



SERENA®
ORCHESTRATED OPS
Upgrade Guide

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Chapter 1: Welcome to Serena Orchestrated Ops

Serena Orchestrated Ops contains three solutions that can be used independently or together to create a world-class IT solution.

The individual solutions in Serena Orchestrated Ops include:

- Serena Request Center
- Serena Service Manager
- Serena Demand Manager

Serena Request Center

Serena Request Center provides a one-stop interface for corporate users to discover and request services, submit requests, and review knowledge base articles. It comes with a rich, interactive, and intuitive Web portal. The portal contains an enterprise service request catalog allowing service requests to be composed, organized, and published into convenient categories for easy access.

The portal comes pre-populated with service requests such as "New Hire Request" and "Install/Upgrade OS" that use the Service Request workflow in the SRC - Service Request process app. The service requests use the Starter Pack Forms, which are customized external forms for submitting requests.

Request Center includes Knowledge Center for managing knowledge base articles and announcements. Urgent announcements are displayed prominently below the Request Center banner, unless the announcement bar is disabled. Articles are organized by category to filter them for easier searching, and are assigned to visibility groups to control who can access them.

Serena Service Manager

Serena Service Manager is a process-driven approach to IT service management—one that allows business and IT to work together, in perfect harmony. Unlike traditional ITSM solutions that are difficult to use, expensive to maintain, and provide limited visibility across the service delivery lifecycle, Serena Service Manager draws on the power of a process management platform at its core to provide the following benefits:

- Lower total cost of ownership (TCO)
- Complete visibility
- Improved user satisfaction and agent productivity
- Contemporary interface for IT services

Serena Service Manager comes packaged with fully functional, easy-to-use applications including those for Incident, Problem, Change, and Configuration Management. Service

Manager also provides the IT operations team with visual dashboards and robust report generation capabilities so they can maintain complete visibility across the end-to-end service delivery process. This includes the ability to view actionable metrics related to costs and resource utilization.

Serena Demand Manager

Serena Demand Manager enables product managers, product owners, and other planners to analyze and plan incoming business requests for projects, such as new application development, Web site requests, or infrastructure improvements. Demand Manager provides an overall view into the cost, effort, and benefit of each request, enabling planners to prioritize and effectively plan them.

Serena Demand Manager includes:

- **Serena Demand Center**

Demand Center provides an intuitive, Web-based portal that enables product managers, product owners, and others to manage incoming demand for large projects.

- **Demand Plan process app**

This process app is integrated with Demand Center to manage demand plans from creation to close.

- **Business Requests process app**

Use this process app to capture and track incoming business requests, which are also referred to as demand items.

- **Demand Manager Orchestrations process app**

Contains the orchestration workflows that create and update demand plans and perform other automated processes.

Purpose of This Guide

This guide describes how to upgrade Serena Orchestrated Ops.

This guide is meant for administrators who are responsible for upgrading an existing SOO installation. It includes detailed information on upgrading the file system and the SOO solution files. For all other information, refer to the following documents available [here](#):

- *Serena Orchestrated Ops Installation and Configuration Guide* for detailed information about initially installing, configuring, and promoting the solutions.
- *Serena Orchestrated Ops Getting Started Guide* for detailed information about the process apps and features provided by the solutions and administrative duties you perform in SOO.
- Serena Orchestrated Ops readme for a list of new features in this release.

For detailed information on modifying projects, users, workflows, or orchestrations in the process apps after you have promoted them, refer to the following guides that are included with your Serena® Business Manager installation:

- *SBM Application Administrator Guide* for configuring projects, users, and groups.

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- *SBM Composer Guide* for modifying workflows, orchestrations, and other aspects of process app design.
 - *SBM Application Repository Guide* for deploying and promoting snapshots and process apps.
 - *SBM Installation and Configuration Guide* for installing and configuring the SBM platform.

Chapter 2: Preparing for the Upgrade

This chapter contains important information to help you prepare for the upgrade.

