packages normally travel sequentially from one state to the next in a life cycle; for example, Development to Unit Test, Unit Test to QA, QA to Production. Using CA CM Enterprise Workbench, you can promote a package to the next state or, if necessary, demote it to a previous one. You can also approve or reject a package so that it can be promoted or demoted.

Specifically, you can perform the following operations on CA SCM packages:

- Approve a package
- Promote a package
- Demote a package
- View approver information

Note: For more information about CA SCM package processes, see the *CA Software Change Manager User Guide* and the *CA Software Change Manager Administrator Guide*.

Approve CA SCM Packages

In defining a CA SCM life cycle, you can specify that the approval process is required before a package can be promoted to a higher state. You can also designate who must perform the approval process: one or more users, a user group, or both. When the designated approver is a user group, one user who is a member of that group can approve the package.

CA CM Enterprise Workbench lets you approve a single package or a list of packages in one action.

Approve a Single CA SCM Package

The CA CM Enterprise Workbench Home page includes a list of projects awaiting your approval. You can approve or reject any project listed on your Home page.

To approve a single project

1. Click a package name under the Awaiting Approval heading.

The Harvest Package Detail page opens. In the following example, package WS#317 was selected.



The screenshot shows a web form titled "Package Information" with a blue header. Below the header, there are three input fields: "Project:" with the value "websales", "State:" with the value "DEV", and "Name:" with the value "WS#317 database modification". At the bottom of the form, there are two buttons: "Promote" and "Approve/Reject".

Package Information	
Project:	websales
State:	DEV
Name:	WS#317 database modification
Promote Approve/Reject	

- Click Approve/Reject.

The Harvest Approve/Reject Package page opens. For example:

	Package Name	Approved	Rejected	Needed
☒	WS#363 document sales cycle	0	0	1

Enter approval/rejection comments in the space below:

Approve Package Approve Reject

- Verify that the check box for the package is selected.
- Enter any approval comments in the text box.
- Click Approve.

The Harvest Approval Successful message displays in the Details area.

After all necessary approvals are granted, the package is ready to be promoted to the next state.

Note: The To State does not apply for approval processing.

If the approval fails, the system displays return codes and associated reasons.

Approve Multiple CA SCM Packages

CA CM Enterprise Workbench lets you approve or reject multiple CA SCM packages in one action.

To approve multiple projects

- Click the name of one of the packages you want to approve under the Awaiting Approval heading.

The Harvest Package Detail page opens.

- Click Approve/Reject.

The Harvest Approve/Reject Package page opens.

- Verify that the check box of the selected package is checked.

4. Click Add To List.

The Harvest Add to Package List page opens. The package is selected and added to the list of packages awaiting approval, as shown in the following example:

☒	Package Name
☒	WS#349 DOC update
☐	WS#158 correct for database changes
☐	WS#204 change headers
☐	WS#219 web page changes
☐	WS#258 update for price changes
☐	WS#317 database modification
☐	WS#363 document sales cycle
☐	WS#389 add db table
☐	WS#463 Change Cursor Tab order
☐	WS#510 Program Optimization
☐	WS#546 Update for Usability DAR
☐	WS#625 Animate Web Page
☐	WS#664 correct API call error
☐	WS#706 update for Sales Tax change

5. Select any other packages that you want added to the package list by selecting the check boxes.

6. Click Update.

The Harvest Approve/Reject Package page opens, listing all of the selected packages.

☒	Package Name	Approved	Rejected	Needed
☒	WS#349 DOC update	0	0	1
☒	WS#363 document sales cycle	0	0	1

Enter approval/rejection comments in the space below:

Approve Package

7. Enter any approval comments in the text box.

8. Click Approve.

If you approved all of the packages, the Harvest Approval Successful page opens, confirming that the approval process is complete for all of the selected packages.

Note: The To State does not apply to approval processing.

Promote CA SCM Packages

After approving a CA SCM package, you can promote it to the next state in its life cycle. Similarly to the approval process, CA CM Enterprise Workbench also lets you promote or demote a single package or a list of packages in one step.

To promote one or more packages

1. Click the project name of the CA SCM project that includes the packages that you want to promote. CA SCM projects are listed under the My Projects heading.

The Harvest Project Information page opens, displaying the states associated with the project you selected. An example for the websales project follows.

Project Name: websales	
State Name	
DEV	
QA	
PROD	
ECCMQA	

- Click the link for the state that contains the packages you want to promote.

The Harvest Package List page opens, listing the packages that are in the selected state. For example:

Project Information			
Name: websales			
State: DEV			
Packages			
☐	Package Name	Created On	Created By
☐	WS#158 correct for database changes	2005-04-10 12:16:06.0	harvest
☐	WS#204 change headers	2005-04-10 12:19:59.0	harvest
☐	WS#219 web page changes	2005-04-10 12:21:52.0	harvest
☐	WS#258 update for price changes	2005-04-10 12:25:43.0	harvest
☐	WS#317 database modification	2005-04-10 12:29:48.0	harvest
☐	WS#349 DOC update	2005-04-10 12:32:25.0	harvest
☐	WS#363 document sales cycle	2005-04-10 12:41:47.0	harvest
☐	WS#389 add db table	2005-04-10 13:16:54.0	harvest
☐	WS#463 Change Cursor Tab order	2005-04-10 13:19:23.0	harvest
☐	WS#510 Program Optimization	2005-04-10 13:21:18.0	harvest
☐	WS#546 Update for Usability DAR	2005-04-10 13:25:45.0	harvest
☐	WS#625 Animate Web Page	2005-04-10 13:29:07.0	harvest
☐	WS#664 coorect API call error	2005-04-10 13:57:30.0	harvest
☐	WS#706 update for Sales Tax change	2005-04-10 13:59:06.0	harvest
Packages in this state: 14			
Approve/Reject Use this process to approve one or more packages. This process can also be used to reject a package and put it on hold.			
Promote Package to QA			

- Select the package or packages you want to promote.
- Click the Promote Package to *state* link, at the bottom of the page.

Note: If the state has multiple promotion processes defined, the Harvest Package List Page displays multiple Promote links.

CA CM Enterprise Workbench confirms that the promotion succeeded. If any errors are encountered, the promotion fails and CA CM Enterprise Workbench displays an explanatory error message.

Demote CA SCM Packages

If necessary, you can demote a package that you previously promoted using the Demote process. When you demote a package, you move it from its current state to a previous state in its life cycle.

To demote one or more packages

1. Click the project name of the CA SCM project that includes the packages that you want to demote. CA SCM projects are listed under the My Projects heading.

The Harvest Project Information page opens, displaying the states associated with the project you selected.

2. Click the link for the state that contains the packages you want to demote.

The Harvest Package List page opens, listing the packages that are in the selected state.

3. Select the package or packages you want to demote.
4. Click the Demote Package to *state* link, at the bottom of the page.

Note: If the state has multiple promotion processes defined, the Harvest Package List Page displays multiple Demote links.

CA CM Enterprise Workbench confirms that the demotion succeeded. If any errors are encountered, the demotion fails and CA CM Enterprise Workbench displays an explanatory error message.

Additional CA SCM Activities

CA SCM contains functionality not available in CA CM Enterprise Workbench. If the Harweb interface is enabled for a data source, from a package's Harvest Package Detail page, you can open the Harvest Package Properties page in Harweb. On the Properties page you have access to versions, history, approvals, forms, and package groups.

Note: If the Harweb interface is enabled, CA CM Enterprise Workbench provides direct access to additional processes and activities available throughout Harweb. You can tell if the interface is enabled by opening the Locator drop-down menu; if the option Harvest Web Interface is on the menu, the interface is enabled for the data source.

To view CA SCM package properties

On the Harvest Package Details page, click the Harweb Package Properties link.

The screenshot shows a 'Package Information' box with the following details: Project: websales, State: DEV, Name: WS#317 database modification. There is a link 'Harweb Package Properties' and two buttons: 'Promote' and 'Approve/Reject'.

The Harvest Package Properties page appears.

The screenshot shows the 'Package Properties' page. It has a navigation bar with 'Project | Package | Form | View | File | Logout' and a search bar. The left sidebar shows 'Current Context' with 'Project: PRJ1', 'State: Development', 'Package: N/A', and 'Default View Path: \'. The main area is titled 'Properties - p1' and has tabs for 'Properties', 'Versions', 'History', 'Approval', 'Description / Note', 'Forms', and 'Package Groups'. The 'Properties' tab is active, showing fields for 'Package Name: p1', 'Assignee: harvest', 'Creator Name: harvest', 'Last Modifier Name: harvest', 'Creation Date: 2/2/05 2:12 PM', and 'Modified Date: 2/7/05 11:00 AM'. There are 'Delete', 'Save', and 'Cancel' buttons.

On this page you can view all of the package information, including forms attached to the package.

By selecting Package from the menu, you can access all of the processes defined in Harweb that apply to the package.

From the Locator menu, you can also jump to the Harvest Package List facility, set up any context you want, view reports about your projects, check in and check out files associated with a package, and perform all CA SCM processes for which you are authorized. You have full access to the capabilities of Harweb through CA CM Enterprise Workbench.

When you complete the various activities you want to perform, you can return to your original CA CM Enterprise Workbench page or to your Home page using the common menu links.

Chapter 6: Working With Enterprise Packages

Enterprise Packages

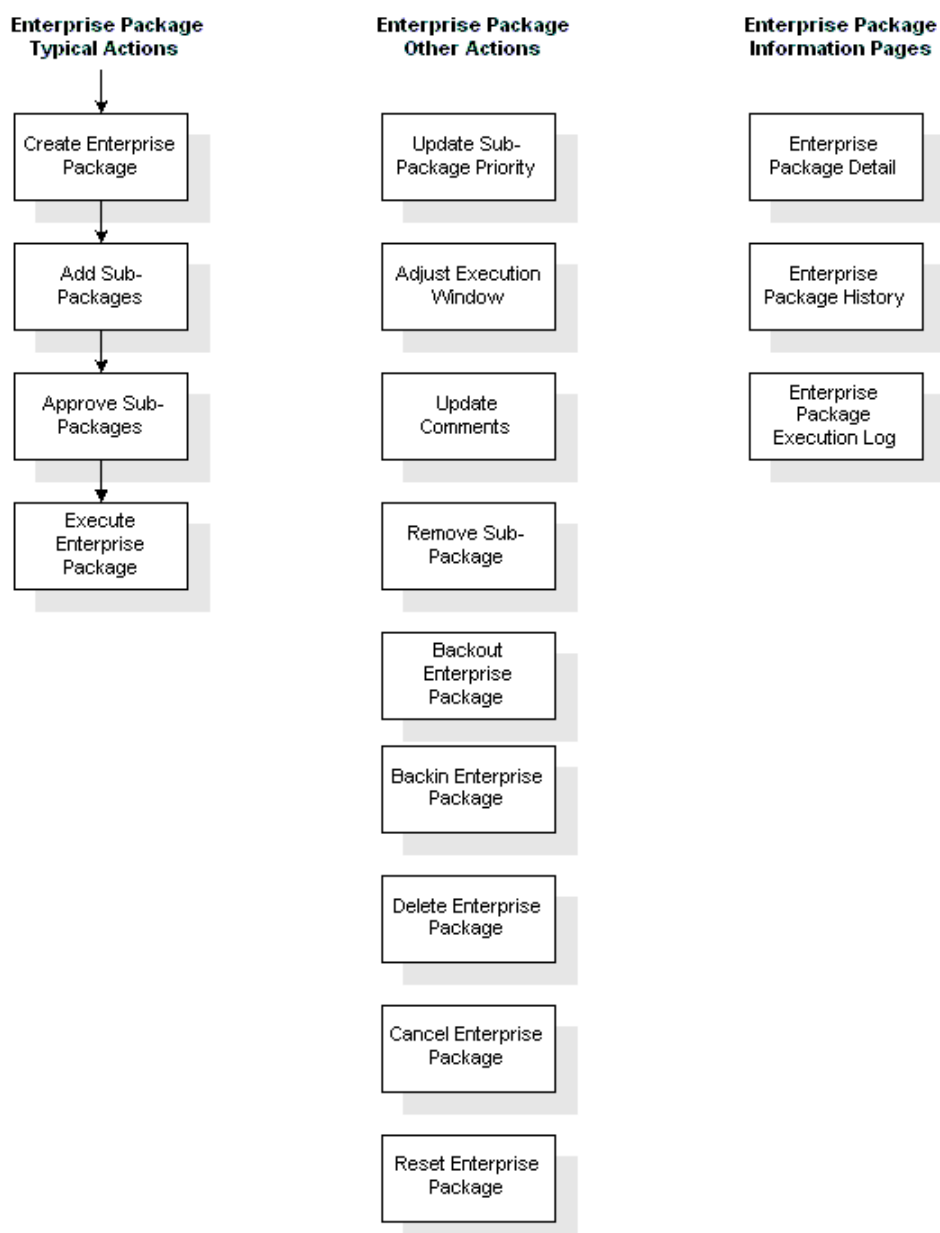
An *Enterprise package* is a super-package, containing one or more CA Endeavor SCM packages, one or more CA SCM packages, or a combination of both. Enterprise packages let you group related change packages and control the order in which they are processed. By combining multiple packages into a single Enterprise package, you can associate related change packages and manage them as a single unit to help ensure that they are synchronized appropriately throughout their life cycle.

Enterprise packages require that all component packages be in the Approved state before any one of them can be executed. If a package fails, none of the subsequent packages in the Enterprise package are executed. When this happens, CA CM Enterprise Workbench lets you back out the packages that are already executed.

After a sub-package is included in an Enterprise package, it is under the control of the Enterprise package facility, and the actions that can be performed using it are restricted.

Enterprise Package Actions and Pages

The following diagram shows the typical actions in an Enterprise package life cycle, as well as other Enterprise package actions and supplementary Enterprise package information pages. Each item is discussed in detail in this chapter.



Create an Enterprise Package

When you create an Enterprise package, you build a container to encompass the sub-packages you will add to it. Enterprise packages are specific to an Enterprise configuration. A configuration is a specific host and broker pair entered on the login page at the beginning of a session.

Enterprise packages that you create are automatically included in the list of Enterprise packages on the Home page. Any user logged in to the same configuration can also view these Enterprise packages.

To create an Enterprise package

1. Click the Locator drop-down menu and select Enterprise Package Create.
The Create Enterprise Package page opens.
2. Enter a name for the new package in the Name field.
Note: The package name can be up to 32 characters long and is changed to uppercase. CA CM Enterprise Workbench automatically enforces capitalization during data entry.
3. Enter any comments associated with the package in the Comments field.
Note: You may enter up to 80 characters in uppercase or lowercase.
4. Click Create.
The Enterprise Package Detail page opens.

Enterprise Package Detail Page

The Enterprise Package Detail page displays details about a particular Enterprise package.

General Information						
Name: EP1000						
Execution Status: Idle						
Package Status: Initial						
Last Action: None						
Comment					Update	
Comment: Test Enterprise package comment						
Execution Window						
	YYYY	MM	DD	hh	mm	
Begin:	2005	4	10	14	19	
End:	2005	4	10	14	19	
Sub-Packages					Add Endeavor	Add Harvest
Package Name	Execution Status	Package Status	Last Action	B/O	Priority	
Additional Reports						
History						
Execution Log						

This page contains the following fields:

Name

Indicates the name of the Enterprise package.

Execution Status

Identifies the status of the Enterprise package relative to the Executor. The execution status reflects what is happening to the Enterprise package at the time the Enterprise Package Detail page is opened. Status options include Idle, Submitted, Running, or Cancel. Initially, the execution status is Idle.

Package Status

Identifies the status of the Enterprise package. Options include Initial, In-Approval, Ready-to-Execute, Execution Successful, Execution Failed, or Canceled. Initially, the Package Status is Initial.

Last Action

Displays the most recent action performed on the Enterprise package. Initially, Last Action is None.

Comment

Defines a comment about the package. To edit the comment, change the text and click Update.

Execution Window Begin/Execution Window End

Defines the dates and times that these package actions can be performed. Initially the system sets these parameters to reflect the date and time that the Enterprise package was created. You can edit these fields if you want.

YYYY

Defines the year for the beginning or ending of the package execution window.

MM

Defines the month for the beginning or ending of the package execution window.

DD

Defines the date for the beginning or ending of the package execution window.

hh

Defines the hour of the beginning or ending of the package execution window.

mm

Defines the minute of the beginning or ending of the package execution window.

B/O

Indicates whether the package can be backed out.

Priority

Indicates the priority of the package.

Package History

When you create an Enterprise package, CA CM Enterprise Workbench records a history entry. If you scroll to the bottom of the page, you can view this information by clicking the History link in the Additional Reports area.

You can also view package history from the Enterprise Package History Search page, which you can open from the Locator drop-down menu.

Note: For more information on package history, see View Enterprise Package History

CA Endeavor SCM Sub-package Considerations

After you create an Enterprise package, the next step is to add sub-packages to it. When you add a CA Endeavor SCM sub-package to an Enterprise package, the following considerations apply:

- The sub-package becomes correlated with the Enterprise package. When correlated, the actions that can be performed against the sub-package outside the Enterprise package are restricted.
- The sub-package is validated to verify that it complies with the execution window.
- The addition of the sub-package can change the Enterprise package status.
- A history entry is created.
- You can add a promotion package to an enterprise package. However, the following considerations apply:
 - A mix of promotion packages and non-promotion packages is not allowed in one enterprise package.
 - The promotion packages must have the same target location at any place of the life cycle at the time when they are added.

Note: For more information, see Processing Logic.

Add a CA Endeavor SCM Sub-package to an Enterprise Package

Note: To add a CA Endeavor SCM sub-package to an Enterprise package, you must be logged in to CA Endeavor SCM.

You add CA Endeavor SCM sub-packages to an Enterprise package using the Enterprise Package Detail page.

To add a CA Endeavor SCM sub-package to an Enterprise package

1. Scroll down to the Sub-Packages area and click Add Endeavor.

The Add Endeavor Package to Enterprise Package page opens. This page provides a search facility that lists CA Endeavor SCM packages eligible for inclusion in an Enterprise package.

2. Enter your search criteria. You can use wildcard (*) or placeholder (%) characters when you enter a package name in the Endeavor packages to list field.

Note: To be added to an Enterprise package, CA Endeavor SCM packages must have a status of In-Edit, In-Approval, or Approved, and cannot already be part of another Enterprise package.

3. Click Search.

The system displays CA Endeavor SCM packages that match your search criteria, as shown in the following example:

Enterprise Package Name: TEST ENT				
☐	Package	Status	Description	Type
☐	TEST	IN-EDIT	TEST - COMMENT	STANDARD
☐	TESTB	APPROVED	B	STANDARD
☐	TESTD	APPROVED	D	STANDARD
☐	TESTE	APPROVED	E	STANDARD
☐	TESTF	APPROVED	D	STANDARD

4. Select check boxes of the sub-packages you want to add.
5. Click Update.

The Enterprise Package Detail page redisplay. You can now view the list of sub-packages that were added, as shown in the following example:

General Information							
Name: TEST ENT							
Comment: Test Enterprise package.							
Execution Status: Idle							
Package Status: Ready-to-Execute							
Last Action: None							
Execute Reset							
Execution Window						Update	
	YYYY	MM	DD	hh	mm		
Begin:	2005	9	1	00	00		
End:	2079	12	31	00	00		
Sub-Packages						Add Endeavor	Add Harvest
☐	Package Name	Execution Status	Package Status	Last Action	B/O	Priority	
☐	TESTD	Idle	APPROVED		E	10	
☐	TESTE	Idle	APPROVED		E	20	
☐	TESTF	Idle	APPROVED		E	30	
Remove SP						Update SP	

When you add a CA Endeavor SCM package to an Enterprise package, a history entry is created in the History report. You can view history by selecting Enterprise Package History Search from the Locator drop-down menu.

CA Endeavor SCM Sub-package Approval

Before an Enterprise package can be executed, all the CA Endeavor SCM sub-packages included in it must be approved (their package status must be Approved).