- [Overview \[page 9\]](#)
- [Planning Now for Later Upgrades \[page 9\]](#)
- [Pre-Upgrade Steps \[page 11\]](#)
- [Important Notes for Upgrades \[page 11\]](#)
- [Creating a Comparison Report in SBM Composer \[page 12\]](#)

Overview

The Serena Orchestrated Ops upgrade process consists of two phases: the **installation upgrade** and the **solutions upgrade**.

- In the **installation upgrade** phase, you run the SOO installer and configure your installation using SBM Configurator. This installs the newest versions of the framework files and configures your installation to use them.
- In the **solutions upgrade** phase, you import the new solutions and decide if you will preserve or overwrite the modifications you have likely made to the process apps.



Note: The solutions upgrade phase is optional, with the exception of the Serena Demand Manager solution. (It is recommended that you upgrade the SDM solution to take advantage of the latest features.) Only upgrades from 4.0 or 4.0.1 are supported for Serena Demand Manager.

To preserve your current workflows and data (forgoing the latest versions of the SRC and SSM process apps), simply run the SOO installer and configure your installation using SBM Configurator as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades just the framework files and completes the installation upgrade phase.

To upgrade your process apps to the latest versions as well, review the following chapter below that corresponds to your current version, and then upgrade the solutions:

- [Chapter 4: Upgrading 4.0.1 Process Apps \[page 17\]](#)
- [Chapter 5: Upgrading 4.0 Process Apps \[page 25\]](#)
- [Chapter 6: Upgrading 3.5 Process Apps \[page 33\]](#)
- [Chapter 7: Upgrading 3.1 Process Apps \[page 39\]](#)

Planning Now for Later Upgrades

The SOO solutions are highly customizable and configurable. Because of these powerful attributes, it is important that you plan accordingly for future upgrades. You should know all the important details about your application and its requirements, and you should also

plan and design your changes with upgrades in mind in the future. These two concepts are keys to successful upgrades.

Know Your Process Apps

Reviewing your customizations and requirements before you upgrade is critical to preserving changes in your process apps. Serena recommends that you thoroughly review your process apps before you upgrade so that you have a good understanding of the customizations that you have made.

Understanding your application's requirements and how they are implemented is key to a successful upgrade. To prepare for future upgrades:

- Maintain lists of key changes and customizations you have made to your process apps.
- Know the process app's requirements.
- Define use cases to help you test the process apps as part of post-upgrade validation.

Use the **Comparison Report** in SBM Composer to help you identify changes that you have made to your process apps that you want to preserve. For details, refer to [Creating a Comparison Report in SBM Composer \[page 12\]](#).

Plan and Design for Upgrades

Planning ahead and designing your apps with upgrades in mind saves you time and effort later.

Use the following best practices as part of designing your process apps with upgrades in mind:

- Avoid naming collisions. Create and use your own prefix for the internal names of fields, states, transitions, and custom forms.
- Duplicate your forms. You cannot merge elements of a form; therefore, consider duplicating the form, modifying it, and using the new copy. The original form can be overwritten during the compare and merge process; however, the customized form will remain intact. You can use it as a reference to apply your changes to the new version.
- Consider creating sub-workflows or create duplicate workflows. You might use duplicate workflows if:
 - The workflow is specific to a particular business unit and you might expand into other areas in the future.
 - The scope of the changes is large enough that you foresee complications with upgrades.

Use the **Compare** feature in SBM Composer to preserve your changes and upgrade your process apps. For details, refer to the "Preserving Changes in the Process Apps" topic in the chapter that applies to your current version.

After you have finished preserving your changes using the **Compare** feature, use a test system to validate your application. Ensure that the new application meets your requirements, and then deploy the modified app to your production system.

Pre-Upgrade Steps

Before you begin the upgrade process:

1. If you are not using at least SBM version 10.1.2 or later, follow the instructions in the SBM readme to upgrade your existing SBM installation.
2. After you have successfully upgraded to SBM 10.1.2 or later, back up your existing SBM database before installing SOO.
3. Review the [Important Notes for Upgrades \[page 11\]](#) section to ensure your database is prepared for the upgrade and that you are prepared to run the SOO installer on the proper servers.
4. Decide if you will upgrade your current SOO process apps in addition to upgrading the installation.
5. If you decide to upgrade your process apps, follow the steps described in [Creating a Comparison Report in SBM Composer \[page 12\]](#) to help you identify changes you have made to the process apps that you might want to preserve.
6. Back up the installation directory structure for SBM on your SBM Application Engine machine.
7. Download the latest version of SOO from support.serena.com.

Important Notes for Upgrades

Review the following important notes for all upgrades from previous versions of Serena Orchestrated Ops.

- Upgrades of Serena Demand Manager to version 4.5 are only supported from versions 4.0 and 4.0.1. The SDM - Project Proposal and SDM - Voting applications that were included with version 3.5 were replaced by the SDM - Demand Plan app in SOO 4.0. To use the new process app, import the Serena Demand Manager 4.5 solution, and then promote the SDM - Demand Plan process app.
- After you promote the SDM - Demand Plan process app, log in to Demand Center as an administrator using the following URL: `http://serverName/tmtrack/tmtrack.dll?shell=sdm`. This populates the catalog in Demand Center.
- The "Manufacturer" field in the Configuration Items table in the Configuration Management System application is no longer related to the Vendors auxiliary table. Instead of being a Single-Relational field, the "Manufacturer" field is now a Text field. After an upgrade to Serena Orchestrated Ops 4.5, when a form containing the "Manufacturer" Single-Relationship field loads, the value of the field is copied to the "Manufacturer" Text field, and the Single-Relationship field is no longer displayed.
- For Oracle systems, the Oracle schema user requires a certain set of roles and privileges to enable "Oracle Text" for use with the Social Widget control that is enabled by default in the SOO process apps. See [S133641](#) for details.



Important: You must apply these roles and privileges to the Oracle schema user prior to promoting or deploying the SOO apps.

- For SQL Servers systems, you must ensure that "Full-Text Indexing" is enabled in the DBMS. Note the following:
 - In SQL Server 2005, "Full-Text Indexing" is enabled automatically once you successfully a deploy any process app in which the Social Widget is enabled, as long as the "Full-Text Search" feature was selected during the SQL Server DBMS install.
 - In SQL Server 2008, "Full-Text Indexing" is selected by default for all databases, as long as the "Full-Text Search" feature was selected during the SQL Server DBMS install.



Note: The Full-Text Search feature in SQL Server is an optional install component. Therefore, verify that the feature is installed in SQL Server first. To verify this, right-click on the database in SQL Server, select Properties, and then select the Files page. "Use full-text indexing" should be selected.

- The SOO installation requires that you run SBM Configurator, set the appropriate SLA load-level setting for your environment, and then click **Apply** after the installer is finished. This enables SBM Configurator to perform important updates to various configuration files on your server (or servers if your installation is distributed).
- If you do not see any services in the catalog after upgrading, perform the following steps:
 1. Copy the `Common.zip` and `SRP.zip` from `Serena\Solutions\SSM\Framework\Shell`.
 2. Paste both `.zip` files into `Serena\SBM\Application Engine\payload`.
 3. Reset IIS.
 4. Launch the User Workspace and then access Serena Request Center.

Creating a Comparison Report in SBM Composer

This section describes how to create a report in SBM Composer that helps you identify the changes you have made to your process apps. You will use this report to determine which changes you want to preserve and copy to the new version of each process app.

Serena recommends that you compare your current process apps to the original versions that were packaged as part of the installation. If you did not make any changes to the process apps or you do not want to preserve your changes, simply follow the steps in [Chapter 3: Upgrading the Installation \[page 15\]](#) to upgrade the framework files to the latest version. If you want to use the latest versions of the process apps as well, perform the steps described in [Chapter 3: Upgrading the Installation \[page 15\]](#) and then perform the process app upgrade steps described later in this guide.