When all CA Endeavor SCM sub-packages have an Approved status, the Enterprise package status becomes Ready-to-Execute.

Note: For more information on approving packages, see the chapter “Performing CA Endeavor SCM Package Actions.”

Processing Logic

When you add a sub-package to an Enterprise package, CA CM Enterprise Workbench applies the following processing logic:

- If you attempt to add a package that has an execution window that conflicts with the execution window associated with the Enterprise package, CA CM Enterprise Workbench returns an error and does not add the package. An Error Detected link displays at the top of the page. Click this link to open a window that displays the error message.
- If you add a package with an execution window that is more restrictive than the Enterprise package execution window, then the Enterprise package execution window is revised to the more restrictive parameters.

For example, if you add a CA Endeavor SCM sub-package with a beginning execution window date of May 1, 2005, and an ending execution window date of December 23, 2005, to an Enterprise package with a beginning execution window date of March 1, 2005, and an ending execution window date of December 31, 2005, the execution window dates for the Enterprise package are revised to May 1, 2005 (beginning), and December 23, 2005 (ending).

Execution Window					
	YYYY	MM	DD	hh	mm
Begin:	2005	5	1	00	00
End:	2005	12	23	00	00

- The Enterprise package status can change. For example, let's assume that an Enterprise package includes five sub-packages that are Approved. If you add a sub-package that is In-Approval, the status of the Enterprise package changes from Ready-to-Execute to In-Approval.

- Promotion packages are processes as follows: The correlation action is performed when the Add Endevor button is clicked on the Enterprise Package Detail page. Correlated packages must have the same environment and stage target. However, validation of environment and stage targets does not occur when packages are added to an enterprise package. Validation occurs prior to the execution of the enterprise package. The Execute button is visible only if all packages are approved and all correlated packages have the same target environment and stage combination. The Sub-Packages section of the Enterprise Package Detail page can be used to identify the target environment and stage of all the correlated promotion packages.

CA SCM Sub-package Considerations

When you add CA SCM sub-packages to an Enterprise package, the following considerations apply:

- For CA SCM r7, if you have implemented CA SCM Enterprise package locking, the processes that can be performed against a package are restricted in both CA CM Enterprise Workbench and CA SCM. Conceptually, this is similar to correlation in CA Endevor SCM.
- A history entry is created.

Add a CA SCM Sub-package to an Enterprise Package

Note: To add CA SCM sub-packages to Enterprise packages, you must be logged in to CA SCM and be a member of a user group named with the ECCM or EW prefix.

You add CA SCM sub-packages to an Enterprise package using the Enterprise Package Detail page.

To add a CA SCM sub-package to an Enterprise package

1. Scroll down to the Sub-Packages area and click Add Harvest.

The Add Harvest Package to Enterprise Package page opens. This page provides a search facility that displays CA SCM packages eligible for inclusion in an Enterprise package.

2. Click Select Project, and select the CA SCM project that contains the packages you want to add to the Enterprise package.

The project link is displayed, and the Select State menu appears.

Note: For CA SCM r7, all states having promotion processes defined appear on the menu.

- Click Select State and select the state of the packages you want to add.

The CA SCM packages that meet the search criteria are displayed in the Harvest Process and Packages area, as shown in the following example:

Enterprise Package Name: TEST ENT Cancel

Selected Project: testing
Selected State: Requirements

Harvest Process and Packages Update

Select Harvest Process	Note
☒ Promote to Project Documentation	This process is used to promote packages that are ready for documentation to the Project Document state. To select packages for promotion, select the packages on the Workbench before invoking this process, or use the Package Chooser within the process window. Only the Documentation Manager can perform this process.
☐ Promote to Rapid Prototype (code)	This process is used to promote packages that are ready for coding to the Rapid Prototype (code) state. To select packages for promotion, select the packages on the Workbench before invoking this process, or use the Package Chooser within the process window. Only the Development Manager can perform this process.
☐ Promote to Test Scripts	This process is used to promote packages that are ready for test scripts to be developed to the Test Scripts state. To select packages for promotion, select the packages on the Workbench before invoking this process, or use the Package Chooser within the process window. Only the Test Manager can perform this process.

☒ **Select Harvest Packages**

☐ TestPkg6

☐ TestPkg7

- Select a CA SCM process from those listed.

Note: Your selection determines the CA SCM state of the promotion.

- Select the check boxes of the CA SCM packages you want to add.
- Click Update.

The Enterprise Package Detail page reappears. The CA SCM sub-packages you added are listed under the Sub-Packages heading, as shown in the following example.

Sub-Packages Add Harvest						
Package Name	Execution Status	Package Status	Last Action	B/O	Priority	
☐ TestPkg6	Idle	In-Approval		Y	10	View Process Link
☐ TestPkg7	Idle	In-Approval		Y	20	View Process Link

Remove SP Update SP

When you add a CA SCM package to an Enterprise package, a history entry is created. You can view this information by clicking the History link in the Additional Reports area. You can also view history using the Enterprise Package History Search page, which you can open from the Locator menu.

View Sub-package Information

The Enterprise Package Detail page includes information about each sub-package. For example:

Sub-Packages							Add Endeavor	Add Harvest
	Package Name	Execution Status	Package Status	Last Action	B/O	Priority		
☐	 TESTD	Idle	APPROVED		E	10		
☐	 TESTE	Idle	APPROVED		E	20		
☐	 WS#098 change documentation	Idle	Initial		Y	40	View Process Link	
Remove SP					Update SP			

The Sub-Packages area includes the following information:

Package Name

Indicates the name of the CA Endeavor SCM or CA SCM sub-package.

Execution Status

Indicates the execution status of the package relative to the Executor. The execution status reflects what is happening to the package when the Enterprise Package Detail page is opened. Statuses include the following:

- Idle
- Running
- Canceled

Package Status

Indicates the life cycle status of the package:

For CA Endeavor SCM packages

The package status can be In-Edit, In-Approval, Approved, Denied, In-Execution, Success, or Failed.

For CA SCM r7 packages

The package status can be In-Approval, Approved, Denied, Success, or Failed.

Note: The In-Approval, Approved, or Denied status is shown before packages are executed, and the Success or Failed status is shown after packages are executed.

Last Action

Indicates the last action performed against the package. Initially, the Last Action field is blank. Later, the last action is Execute, Backout, or Backin.

B/O

Indicates whether the package can be backed out:

For CA Endeavor SCM packages: Valid values include:

E

Indicates the package is backout-enabled.

Y

Indicates the package is backout-enabled and also has backout records associated with it.

N

Indicates the package is not backout-enabled.

For CA SCM packages: Valid values include:

Y

Indicates that the demote process is valid for the target state. The package life cycle includes a demote process between the staging state and the target state.

N

Indicates that the demote process is not valid for the target state. The package life cycle does not include a demote process between the staging state and the target state.

Note: In CA SCM r7, if no demote process is defined in the target CA SCM state to which a package will be demoted, packages are not backout enabled.

Priority

Defines the priority associated with the package. The priority value is used by the Executor to determine the sequence in which packages are executed. Packages with the lowest priority values are executed first. The first priority is 10, and each added sub-package is incremented by 10. If you do not change the default value, then the packages are executed in the order that they were added to the Enterprise package.

For information on how to change the priority, or on running sub-packages concurrently, see [Update the Priority of a Sub-package](#).

View Process Link

Displays a link to the Sub-Package Process View page, which displays the CA SCM processes the Enterprise package uses for executing or backing out the CA SCM sub-package. An example follows.

Process View		
	Execute Process	Backout Process
State:	Requirements	Project Documentation
Process:	Promote to Project Documentation	Demote to Requirements

Update the Priority of a Sub-package

A priority is associated with every sub-package in an Enterprise package. The priority value is used by the Executor to determine the sequence in which packages are executed. Packages with the lowest priority values are executed first. By default, the first sub-package has a priority of 10. Additional sub-packages are increased by increments of 10. If you do not change the default value, then the packages are executed in the order in which they were added to the Enterprise package.

If you assign the same priority to more than one sub-package, then these sub-packages are executed simultaneously, if you have defined sufficient threads in the ew.cfg file. Sub-packages with a higher priority do not begin executing until concurrently running sub-packages have completed with an execution status of Successful.

Sub-package priority is displayed on the Enterprise Package Detail page.

To update the priority of a sub-package

Enter a new value in the Priority field, and then click Update SP, as shown in the following example:

Sub-Packages							Add Endeavor	Add Harvest
	Package Name	Execution Status	Package Status	Last Action	B/O	Priority		
☐	TESTD	Idle	APPROVED		E	10		
☐	TESTE	Idle	APPROVED		E	20		
☐	WS#098 change documentation	Idle	Initial		Y	30	View Process Link	
Remove SP				Update SP				

Package priority is updated.

Note: For more information on the Enterprise package Executor, see The Executor.

Remove a Sub-package

You use the Enterprise Package Detail page to remove a sub-package from an Enterprise package.

To remove a sub-package

Select the box next to the package name, and then click Remove SP, as shown in the following example:

☒	WS#098 change documentation	Idle	Initial		Y	30	View Process Link
<button>Remove SP</button>		<button>Update SP</button>					

When you remove a sub-package, the following actions result:

- The sub-package is *uncorrelated* from the Enterprise package.
- The Enterprise package status can be changed.

For example, assume that an Enterprise package includes five sub-packages that are Approved and one sub-package In-Approval. If you remove the sub-package that is In-Approval, the status of the Enterprise package changes from In-Approval to Ready-to-Execute.

- A history entry is created.

The Executor

CA CM Enterprise Workbench includes a program named the Enterprise package Executor that sweeps a database table to locate packages that are submitted for execution, backin, or backout. When you submit an Enterprise package, the Executor verifies the following:

- The Enterprise package status is appropriate.
- The Enterprise package is in the execution window.
- The sub-packages are in a state that allow the requested action to be performed.

If these criteria are satisfied, the Executor begins processing the Enterprise package and updates its execution status to Running. Using the Enterprise Package Execution Log, you can monitor the progress of the Enterprise package through the Executor.

The log records the execution results of each sub-package in the Enterprise package, including execution dates, times, and return codes. The log is cumulative. It is deleted when the Enterprise package is deleted.

When the Enterprise package stops running, the Executor updates the package's execution status to Idle. When you cancel an Enterprise package, its execution state becomes Idle, and the Enterprise package status is Canceled. An Enterprise package is canceled after the currently running sub-package, or group of concurrently running sub-packages, finishes running.

By default, one instance of the Executor starts when you log in to CA CM Enterprise Workbench. You can control this instance of the Executor by editing the site-wide configuration file `ew.cfg`. You can run the Executor from the command line, or start it as a *servlet*. The Executor must be active in order for Enterprise packages to run.

By running more than one execution instance, you can run more than one Enterprise package at a time. The Executor also lets you run more than one sub-package at a time by assigning sub-packages with the same priorities.

Note: For more information on setting priorities, see [Update the Priority of a Sub-package](#).

Enterprise Package History Entries

The Executor also writes entries to the Enterprise Package History page for other Enterprise package actions and events. For each history entry, CA CM Enterprise Workbench displays the associated date and time, type of activity, user ID, product, host, and sub-package name. This history remains even if the Enterprise package is deleted. You can use the Enterprise Package History Search option to retrieve this information.

Submit an Enterprise Package for Execution

An Enterprise package is eligible for execution when it has a package status of Ready-to-Execute. The package reaches this status when all of its CA Endevor SCM sub-packages have an Approved status, and all CA SCM sub-packages have an Approved status.

When an Enterprise package is Ready-to-Execute, the Enterprise Package Detail page displays the Execute button. To submit the package for execution, click Execute. CA CM Enterprise Workbench updates the execution status of the package to Submitted, as shown in the following example:

Enterprise Package Information	
Name:	EAM-EP9
Comments:	testing EP
Current Execution Status:	Submitted
Last Update:	2004-10-25

If the execution criteria listed previously are satisfied, the Executor processes the Enterprise package and updates its execution status to Running. Using the Enterprise Package Execution Log, you can monitor the progress of the Enterprise package through the Executor as described in [Review the Execution Progress of the Enterprise Package](#).

Promotion package execution is processed as follows. The Execute button is visible on the Enterprise Package Detail page, if all the promotion packages have the same target environment and stage and the packages are in Approved status. The identification of the target environment and stage ID is only possible after the promotion package has been Cast. An error message in red "Promotion packages do not have the same target environment" is displayed (on the line below the button area) if different target locations are identified. When this happens, the user must fix the error situation by removing any promotion packages that do not have the desired target locations. The Execute button is visible when all the promotion packages are ready to be executed, whether for the first or a subsequent iteration

Review the Execution Progress of the Enterprise Package

You use the Enterprise Package Detail page to open the Enterprise Package Execution Log. Whenever an Execute, Backout, or Backin of an Enterprise package is performed, the Executor writes to the Execution Log. The log records the execution results of each sub-package in the Enterprise package, including execution dates, times, and return codes. The log is cumulative. It is deleted only when the Enterprise package is deleted or reset.

To view the log

Click the Execution Log link, as shown in the following example:



CA CM Enterprise Workbench displays the Enterprise Package Execution Log page. For example:

Enterprise Package - Execution Log	
Home ENTERPRISE PACKAGE Logout	
Enterprise Package Information	
Name: EAM-EP9	
Comments: testing EP	
Current Execution Status: Running	
Last Update: 2004-10-25	
Date/Time	Message
2004-10-25 15:15:05	Enterprise Package:102(LAM-EP9) started processing(EXECUTE)
2004-10-25 15:15:06	Package:"WS#107 Change color scheme" processed. Return code:3

Note: Click the View Execution Report link on this page to view more detailed information about the package execution.

Other Enterprise Package Processes

You can perform additional Enterprise package processes, depending on the package's status. These processes include the following:

- Cancel an Enterprise package
- Back out a package
- Back in a package
- Reset a package
- Delete a package
- List Enterprise packages

These processes are described in the following sections.

Cancel an Enterprise Package

You can cancel an Enterprise package when the Execution status is Submitted or Running. The Cancel action stops execution, backout, and backin processing. It signals the Executor to stop package execution following the completion of any package that is running. In the case of concurrently running packages, all executions must complete before the cancellation takes effect. The action results in the Enterprise package status being set to Canceled.

To cancel an Enterprise package

Click the Cancel button on the Enterprise Package Detail page.

Back Out an Enterprise Package

An Enterprise package is eligible for backout when it has a package status of Execution Successful or Execution Failed, and one or more sub-packages meet the following criteria:

- A CA Endeavor SCM sub-package is backout-enabled and has backout records.
- A CA SCM sub-package's target state in the Promote process has a Demote process defined so that the package can be returned to the current state. This enables a package that is promoted to a state and demoted back to current state.

When these eligibility criteria are satisfied, the Backout button appears on the Enterprise Package Detail page.

In the case of promotion packages, packages that have executed successfully are not backed out if their status has changed to In-Edit, In-Approval, or Approval.

To back out an Enterprise package

Click Backout on the Enterprise Packages Detail page.

The backout action attempts to undo what was done when you clicked Execute. When processing an Enterprise package with the status Execution Successful, the Executor attempts to back out every sub-package. When processing an Enterprise package with the status of Execution Failed, the Executor attempts to back out every sub-package up to the package whose execution failed.

If the first failed package is part of a group of concurrently running sub-packages, the successfully run sub-packages are backed out.

When a backout succeeds, the system sets the sub-package status to Successful, and the last action to Backout. When a backout fails, the system sets the sub-package status to Failed.

The Executor writes to the Execution Log whenever you perform a backout. To view the Execution Log, click the View Execution Log link on the Enterprise Package Detail page.

Back In an Enterprise Package

An Enterprise package is eligible for backin when the last package action is Backout. The Executor attempts to back in every eligible sub-package. Conceptually, the Backin action undoes the Backout. The outcome is that the Execute action is restored.

When an Enterprise package has Backout as a last action, the Backin button appears on the Enterprise Package Detail page.

To back in an Enterprise package

Click Backin on the Enterprise Packages Detail page.

The Executor writes to the Execution Log whenever you perform a backin. To view the Execution Log, click the View Execution Log link on the Enterprise Package Detail page.

Reset an Enterprise Package

You can reset an Enterprise package at any point in its life cycle. When you reset an Enterprise package, the following happens:

- All sub-packages are removed.
- All sub-packages are disassociated and uncorrelated from the Enterprise package, making them eligible for all CA Endevor SCM actions or CA SCM processes.
- All history entries are kept.
- The Execution Log is deleted.

To reset an Enterprise package

Click Reset on the Enterprise Package Detail page.

Delete Enterprise Packages

You can delete an Enterprise package at any point in its life cycle and in any state except when it is being run by the Executor. When you delete an Enterprise package, the following happens:

- All sub-packages are removed.
- The Enterprise package row in the database is removed.
- The Enterprise package Execution Log is deleted.
- All sub-packages are disassociated and uncorrelated from the Enterprise package, making them eligible for all CA Endevor SCM actions or CA SCM processes.
- All history entries are kept.

To delete an Enterprise package

1. Click the Locator drop-down menu and select Enterprise Package Delete.
The Delete Enterprise Packages page opens.
2. Select the Enterprise packages you want to delete, and then click Delete.
The packages are deleted.

List Enterprise Packages

You can display a list of all Enterprise packages on the Enterprise Package List page.

To list Enterprise packages

Click the Locator menu and select Enterprise Package List.

The list of Enterprise packages displays, along with associated comments, as shown in the following example:

Enterprise Packages	
Package Name	Comments
TEST ENT	Test Enterprise package.
YTD-AUGUST31	year to date

To display the Enterprise Package Detail page

Click an Enterprise package link.

Enterprise Package History

CA CM Enterprise Workbench records history entries for Enterprise package actions and events. These entries let you or an auditor see historical information about system usage. The system writes a history entry when the following actions occur:

- Enterprise package is created
- Enterprise package is deleted
- Sub-packages are added to an Enterprise package
- Sub-packages are deleted from an Enterprise package
- Enterprise package is reset
- Enterprise package is submitted to the Executor
- Enterprise package is successfully executed, backed out, or backed in

The following events also create history entries when the Executor does the following:

- Cancels an Enterprise package action or submission
- Starts an Enterprise package execution
- Starts an Enterprise package backin or backout
- Enterprise package execution ends with either success or failure
- Enterprise package backin or backout fails or succeeds
- Sub-package execution starts
- Sub-package backin or backout starts

- Sub-package execution ends with either success or failure
- Sub-package backin or backout ends with either success or failure

Note: The actions Enterprise Package Reset and Cancel Submitted Enterprise Package also create history entries, but the Executor does not perform these actions. The CA CM Enterprise Workbench web application initiates these actions.

View Enterprise Package History

You can view the history of an Enterprise package from two different pages: the Enterprise Package Detail page (described elsewhere in this chapter), and the Enterprise Package History page.

To view package history from the Enterprise Package History page

1. Click the Locator drop-down menu and select Enterprise Package History Search.

The Enterprise Package History Search page opens, as shown in the following example:

2. Enter the appropriate search criteria, depending on your search method:

To search by Enterprise package

- a. Enter the Enterprise package name.

Note: You can enter one or more letters with which the package name begins, followed by a wildcard (*).

- b. Click Search.

To search by sub-package

- a. Enter the sub-package name.

Note: You can enter one or more letters with which the package name begins, followed by a wildcard (*).

- b. Enter a host or broker and a product name or select them from the drop-down lists.
- c. Click Search.

The system displays search results. In the following example, a search was performed on the Enterprise Package Name TEST ENT.