To create a comparison report:

1. In Application Repository, click the **Environments** tab.
2. Click the environment name to open it.
3. Click the **Deploy History** tab.

-
4. Select the process app and click **Open**.
 5. Select version 1 of the process app and then click **Save to File**.
 6. Select the latest version of the process app that you have deployed and then click **Save to File**.



Tip: Take note of this file name and save location. If you determine that you want to preserve the modifications you have made, you will use this file in the merge steps later on.

7. Launch SBM Composer and **Import** version 1 or the process app from the file you just saved.
8. Select the **Compare** option from the Composer menu, and open the latest version of the process app from the file that you saved earlier to launch a side-by-side comparison.
9. Click the **Export** button to create a report that shows you the changes you have made since the initial promotion.
10. Repeat these steps for each of your current process apps.

For details on using the Compare feature, see the "Comparing and Merging Process Apps" topic in the *SBM Composer Guide*.

Chapter 3: Upgrading the Installation

This section discusses how to upgrade the installation and framework files for all SOO upgrades.

- [About the Installation Upgrade \[page 15\]](#)
- [Upgrading the Installation \[page 15\]](#)

About the Installation Upgrade

Upgrading the installation involves running the SOO installer and configuring the installation using SBM Configurator. You must upgrade the installation before you can import the newest versions of the SOO solutions.



Tip: You can upgrade the installation independently from the solutions upgrade. This means that you do not need to upgrade the solutions to take advantage of improvements and additions that have been added to the SOO framework files. However, it is recommended that you upgrade the SDM solution to take advantage of improvements in that solution.

The installation upgrade process updates the SOO framework files, applies the new configuration, and prepares the system for use by enabling SBM Application Engine to import the upgraded framework files into the Serena Request Center user interface.

Upgrading the Installation

This section describes the steps you will follow to upgrade your current installation.

To upgrade the installation:

1. Run the SOO installer on the server or servers that host the following SBM components:
 - SBM Application Engine
 - SBM Application Repository
 - SBM Common Services



Note: If these SBM components are installed separately, you must run the SOO installer on each server.

The "Welcome to the Install Wizard for Serena Orchestrated Ops" message appears. Click **Next** to continue.

2. The installer detects which SBM components are currently installed on the server. A message appears if any of the required SBM components are not detected on the server. Click **Install** to install SOO.
3. Allow the installation to complete. Once the installation is finished, click **Configure** to launch SBM Configurator (close and reopen SBM Configurator if it was open

during the SOO install). In the SBM Configurator, set the SLA level for your environment on the **Orchestrated Ops** tab, configure the **Smart Search** tab, and then click **Apply**.



Important: You must launch SBM Configurator and click **Apply** to finish the installation and configuration process. When you click **Apply**, SBM Configurator updates various configuration files on the server and prepares the system for use.

4. Access the SBM User Workspace using the following URL and allow the interface to load:

`http://serverName/tmtrack/tmtrack.dll?`



Important: Accessing the SBM User Workspace immediately after SBM Configurator is an important part of the upgrade process. This enables the SBM Application Engine to import the framework files that comprise the new simplified user interface (Serena Request Center).

This completes the installation and configuration upgrade. To upgrade the process apps, continue to the next section that applies to your current version.

Chapter 4: Upgrading 4.0.1 Process Apps

This section discusses how to upgrade version 4.0.1 process apps.

- [About Upgrading \[page 17\]](#)
- [Upgrading the Process Apps \[page 18\]](#)
- [Preserving Changes in the Process Apps \[page 23\]](#)

About Upgrading

This section contains important information about upgrading your process apps from version 4.0.1. Use this section to help you evaluate the changes that have been made to the process apps and whether or not you want to upgrade to take advantage of the improvements.

Process App Changes

Review the readme file below for a list of changes and new features that were introduced since version 4.0.1 to help you determine if you want to upgrade your process apps.