Search Result	
Enterprise Package Name:	TEST ENT
Creation Date/Time	Enterprise Package Name
2004-09-10 14:19:46	TEST ENT

3. Click the Enterprise Package name link whose history you want to view.

The Enterprise Package History page opens, as shown in the following example:

History for Package: TEST ENT					
Date/Time	Activity	User	Product	Host/Broker	Package
2004-09-10 14:19:46	Created		CMEW		TEST ENT
2004-09-10 14:44:25	Subpackage Added	USER01	ENDEVOR	cmew702	TESTD
2004-09-10 14:44:26	Subpackage Added	USER01	ENDEVOR	cmew702	TESTE
2004-09-10 14:44:27	Subpackage Added	USER01	ENDEVOR	cmew702	TESTF
2004-09-10 15:47:22	Subpackage Added	USER01	HARVEST	cmew702	WS#098 change documentation
2004-09-10 15:50:25	Subpackage Deleted	USER01	ENDEVOR	cmew702	TESTF

Note: Enterprise package names can be reused. The Enterprise Package History Search Results page displays the package name and corresponding creation date and time. Using this information, you can distinguish multiple occurrences of the same package name.

View the Impact of an Enterprise Package

You use the Impact Summary report to view the CA Endevor SCM elements and CA SCM items that are affected when you execute an Enterprise package. All sub-packages associated with an Enterprise package are scanned to identify the elements and items to be displayed on the Impact Summary report page.

Note: Follow the instructions in List Enterprise Packages to display the Enterprise Package Detail page for an Enterprise package.

To view the Impact Summary report for an Enterprise package

1. Click the Impact Summary link in the Additional Reports section at the bottom of the page.

The Enterprise Package Impact Summary page opens. An example follows.

Details Cancel								
Enterprise Package: QAACPTTEST								
Element/Type	Item	VV.LL	Version	Project	Stage	State	Package	Activity
 WEBTES10/COPYBOOK		01.00		QA2/WEBSALES/TAXES	C		GENSCL10	GENERATE
 WEBTES24/COPYBOOK		01.00		QA2/WEBSALES/TAXES	C		GENSCL10	GENERATE
 WEBTEST2/COPYBOOK		01.00		QA2/WEBSALES/TAXES	C		GENSCL10	GENERATE
 WEBTEST3/COPYBOOK		01.00		QA2/WEBSALES/TAXES	C		GENSCL10	GENERATE

2. Review the compilation of CA Endevor SCM and CA SCM information. You can click available links to access related CA Endevor SCM Element Masters.
 - **For CA SCM sub-packages:** The detailed information includes the item name, project, version, and version tag (status).
 - **For CA Endevor SCM sub-packages:** The detailed information includes the element name, project (environment, system, and subsystem), stage, type, version and level, and activity. Activities include the following:

Generate

Indicates that detailed information from the source location is *collected*.

Move

Indicates that only the source information from source location is *collected*. This information includes: project (environment, system, and subsystem), element name, version and level number.

Transfer

Indicates that detailed information from the source location is *collected*.

For all others actions

Indicates that—for Archive, Add, Copy, Delete, List, Restore, Retrieve, Signin, and Update—information is *discarded*.

How the Executor Runs as a Standalone Process

To run the Executor as a stand-alone process, you can invoke it from the Windows command prompt, as shown in the following example, assuming that you are using the same Java Virtual Machine (JVM) runtime environment as the CA CM Enterprise Workbench application. An example using the Apache Tomcat environment and Ingres JDBC driver follows.

```
cd %CATALINA_HOME%\webapps\ew\WEB-INF\classes
java -cp ".;..\lib\ew.jar;..\lib\log4j.jar;..\lib\edbc.jar"
com.ca.ew.executor.Main
```

You can start more than one instance of the Executor to concurrently process multiple Enterprise packages. The following command overrides the `Executor.instance` property value in the `ew.cfg` file and starts three instances of the Executor:

```
cd %CATALINA_HOME%\webapps\ew\WEB-INF\classes
java -cp ".;..\lib\ew.jar;..\lib\log4j.jar;..\lib\edbc.jar"
com.ca.ew.executor.Main 3
```

Note: The most common error encountered when starting the Executor from the command line is caused by failure to specify the correct class path to various `.jar` files (`-cp` option).

Chapter 7: Viewing Project Information

My Projects Area

The CA CM Enterprise Workbench Home page contains a section named My Projects. This area lists the CA Endeavor SCM and CA SCM projects that you want to monitor. For example:



CA Endeavor SCM projects are identified by this icon.



CA SCM projects are identified by this icon.

The My Projects area is completely customizable—you choose the projects that you want included in it. The first time you log in, there are no projects in the My Projects area.

Note: For more information about customizing the Home page to display your projects, see the chapter “Getting Started.”

View CA Endeavor SCM Project Information

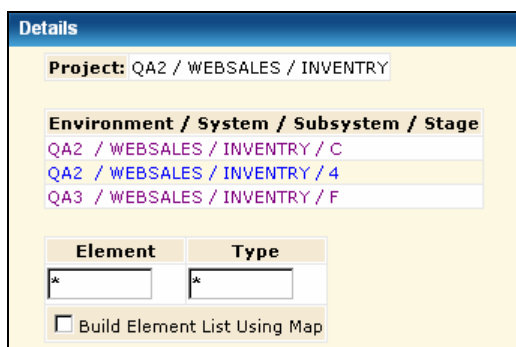
In CA Endeavor SCM, a project is a combination of the CA Endeavor SCM environment, system, and subsystem. Projects provide a convenient way to organize elements so that you can easily view and access element information.

After you customize your Home page, from the list of projects, you can access a series of CA Endeavor SCM project pages that let you choose the project, stage, and element that you want to view. You can also display actions to perform.

To view CA Endevor SCM project information

1. Click the link for the CA Endevor SCM project that you want to access under the My Projects area of the Home page.

The CA Endevor SCM Project Information page opens. In the following example, QA2/WEBSALES/INVENTORY was selected.



The screenshot shows a web interface titled "Details" with a blue header. Below the header, the "Project" is listed as "QA2 / WEBSALES / INVENTORY". Underneath, there is a section for "Environment / System / Subsystem / Stage" with three rows of data: "QA2 / WEBSALES / INVENTORY / C", "QA2 / WEBSALES / INVENTORY / 4", and "QA3 / WEBSALES / INVENTORY / F". Below this, there are two input fields labeled "Element" and "Type", each with a "*" character. At the bottom, there is a checkbox labeled "Build Element List Using Map".

Environment / System / Subsystem / Stage
QA2 / WEBSALES / INVENTORY / C
QA2 / WEBSALES / INVENTORY / 4
QA3 / WEBSALES / INVENTORY / F

Element	Type
*	*

☐ Build Element List Using Map

The Details area displays environment, system, subsystem, and stage information for the selected project.

Note: On the CA Endevor SCM Project Information page, you can do the following:

- Build a list of elements by using the environment map and selecting a stage.
- Filter the list elements by entering an Element or Type name, or both. You can enter the full name, or one or more letters with which the element or type begins, followed by a wildcard (*) character.

- Specify any filter criteria and then click an environment link.

The CA Endevor SCM Element Search page opens.

The Result area lists the elements for your selected environment, system, subsystem, and stage. If you entered filter criteria on the CA Endevor SCM Project Information page, location information and the filter criteria are shown on the ENDEVOR tab under the Search section. For example:

Endevor - Element Search endevor:user01

Home | PACKAGE | File | Element | Logout --Select a page-- Go

Result

ACTION: Retrieve | Move | Delete | Signin | Generate | Transfer | Search Again

Result: 6 elements

☐	Element Name	Type	Environment	Stage	System	Subsystem	Ver.Level	Current Date
☐	FINAPP06	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMA	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMB	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMC	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGMD	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05
☐	LOPGME	COBOL	WEBSENV1	1	WEBSALES	INVENTORY	01.00	07JAN05

Search Search

ENDEVOR

Location

Environment System Subsystem Stage Type

WEBSENV1 WEBSALES INVENTORY 1 COBOL

Element Through

Where CCID of equals

Where Processor Group equals

☒ Build Element List Using Map

If you want to change or refine your search, edit the information on the ENDEVOR tab and click Search. The system updates the Result list.

3. You can either select one or more elements and perform an action on them, or click an element to display its Element Master page:
 - **To perform actions on one or more of the listed elements:** Select the element names and then click the desired action on the ACTION menu bar.
 - **To display an element's Element Master page:** Click the link for the desired element name.

The CA Endeavor SCM Element Master page opens for the selected element. This page contains links to display Element and Component information.

Note: For more information about CA Endeavor SCM element actions, see Element Operations in the chapter "Performing CA Endeavor SCM File and Element Actions."

For more information about the CA Endeavor SCM Element Master page, see View Element Masters in the chapter "Performing CA Endeavor SCM File and Element Actions."

For a detailed description of CA Endeavor SCM display actions, see the appropriate CA Endeavor SCM documentation.

View CA SCM Project Information

In CA SCM, a *project* includes life cycle processes and data. The life cycle is the path consisting of an ordered set of phases or states that changes follow.

Note: For more information, see the chapter "Getting Started."

From the list of projects on the Home page, or from the Project Edit page, you can open a series of CA SCM project pages. These pages let you select the packages that you want to view, based on the packages' project state.

To view CA SCM project information

1. Click the link for the project that you want to access.

The Harvest Project Information page opens, displaying the states associated with the selected project.

- Click the link for the desired state.

The Harvest Package List page opens, displaying packages in the selected state. In the following example, ECCMQA is selected.

Project Information			
Name: websales			
State: ECCMQA			
Packages			
☒	Package Name	Created On	Created By
☒	WS#043 Program Headers	2005-04-09 18:33:33.0	harvest
☒	WS#057 edit to match template	2005-04-09 18:51:56.0	harvest
☒	WS#098 change documentation	2005-04-09 19:20:20.0	harvest
☒	WS#129 correct web page errors	2005-04-09 19:28:40.0	harvest
Packages locked by Enterprise Package: 4			
☐	WS#106 fix GPF on search	2005-04-09 19:24:05.0	harvest
☐	WS#107 Change color scheme	2005-04-09 19:26:20.0	harvest
Other packages in this state: 2			
	Demote to QA		
	Promote to Prod		

- Click the package name link for the CA SCM package you want to view.

The Harvest Package Detail page opens. This page includes the following information:

- The associated Enterprise package
- Associated forms
- Associated versions
- Package approvals
- Package history

Note: For more information on the Harvest Package Details page, see the chapter "Performing CA SCM Package Processes."