- Click [here](#) for a list of features that were added in version 4.5.

Importing the Solutions

To begin upgrading your process apps, you must import the new solution files that are delivered by the installer. Importing a solution adds all of the snapshots and process apps for the solution to your SBM Server. The process apps and snapshots are available for promotion or deployment after the import.

Deploying or Promoting the Process Apps

After you import the solutions, you either deploy or promote the associated snapshots into your environment, depending on whether or not you want to preserve changes you might have made to your process apps.

If you are upgrading from an earlier version, it is likely that you modified the process apps; therefore, the solutions that are delivered by the installer are not automatically deployed to your default environment. As part of the upgrade process, you must decide if you want to preserve your modifications or if you want to overwrite the current versions of your process apps.

Therefore, for each process app you want to upgrade, choose one of the following two options:

- **Compare, merge, and deploy** – Review the comparison report you generated as part of the pre-upgrade process. If there are modifications that you made to the process apps that you want to preserve, use SBM Composer to compare and merge your changes and then deploy the process apps.

- **Promote** – Promote the new versions without comparing and merging, which will overwrite your modifications (if any). Promoting the snapshots places the latest contents of the solution, including all reports, notifications, process apps, and auxiliary table data, onto your SBM Server.

The following section describes these options as part of the upgrade process in more detail.

Upgrading the Process Apps

This section describes how to upgrade your 4.0.1 process apps to version 4.5.

If you began using SOO starting with version 3.1 or 3.5, proceed to [Upgrading All Process Apps \[page 34\]](#). If you upgraded to 3.1 before you upgraded to 3.5, choose one of the following options:

- If you upgraded to version 3.1 and you promoted all the process apps at that time (including the 3.1 version of SSM - Incident Management), follow the steps in [Upgrading All Process Apps \[page 34\]](#) to upgrade your 4.0.1 process apps to 4.5.
- If you upgraded to version 3.1, but you did not promote the 3.1 version of SSM - Incident Management (preserving either the 2.1 Incident Management or 3.0 Service Desk apps), and you want to continue to use these older versions, follow the steps in [Upgrading All Process Apps Except Incident Management or Service Desk \[page 36\]](#) to upgrade your 4.0.1 process apps to 4.5.

Upgrading All Process Apps

To upgrade all of your existing 4.0.1 process apps:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.
2. Log in to SBM Application Repository using the following URL:

```
http://serverName:port/mashupmgr
```

3. Select the **Solutions** tab.
4. Import the SOO 4.5 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

-
- SRC - Starter Pack Forms - IT
 - SRC - Service Request
 - SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Incident Management
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Upgrade the Serena Demand Manager app.

If you want to preserve any custom modifications that you made to the SDM process app, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process app instead of promoting it now.

Otherwise, promote the following process apps:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations



Tip: As of version 4.5, the UpdateDemandPlan and CreateDemandPlan orchestrations were moved to the SDM - Demand Manager Orchestrations process app. If you modified these orchestrations in a previous version, you must merge changes that you want to preserve into the new SDM - Demand Manager Orchestrations process app and deploy it after you promote it for the first time.

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Upgrading All Process Apps Except Incident Management or Service Desk

To upgrade your existing 4.0.1 process apps, but continue to use either the 2.1 version of Incident Management or the 3.0 version of Service Desk:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.

-
2. Log in to SBM Application Repository using the following URL:

`http://serverName:port/mashupmgr`

3. Select the **Solutions** tab.
4. Import the SOO 4.5 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SRC - Starter Pack Forms - IT
- SRC - Service Request
- SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps, except for the SSM - Incident Management process app.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps. (Note that the list excludes the SSM - Incident Management process app):

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Upgrade the Serena Demand Manager app.

If you want to preserve any custom modifications that you made to the SDM process app, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process app instead of promoting it now.

Otherwise, promote the following process app:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations



Tip: As of version 4.5, the UpdateDemandPlan and CreateDemandPlan orchestrations were moved to the SDM - Demand Manager Orchestrations process app. If you modified these orchestrations in a previous version, you must merge changes that you want to preserve into the new SDM - Demand Manager Orchestrations process app and deploy it after you promote it for the first time.

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

-
8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Preserving Changes in the Process Apps

This section describes steps you will follow to preserve any changes you made to your current process apps.

If you want to preserve changes that you made to your existing apps, use the **Compare** feature in SBM Composer to copy your modifications into the 4.5 apps and preserve them.

To merge your existing apps with the newer versions and preserve modifications:

1. Launch SBM Composer, and then open the newest version of the process app from the repository (which should appear after you have finished importing the new solutions).



Tip: Make sure not to open the local cache copy of the process app. If you are asked to overwrite or use a local copy, choose to overwrite.

2. Click the Composer button and then **Compare**. Select the option to compare **With Local File**.
3. Select the current version of the file that you saved earlier to create the comparison report. This version should contain all of the changes you have made to date.
4. Use the comparison report that you generated earlier to identify the elements that you want to preserve on the right side. Right-click the element to preserve, and then select **Copy to Open Process App** to copy the change into the new version of the app.



Note: The Compare tool in SBM Composer does not allow you to preserve individual elements of a custom form. If you want to use the new forms and preserve any customizations you might have made, you must merge the entire form and then manually implement your customizations again.

5. Save the changes to the new process app, and then deploy this version. You should now have a modified 4.5 version of the process app in your repository.
6. Repeat these steps for each process app that has changes you want to preserve.

Chapter 5: Upgrading 4.0 Process Apps

This section discusses how to upgrade version 4.0 process apps.

- [About Upgrading \[page 25\]](#)
- [Upgrading the Process Apps \[page 26\]](#)
- [Preserving Changes in the Process Apps \[page 30\]](#)

About Upgrading

This section contains important information about upgrading your process apps from version 4.0. Use this section to help you evaluate the changes that have been made to the process apps and whether or not you want to upgrade to take advantage of the improvements.

Process App Changes

Review the readme file below for a list of changes and new features that were introduced since version 4.0 to help you determine if you want to upgrade your process apps.

- Click [here](#) for a list of features that were added in version 4.0.1.
- Click [here](#) for a list of features that were added in version 4.5.

Importing the Solutions

To begin upgrading your process apps, you must import the new solution files that are delivered by the installer. Importing a solution adds all of the snapshots and process apps for the solution to your SBM Server. The process apps and snapshots are available for promotion or deployment after the import.

Deploying or Promoting the Process Apps

After you import the solutions, you either deploy or promote the associated snapshots into your environment, depending on whether or not you want to preserve changes you might have made to your process apps.

If you are upgrading from an earlier version, it is likely that you modified the process apps; therefore, the solutions that are delivered by the installer are not automatically deployed to your default environment. As part of the upgrade process, you must decide if you want to preserve your modifications or if you want to overwrite the current versions of your process apps.

Therefore, for each process app you want to upgrade, choose one of the following two options:

- **Compare, merge, and deploy** – Review the comparison report you generated as part of the pre-upgrade process. If there are modifications that you made to the

process apps that you want to preserve, use SBM Composer to compare and merge your changes and then deploy the process apps.

- **Promote** – Promote the new versions without comparing and merging, which will overwrite your modifications (if any). Promoting the snapshots places the latest contents of the solution, including all reports, notifications, process apps, and auxiliary table data, onto your SBM Server.

The following section describes these options as part of the upgrade process in more detail.

Upgrading the Process Apps

This section describes how to upgrade your 4.0 process apps to version 4.5.