Chapter 8: Using Enterprise Reports

Enterprise Reporting Option

CA CM Enterprise Workbench provides a scalable, multi-tiered, distributed enterprise reporting solution. With this option, you can run predefined reports or create your own reports and integrate them into CA CM Enterprise Workbench. Enterprise Reports are available only if you selected the Reporting option during installation.

Using Predefined Enterprise Reports

Enterprise reports contain information about the status of CA CM Enterprise Workbench objects and cross-platform reports. CA CM Enterprise Workbench includes several predefined Enterprise reports presented on the Enterprise Reports page, which you can open from the Locator drop-down menu.

To run a predefined report

1. Click the Locator drop-down menu and select Enterprise Reports.

The Enterprise Reports page opens, as shown in the following example.

Details		Run
☐	Report Name	Last Run Date
☐	Enterprise Package Execution Forecast Report	
☐	Enterprise Package Execution History Report	
☐	Enterprise Package Status Report	

2. Select one or more reports listed in the Report Name column.

If a report has been run before, the day, date, and time it was last run is displayed under the Last Run Date column.

3. Click Run.

The report is created and the Enterprise Reports Results page opens. The report creation day, date, and time are listed under the Last Run Date.

- Click the link in the Report Name column to display the report page.

The following example shows the Enterprise Package Execution History Report page.

Enterprise Package Execution History Report Tue Sep 14 11:26:30 EDT 2004			
Home ENTERPRISE PACKAGE Logout		--Select a page--	Go
Configuration	Execution End Time	Execution Status	Enterprise Package Name
Packages executed on: 2004-08-09			
endeavor (E)	2004-08-09 13:36:44	Successful	TEST IT
HARV001 (H)	2004-08-09 12:46:12	Failed	TEST ENDEAVOR
Total Packages:	2	Successful: 1	Failed: 1
Packages executed on: 2004-04-01			
ABCD390 (E)	2004-04-01 10:14:55	Successful	ONE PKG
HARV001 (H)	2004-04-01 10:00:44	Failed	TEST HARVEST
Total Packages:	2	Successful: 1	Failed: 1
Packages executed on: 2004-03-31			
HARV001 (H)	2004-03-31 15:19:14	Successful	TEST HISTORY
ABCD390 (E)			
Total Packages:	1	Successful: 1	Failed: 0
Grand Total:	5	Successful: 3	Failed: 2

If the report did not generate successfully, click the View link under the Errors column on the Enterprise Reports Results page. This opens the Report Generation Errors page for the report.

Reports

The report name and the last run date and time are displayed at the top of the results page, as well as the Enterprise configuration (the CA Endeavor SCM host and CA SCM broker combination). (H) denotes the CA SCM broker; (E) denotes the CA Endeavor SCM host. Additional information for each report is described next.

Enterprise Package Execution Forecast Report

This report lists the execution details of the Enterprise packages that are candidates for execution. These Enterprise packages are in the execution window and have a package status of In-Approval or Ready-to-Execute. This report also displays the total number of packages and a grand total.

A sample Enterprise Package Execution Forecast report is shown next:

Enterprise Configuration: endeavor (Endevor)			
Enterprise Package Status	Execution Window Start	Execution Window End	Enterprise Package Name
Packages candidate for execution on: 2004-11-23			
Ready-to-Execute	2004-11-23 22:00:00	2079-12-30 22:00:00	TEST.GIFRM
Total:	1		
Grand Total:	1		
Click here to return to Enterprise Reports			

Clicking the Enterprise package name in the report opens the Enterprise Package Detail page. This page includes the following headings:

Enterprise Package Status

Indicates the status of the package; for example, In-Approval.

Execution Window Start and Execution Window End

Indicates the start and end dates and times for the package execution window.

Enterprise Package Name

Displays names of the Enterprise packages that are candidates for execution. Clicking the link opens the Enterprise Package Detail page.

Enterprise Package Execution History Report

This report lists the details of all Enterprise packages that were executed along with execution details and execution status. The report includes totals. This report is created from the Enterprise package execution history.

Configuration	Execution End Time	Execution Status	Enterprise Package Name
Packages executed on: 2004-11-17			
endeavor (E)	2004-11-17 14:15:52	Successful	STCTEST
Total Packages:	1	Successful: 1	Failed: 0
Grand Total:	1	Successful: 1	Failed: 0
Click here to return to Enterprise Reports			

Clicking the Enterprise Package name in the report opens the Enterprise Package History page for a package. This page includes the following other headings:

Configuration

Indicates the CA Endeavor SCM host and CA SCM broker combination for the user who submitted the package for execution.

Execution End Time

Indicates the time that the package finished executing.

Execution Status

Indicates the Enterprise Package Execution Status: Successful or Failed.

Enterprise Package Name

Indicates the name of the Enterprise package. Clicking the link opens the Enterprise Package History page for the package.

Enterprise Package Status Report

This report lists the current status for each Enterprise package, with totals for each status at the bottom of the report.

Enterprise Configuration: endeavor (Endeavor)			
Enterprise Package Status		Last Update Time	Enterprise Package Name
Initial		2004-11-19 15:31:54	DOCUMENTS
Initial		2004-11-17 14:23:41	STCTEST
Ready-to-Execute		2004-11-22 15:31:57	TEST GIFRM
Initial		2004-11-19 18:18:45	STANDARD
Total Packages: 4			
Initial:	3	Execution Failed: 0	Execution successful: 0
Cancelled:	0	Ready-to-Execute: 1	In-Approval: 0
Click here to return to Enterprise Reports			

Clicking the Enterprise package name in the report opens the Enterprise Package Detail page. This page includes the following other headings:

Enterprise Package Status

Indicates the status of the package; for example, In-Approval.

Last Update Time

Indicates the date and time the package was last updated.

Enterprise Package Name

Indicates the name of the Enterprise package. Clicking the link opens the Enterprise Package Detail page.

User-defined Enterprise Reports

Report Builder is based on CleverPath Reporter functionality. You can use CA CM Enterprise Workbench Report Builder to create your own custom reports and integrate them into CA CM Enterprise Workbench. After you create a report, you can integrate it into the Enterprise Reports page.

Note: You should not modify the predefined reports included with CA CM Enterprise Workbench. You can, however, use the predefined reports as a guide when building your own custom reports. In addition, a sample custom report is included that you can enable and use as a guide.

Report Builder

Note: To create reports, the Report Builder component must be installed. After the Report Builder is installed, CleverPath Reporter documentation is installed in the %PROGRAMFILES%\CA\SharedComponents\CleverPath Reporter\4.1\doc directory and is also available from the Help menu on the Report Builder.

The Report Builder is located in the directory identified by the Reporting.ReporterServer variable in the ew.cfg file. Location of configuration files is defined in the environment variable %EW_HOME%.

To start the Report Builder

Click Start on the Windows task bar and select Programs, CA, CA, CM Enterprise Workbench, Reporting, Report Builder.

The Report Builder opens.

Enable and Integrate the Sample User-defined Report

To help you understand how to integrate your own reports, you may enable and integrate the sample user-defined report.

To enable the sample report

1. Rename the file Enterprise_Package_Weekly_Activity_Report.usr to Enterprise_Package_Weekly_Activity_Report.rep.

Note: Enterprise report files are located in the sub-directory named enterprise under the reports parent directory. The reports parent directory is identified by the Reporting.ReportsParentDir variable in the ew.cfg file. The default location of the enterprise reports is:

C:\Program Files\CA\CA CM Enterprise Workbench\ew\reports\enterprise

2. Click the Locator menu and select Enterprise Reports.

The Enterprise Reports page opens. The sample report should appear in the list of reports in boldface to differentiate it from the pre-defined reports.

The custom report is now ready to be run.

Modify the Sample Report

You can modify the sample report for your own purposes.

To modify the sample report

1. Start the Report Builder by running the builder.bat batch file.
Alternatively, click Start on the Windows task bar and select Programs, CA, CA, CM Enterprise Workbench, Reporting, Report Builder.
2. Open the sample user-defined report.
A new window opens for the database login parameters.
3. Depending on your DBMS, enter the following parameters:

For Oracle Reports:

Source Type	Oracle
User	CA CM Enterprise Workbench Oracle database user name
Password	CA CM Enterprise Workbench Oracle database user's password
Connection	Oracle service name. Configure the service name using the Oracle Net Configuration Assistant to connect to the Oracle database on the local or remote machine.

For SQL Server Reports:

Source Type	ODBC
User	CA CM Enterprise Workbench SQL Server database user name
Password	CA CM Enterprise Workbench SQL Server database user's password
Connection	ODBC datasource: cmew_sqlserver

4. Click View, Design.

5. Click Query, Edit.

A new window opens showing the query used to define the output of the report.

6. Make any changes to the query or define a new query and save the report.
7. Make any required attribute changes; for example, color, fonts, and so forth.
8. Click the Locator menu and select Enterprise Reports. Run the report again to view the modified report output.

Integrate Additional User-defined Enterprise Reports

You can build your own reports and integrate, view, and run them from the CA CM Enterprise Workbench Enterprise Reports page.

To integrate additional user-defined reports

1. Click Start on the Windows task bar and select Programs, CA, CA, CM Enterprise Workbench, Reporting, Report Builder.

The Report Builder opens.

2. Select New Report and select a report type.

A new window opens, displaying the database login parameters.

3. Enter the database parameters to connect to the CA CM Enterprise Workbench database, as described in Step 3 of Modify the Sample Report.
4. Create a new Enterprise report using the Reporter documentation.
5. Select the following options:
 - a. Click Options, Preferences, and then select the Save Database passwords in reports check box. Click OK to close the dialog.
 - b. Click Attributes, Report Attributes and select the Use saved values for login option. Click OK to close the dialog.
6. Save the new report in the Enterprise sub-directory of the Reports parent directory.

Note: This directory is identified by the Reporting.ReportsParentDir variable in the ew.cfg file.

7. Decide whether a custom parameter file must be created based on the criteria described in *How the Parameter File Works for User-defined Reports*. Create the custom parameter file, if needed.

If you do not create a custom parameter file, CA CM Enterprise Workbench generates a default parameter file and uses it to run the user-defined report.

8. Click the Locator menu and select Enterprise Reports. Run the new report to view the modified report output.

How the Parameter File Works for User-defined Reports

When you run a report, the system creates a parameter file that contains the database information and any other parameters needed for report generation.

For user-defined reports, CA CM Enterprise Workbench determines information about the database and any other parameter values needed for running the report using one of the following methods:

- If there is a user-defined parameter file (with a .par suffix) and a user-defined report file with the same file name in the same directory, that parameter file is used to run the report.
Note: You can create parameter files for user-defined reports using the paramgen.bat file, which resides in the same directory as builder.bat.
- If the previously described parameter file is not present, CA CM Enterprise Workbench creates a default parameter file and uses it to run the user-defined report. This default parameter file contains the database information for the enterprise database defined in the EnterpriseDB.cfg file being used by CA CM Enterprise Workbench.

Note: For details about CleverPath Reporter parameter files, see the CleverPath Reporter documentation.

Appendix A: CCM Terminology Cross-Reference

The following tables provide a cross-reference between CA Endeavor SCM and CA SCM terminology for parallel CCM items.

Cross-reference Sorted by Item

Item	CA Endeavor SCM Term	CA SCM Term
Application	Subsystem	Project
Life cycle stage	Stage	State
Unit of Change	CCID or Package	Package
Configuration item	Element	Item
List of managed items	Location	View
Life cycle definition	Map	Process Model
Advance code to the next stage in the life cycle	Move	Promote
Demote code back to the previous stage in the life cycle	Backout	Demote
Change management	Actions	Processes
Customized interface	Exit	User Defined Process (UDP)
Run-time module	Load Modules	Openmake Target
Readable/Executable Source/Load Location	Image Library	Openmake Reference Directory
Location of tracked changes	Delta Library	Repository
Executable type	Processor Group	Openmake Build Type
Executable creation commands	Processors	Openmake Rules and Scripts
Search order for compiling source code	Library Concatenation	Openmake Version Path
Promotion Group	Package	Package Group

Cross-reference Sorted by CA Endeavor SCM Term

CA Endeavor SCM Term	CA SCM Term	Item
Subsystem	Project	Application
Stage	State	Life cycle stage
CCID	Package	Unit of Change
Element	Item	Configuration item
Location	View	List of managed items
Map	Process Model	Life cycle definition
Move	Promote	Advance code to the next stage in the life cycle
Backout	Demote	Demote code back to the previous stage in the life cycle
Actions	Processes	Change management
Exit	User Defined Process (UDP)	Customized interface
Load Modules	Openmake Target	Run-time module
Image Library	Openmake Reference Directory	Readable/Executable Source/Load Location
Delta Library	Repository	Location of tracked changes
Processor Group	Openmake Build Type	Executable type
Processors	Openmake Rules and Scripts	Executable creation commands
Library Concatenation	Openmake Version Path	Search order for compiling source code
Package	Package or Package Group	Promotion Group

Cross-reference Sorted by CA SCM Term

CA SCM Term	CA Endeavor SCM Term	Item
Project	Subsystem	Application
State	Stage	Life cycle stage
Package	CCID or Package	Unit of Change
Item	Element	Configuration item

CA SCM Term	CA Endeavor SCM Term	Item
View	Location	List of managed items
Process Model	Map	Life cycle definition
Promote	Move	Advance code to the next stage in the life cycle
Demote	Backout	Demote code back to the previous stage in the life cycle
Processes	Actions	Change management
User Defined Process (UDP)	Exit	Customized interface
Openmake Target	Load Modules	Run-time module
Openmake Reference Directory	Image Library	Readable/Executable Source/Load Location
Repository	Delta Library	Location of tracked changes
Openmake Build Type	Processor Group	Executable type
Openmake Rules and Scripts	Processors	Executable creation commands
Openmake Version Path	Library Concatenation	Search order for compiling source code
Package Group	Package	Promotion Group

Appendix B: Local File System API Error Messages

Purpose of This Appendix

This appendix explains return codes, message types, and messages specific to using CA Endevor SCM local file system support. It also describes messages received for particular reason codes.

Note: For more information on CA Endevor SCM return codes and messages, see the *CA Endevor SCM Change Manager Errors and Messages Guide*.

Return Codes and Message Types

The CA Endevor SCM API uses return codes and reason codes to report the status of your API function calls. The following return codes may result after a CA Endevor SCM API function call. Message identifiers (for example, LFS0000I) end with a one-letter code explained in the Type column.

Return Code	Type	Description
None	I – Informational	Processing concluded normally. A message is issued for informational purposes only.
4	W – Warning	An error was encountered which was not serious enough to terminate processing.
12	E – Error	An error was encountered that terminated processing of the current action but allowed CA Endevor SCM to continue with the next action request.
16	S – Severe	A severe error was encountered that prevented CA Endevor SCM from completing the requested action. Processing terminates immediately. This category includes internal, system, and I/O errors.

Return Code and Reason Code Descriptions

Each return code has a reason code associated with it. The reason codes that can accompany a return code follow.

LFS0000I

BEGINNING OF PRE-ACTION PROCESSING

Return Code:

None.

Reason Code:

None.

Reason:

A header message is issued for pre-API messages that follow.

Action:

None.

Example:

16:44:16 LFS0000I BEGINNING OF PRE-ACTION PROCESSING

LFS0001I

BEGINNING OF POST-ACTION PROCESSING

Return Code:

None.

Reason Code:

None.

Reason:

A header message is issued for post-API messages that follow.

Action:

None.

Example:

11:18:16 LFS0001I BEGINNING OF POST-ACTION PROCESSING

LFS0002I

**Apply Character set conversion from local encoding
local_encoding_string to Endeavor encoding *Endevor_encoding_string***

Return Code:

None.

Reason Code:

None.

Reason:

The CA CM Enterprise Workbench server executed the character translation on the contents of the uploaded local file for this Add or Update action.

local_encoding_string

Designates the value of the LFS.EncodingString parameter in the Endeavor.cfg configuration file: LFS.EncodingString=ISO-8859-1.

Endevor_encoding_string

Designates the value of the EncodingString parameter in the Endeavor.cfg configuration file: EncodingString=CP01140.

Note: For more information on these parameters, see the chapter “Updating Configuration Files” in the *Implementation Guide*.

Action:

None.

Example:

LFS0000I BEGINNING OF PRE-ACTION PROCESSING

16:44:16 LFS0002I Apply Character set conversion from local encoding ISO-8859-1 to Endeavor encoding Cp01140

LFS0003I

**Apply Character set conversion from Endeavor encoding
Endevor_encoding_string to local encoding *local_encoding_string***

Return Code:

None.

Reason Code:

None.

Reason:

The CA CM Enterprise Workbench server executed the character translation on the contents of the downloaded local file for the Retrieve action, post-API processing.

Endevor_encoding_string

Designates the value of the EncodingString parameter in the Endeavor.cfg configuration file: EncodingString=CP01140.

local_encoding_string

Designates the value of the LFS.EncodingString parameter in the Endeavor.cfg configuration file: LFS.EncodingString=ISO-8859-1.

Note: For more information on these parameters, see the chapter “Updating Configuration Files” in the *Implementation Guide*.

Action:

None.

Example:

```
11:18:16 LFS0001I BEGINNING OF POST-ACTION PROCESSING
```

```
11:18:16 LFS0003I Apply Character set conversion from Endeavor encoding  
Cp01140 to local encoding ISO-8859-1
```

LFS0101I**Copying File *filename* on your local directory *path*****Return Code:**

None.

Reason Code:

None.

Reason:

CA CM Enterprise Workbench starts the process of copying the retrieved element into your local directory.

filename

Designates the file name the user entered or CA CM Enterprise Workbench generated.

path

Designates the local directory.

Action:

None.

Example:

14:06:38 LFS0101I Copying file LANIP88.txt on your local directory
C:\tmp

LFS0111I

File *filename* has been successfully written on your local directory *path*

Return Code:

None.

Reason Code:

None.

Reason:

CA CM Enterprise Workbench successfully wrote the retrieved element to your local file system.

filename

Designates the file name.

path

Designates the target local directory.

Action:

None.

Example:

```
14:06:27 LFS0001I BEGINNING OF POST-ACTION PROCESSING
```

```
14:06:38 LFS0111I File LABIP88.txt has been successfully written on  
your local directory C:\tmp
```

LFS0112I

File *filename* has been successfully deleted from your local directory *path*

Return Code:

None.

Reason Code:

None.

Reason:

CA CM Enterprise Workbench successfully deleted the file from your local directory after a successful add or update of the element in CA Endevor SCM.

filename

Designates the file name.

path

Designates the local directory.

Action:

None.

Example:

14:31:11 LFS0112I File LABIP88.txt has been successfully deleted from your local directory C:\tmp

LFS0017W

File Extension *ext* is missing, please rename the file *filename* as *filename.ext*

Return Code:

4

Reason Code:

4

Reason:

During a Retrieve action, the "To" file name is not suffixed with the expected file extension, as defined in the CA Endevor SCM TYPE parameter, FILE EXT. This warning is issued because the discrepancy could compromise subsequent Add or Update actions (file extension validation).

ext

Designates the expected file extension.

filename

Designates the file name.

filename.ext

Designates the file name with the expected extension.

Action:

None.

Example:

```
16:52:29 LFS0001I BEGINNING OF POST-ACTION PROCESSING
```

```
16:52:29 LFS0017W File Extension txt is missing, please rename the  
file LABPY11 as LABPY11.txt
```

LFS0012W

Data format is not defined for ENDEVOR TYPE *type*, Binary Retrieve is performed

Return Code:

4

Reason Code:

8

Reason:

Elements that have an associated TYPE record without a data format defined can be retrieved to the local file system, but no character set conversion is applied. The element is retrieved as a binary file.

type

Designates the CA Endevor SCM TYPE.

Action:

None.