If you began using SOO starting with version 3.1 or 3.5, proceed to [Upgrading All Process Apps \[page 34\]](#). If you upgraded to 3.1 before you upgraded to 3.5, choose one of the following options:

- If you upgraded to version 3.1 and you promoted all the process apps at that time (including the 3.1 version of SSM - Incident Management), follow the steps in [Upgrading All Process Apps \[page 34\]](#) to upgrade your 4.0 process apps to 4.5.
- If you upgraded to version 3.1, but you did not promote the 3.1 version of SSM - Incident Management (preserving either the 2.1 Incident Management or 3.0 Service Desk apps), and you want to continue to use these older versions, follow the steps in [Upgrading All Process Apps Except Incident Management or Service Desk \[page 36\]](#) to upgrade your 4.0 process apps to 4.5.

Upgrading All Process Apps

To upgrade all of your existing 4.0 process apps:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.
2. Log in to SBM Application Repository using the following URL:

```
http://serverName:port/mashupmgr
```

3. Select the **Solutions** tab.
4. Import the SOO 4.5 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SRC - Starter Pack Forms - IT
- SRC - Service Request

-
- SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Incident Management
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Upgrade the Serena Demand Manager app.

If you want to preserve any custom modifications that you made to the SDM process app, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process app instead of promoting it now.

Otherwise, promote the following process apps:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations



Tip: As of version 4.5, the UpdateDemandPlan and CreateDemandPlan orchestrations were moved to the SDM - Demand Manager Orchestrations process app. If you modified these orchestrations in a previous version, you must merge changes that you want to preserve into the new SDM - Demand Manager Orchestrations process app and deploy it after you promote it for the first time.

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Upgrading All Process Apps Except Incident Management or Service Desk

To upgrade your existing 4.0 process apps, but continue to use either the 2.1 version of Incident Management or the 3.0 version of Service Desk:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.
2. Log in to SBM Application Repository using the following URL:

```
http://serverName:port/mashupmgr
```

3. Select the **Solutions** tab.
4. Import the SOO 4.5 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SRC - Starter Pack Forms - IT
- SRC - Service Request
- SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps, except for the SSM - Incident Management process app.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps. (Note that the list excludes the SSM - Incident Management process app):

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Upgrade the Serena Demand Manager app.

If you want to preserve any custom modifications that you made to the SDM process app, follow the steps in [Preserving Changes in the Process Apps \[page 30\]](#) to compare and merge the changes and then deploy the process app instead of promoting it now.

Otherwise, promote the following process apps:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations



Tip: As of version 4.5, the UpdateDemandPlan and CreateDemandPlan orchestrations were moved to the SDM - Demand Manager Orchestrations process app. If you modified these orchestrations in a previous version, you must merge changes that you want to preserve into the new SDM - Demand Manager Orchestrations process app and deploy it after you promote it for the first time.

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Preserving Changes in the Process Apps

This section describes steps you will follow to preserve any changes you made to your current process apps.

If you want to preserve changes that you made to your existing apps, use the **Compare** feature in SBM Composer to copy your modifications into the 4.5 apps and preserve them.

To merge your existing apps with the newer versions and preserve modifications:

1. Launch SBM Composer, and then open the newest version of the process app from the repository (which should appear after you have finished importing the new solutions).



Tip: Make sure not to open the local cache copy of the process app. If you are asked to overwrite or use a local copy, choose to overwrite.

2. Click the Composer button and then **Compare**. Select the option to compare **With Local File**.
3. Select the current version of the file that you saved earlier to create the comparison report. This version should contain all of the changes you have made to date.
4. Use the comparison report that you generated earlier to identify the elements that you want to preserve on the right side. Right-click the element to preserve, and then select **Copy to Open Process App** to copy the change into the new version of the app.



Note: The Compare tool in SBM Composer does not allow you to preserve individual elements of a custom form. If you want to use the new forms and preserve any customizations you might have made, you must merge the entire form and then manually implement your customizations again.

5. Save the changes to the new process app, and then deploy this version. You should now have a modified 4.5 version of the process app in your repository.
6. Repeat these steps for each process app that has changes you want to preserve.

Chapter 6: Upgrading 3.5 Process Apps

This section discusses how to upgrade version 3.5 process apps.