Example:

```
11:14:33 LFS0001I BEGINNING OF POST-ACTION PROCESSING
```

```
11:14:33 LFS0012W Data format is not defined for ENDEVOR TYPE PROCESS,  
Binary Retrieve is performed
```

```
11:14:34 LFS0101I Copying file ELMDELW1 on your local directory C:\tmp
```

```
11:14:34 LFS0111I File ELMDELW1 has been successfully written on your  
local directory C:\tmp
```

LFS0160E

INVALID SOURCE RECORD LENGTH - *length* EXCEEDS MAXIMUM RECORD LENGTH FOR TYPE *type*

Return Code:

12

Reason Code:

0

Reason:

This is a pre-API message. CA CM Enterprise Workbench anticipates a CA Endeavor SCM validation during an Add or Update action. The file contains records that exceed the maximum length defined in the TYPE record. The action is aborted.

length

Designates the invalid source record length.

type

Designates the CA Endeavor SCM TYPE.

Action:

None.

LFS0004E

File extension *ext* does not match with the ENDEVOR type file extension *type_ext*

Return Code:

12

Reason Code:

4

Reason:

The file extension of the file from the local file system to be added or updated in the CA Endevor SCM repository does not match the file extension specified in the CA Endevor SCM TYPE parameter. The Add or Update action is aborted during pre-API processing.

ext

Designates the file extension.

type_ext

Designates the setting of the CA Endevor SCM TYPE parameter, FILE EXT. The local file must have the same extension as FILE EXT. The file extension is case-sensitive (*.cob is different from *.COB), and the maximum length is eight characters, which matches the maximum length of FILE EXT.

Important! This error message occurs only when the target element parameter is not specified or when more than one file is being added or updated from the local file system. Therefore, it is possible to bypass extension checking if you enter the element name for the Add or Update action.

Action:

None.

Example:

10:19:04 LFS0004E File extension cob does not match with the ENDEVOR type file extension COB

LFS0008E

File extension is required for ENDEVOR type *type*

Return Code:

12

Reason Code:

8

Reason:

The file from the local file system to be added or updated in the CA Endevor SCM repository does not have a file extension as specified in the CA Endevor SCM TYPE parameter, FILE EXT. The Add or Update action is aborted during pre-API processing.

type

Designates the CA Endevor SCM TYPE.

The local file must have the same extension as defined in the TYPE parameter, FILE EXT. The file extension is case-sensitive (*.cob is different from *.COB), and the maximum length is eight characters, which matches the maximum length of the CA Endevor SCM TYPE parameter, FILE EXT.

Important! This error message occurs only when the target element parameter is not specified or when more than one file is being added or updated from the local file system. Therefore, it is possible to bypass extension checking if you enter the element name for the Add or Update action.

Action:

None.

Example:

17:04:29 LFS0000I BEGINNING OF PRE-ACTION PROCESSING

17:04:29 LFS0008E File extension is required for ENDEVOR type COBOL

LFS0011E**Character Set *char_set* conversion error *error*****Return Code:**

12

Reason Code:

11

Reason:

During an Add, Update, or Retrieve action, files or elements whose TYPE parameter DATA FORMAT=T (for text) undergo a character set conversion. During this conversion from or to CA Endevor SCM, an exception occurred.

char_set

Designates the character set.

error

Designates the exception.

Action:

None.

LFS0013E

Data format is not defined for ENDEVOR TYPE *type*

Return Code:

12

Reason Code:

13

Reason:

The Add or Update action from the local file system is not allowed for the target TYPE without a defined data format. You must set the data format to Text or Binary. This checking prevents incorrect updating of existing elements from a non-mainframe platform.

type

Designates the CA Endevor SCM TYPE.

Action:

None.

Example:

11:16:16 LFS0000I BEGINNING OF PRE-ACTION PROCESSING

10:38:58 LFS0013E Data format is not defined for ENDEVOR TYPE PROCESS

LFS0103E

Directory *path* does not exist, file cannot be written

Return Code:

12

Reason Code:

23

Reason:

This is a post-API message. This error occurs if an element is being retrieved to the local system and the local directory was deleted or renamed. During pre-API processing, CA CM Enterprise Workbench checks the existence and the rights of the local directory. If the directory does not exist, an error dialog opens.

path

Designates the local directory.

Action:

Important! You must undo the Retrieve action in CA CM Enterprise Workbench because CA Endevor SCM performed the Retrieve transaction and is not notified of this error.

LFS0104E

File *filename* already exists and replace option is not set to Y

Return Code:

12

Reason Code:

24

Reason:

This is a post-API message. This error occurs when an element is being retrieved to the local file system and the element has the same name as an existing file in the local directory. During pre-API processing, CA CM Enterprise Workbench checks to see if a file with the same name already exists in the local directory. If so, an error dialog opens, instructing you to use the file replace option.

filename

Designates the file name.

This validation occurs only if the file name is known when you click Execute for the Retrieve action. This validation is not performed when multiple elements are retrieved in a single operation or when the file name is not entered on the Retrieve tab.

Action:

Important! You must undo the Retrieve action in CA CM Enterprise Workbench because CA Endevor SCM performed the Retrieve transaction and is not notified of this error.

LFS0105E

File *filename* is read only, file cannot be written on your local directory

Return Code:

12

Reason Code:

25

Reason:

This is a post-API message. This error occurs when an element is being retrieved to the local file system and the element has the same name as an existing read-only file in the local directory. During pre-API processing, CA CM Enterprise Workbench checks to see if a file with the same name already exists in the local directory. If a file exists and it is read-only, an error dialog opens.

filename

Designates the file name.

This validation occurs only if the file name is known when you click the Execute for the Retrieve action. This validation is not performed when multiple elements are retrieved in a single operation or when the file name is not entered on the Retrieve tab.

Action:

Important! You must undo the Retrieve action in CA CM Enterprise Workbench because CA Endevor SCM performed the Retrieve transaction and is not notified of this error.

Example:

15:30:48 LFS0105E File C:\tmp\LAB123A.txt is read only, file cannot be written on your local directory

LFS0006S**File *filename* has not been uploaded****Return Code:**

16

Reason Code:

6

Reason:

During the Add or Update action, CA CM Enterprise Workbench did not upload the file from the local file system to the CA CM Enterprise Workbench server temporary area. A communication failure probably occurred.

filename

Designates the file name.

Action:

None.

LFS0009S

CA CM Enterprise Workbench IO ERROR *io_error*

Return Code:

16

Reason Code:

9

Reason:

During an Add, Update, or Retrieve action, uploaded files or retrieved elements are copied to the CA CM Enterprise Workbench server temporary area. During the packaging of the temporary file, an IO error occurred.

io_error

Designates the Java exception message trapped for the IO error.

Note: For more information, consult your CA CM Enterprise Workbench administrator or server administrator.

Action:

None.

LFS0010S**ENDEVOR API IO ERROR *api_io_error*****Return Code:**

16

Reason Code:

10

Reason:

During an Add, Update, or Retrieve action, CA CM Enterprise Workbench executes the CA Endevor SCM API and passes data (elements or files) over the network. During the buffer management or network IO, an error occurred.

api_io_error

Designates the API error.

Action:

Browse the STC JES output to diagnose the problem on both CA CM Enterprise Workbench and CA Endevor SCM sides.

LFS0014S

Retrieve Cancelled. Number of elements already retrieved exceeds the limit of *number* files

Return Code:

16

Reason Code:

14

Reason:

This is a pre-API message. The number of elements allowed to be transferred in a single Add, Update, or Retrieve action is exceeded.

number

Designates the number of files set in the Endeavor.cfg parameter LFS.MaxNumberOfFiles.

Note: For more information on Endeavor.cfg parameters, see the chapter “Updating Configuration Files” in the *Implementation Guide*.

Action:

None.

LFS0015S

Retrieve Cancelled. Size of the elements already retrieved exceeds the limit of *number* KBytes

Return Code:

16

Reason Code:

15

Reason:

This is a pre-API message. The amount of data allowed to be transferred in a single Add, Update, or Retrieve action is exceeded.

number

Designates the total size of the files set in the Endeavor.cfg parameter LFS.MaxNumberOfData.

Note: For more information on Endeavor.cfg parameters, see the chapter “Updating Configuration Files” in the *Implementation Guide*.

Action:

None.

Glossary

configuration

A *configuration* consists of the host ID and broker ID pair entered in the login page at the beginning of the session. Enterprise packages are specific to a configuration.

correlation

Correlation identifies a CA Endeavor SCM or CA SCM package as belonging to an Enterprise package. When correlated, the actions that can be performed outside of the Enterprise package are restricted. Correlation occurs when a CA Endeavor SCM or CA SCM package is added to an Enterprise package. *See also* Uncorrelation.

data source

A *data source* is a data repository located in an underlying product or database.

enterprise package

An *Enterprise package* is a super-package containing multiple CA Endeavor SCM packages, CA SCM packages, or both. By combining multiple packages into a single Enterprise package, you can associate related change packages and manage them as a single unit to ensure that they are synchronized appropriately throughout their life cycle.

Executor

The *Executor* is a program that processes Enterprise packages submitted for execution. Before processing an Enterprise package, the Executor verifies the state of the Enterprise package and all its sub-packages and checks the execution window to make sure that the execution date complies with it.

Java class

A *Java class* is the compiled output of a piece of Java source code.

JDBC

JDBC stands for Java Database Connectivity, a method for connecting to a database.

JSP

JSP stands for Java Server Page.

project

In the CA Endevor SCM context, a *project* is a combination of the CA Endevor SCM environment, system, and subsystem. In the CA SCM context, a project is where you work within CA SCM. It contains the life cycle processes and data that you use for your project.

servlet

A *servlet* is a Java object that runs on web servers using a CGI-like mechanism. Java servlets are designed as a Java replacement for CGI. Servlets can be used and migrated between web servers because they rely on the servlet API rather than the server itself.

sub-package

A *sub-package* is a CA Endevor SCM or CA SCM package that has been added to an Enterprise package.

uncorrelation

Uncorrelation detaches a CA Endevor SCM or CA SCM package from an Enterprise package. When uncorrelated, all CA Endevor SCM actions or CA SCM processes are available to be applied against a package. Uncorrelation occurs when a sub-package is removed from an Enterprise package or when an Enterprise package is deleted. See *also* Correlation.

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