- [About Upgrading \[page 33\]](#)
- [Upgrading the Process Apps \[page 34\]](#)
- [Preserving Changes in the Process Apps \[page 38\]](#)

About Upgrading

This section contains important information about upgrading your process apps from version 3.5. Use this section to help you evaluate the changes that have been made to the process apps and whether or not you want to upgrade to take advantage of the improvements.

Process App Changes

Review the readme file below for a list of changes and new features that were introduced since version 3.5 to help you determine if you want to upgrade your process apps.

- Click [here](#) for a list of features that were added in version 4.0.
- Click [here](#) for a list of features that were added in version 4.0.1.
- Click [here](#) for a list of features that were added in version 4.5.

Importing the Solutions

To begin upgrading your process apps, you must import the new solution files that are delivered by the installer. Importing a solution adds all of the snapshots and process apps for the solution to your SBM Server. The process apps and snapshots are available for promotion or deployment after the import.

Deploying or Promoting the Process Apps

After you import the solutions, you either deploy or promote the associated snapshots into your environment, depending on whether or not you want to preserve changes you might have made to your process apps.

If you are upgrading from an earlier version, it is likely that you modified the process apps; therefore, the solutions that are delivered by the installer are not automatically deployed to your default environment. As part of the upgrade process, you must decide if you want to preserve your modifications or if you want to overwrite the current versions of your process apps.

Therefore, for each process app you want to upgrade, choose one of the following two options:

- **Compare, merge, and deploy** – Review the comparison report you generated as part of the pre-upgrade process. If there are modifications that you made to the process apps that you want to preserve, use SBM Composer to compare and merge your changes and then deploy the process apps.
- **Promote** – Promote the new versions without comparing and merging, which will overwrite your modifications (if any). Promoting the snapshots places the latest contents of the solution, including all reports, notifications, process apps, and auxiliary table data, onto your SBM Server.

The following section describes these options as part of the upgrade process in more detail.

Upgrading the Process Apps

This section describes how to upgrade your 3.5 process apps to version 4.5.

If you began using SOO starting with version 3.1 or 3.5, proceed to [Upgrading All Process Apps \[page 34\]](#). If you upgraded to 3.1 before you upgraded to 3.5, choose one of the following options:

- If you upgraded to version 3.1 and you promoted all the process apps at that time (including the 3.1 version of SSM - Incident Management), follow the steps in [Upgrading All Process Apps \[page 34\]](#) to upgrade your 3.5 process apps to 4.5.
- If you upgraded to version 3.1, but you did not promote the 3.1 version of SSM - Incident Management (preserving either the 2.1 Incident Management or 3.0 Service Desk apps), and you want to continue to use these older versions, follow the steps in [Upgrading All Process Apps Except Incident Management or Service Desk \[page 36\]](#) to upgrade your 3.5 process apps to 4.5.

Upgrading All Process Apps

To upgrade all of your existing 3.5 process apps:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.
2. Log in to SBM Application Repository using the following URL:

```
http://serverName:port/mashupmgr
```

3. Select the **Solutions** tab.
4. Import the SOO 4.5 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 38\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SRC - Starter Pack Forms - IT

-
- SRC - Service Request
 - SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 38\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Incident Management
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Import the Serena Demand Manager solution and promote the following process apps:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations

You must select **All** in each drop-down list in the promotion entities dialog box.

8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Upgrading All Process Apps Except Incident Management or Service Desk

To upgrade your existing 3.5 process apps, but continue to use either the 2.1 version of Incident Management or the 3.0 version of Service Desk:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.
2. Log in to SBM Application Repository using the following URL:

```
http://serverName:port/mashupmgr
```

3. Select the **Solutions** tab.
4. Import the SOO 4.0.1 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 38\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SRC - Starter Pack Forms - IT
- SRC - Service Request

-
- SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps, except for the SSM - Incident Management process app.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 38\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps. (Note that the list excludes the SSM - Incident Management process app):

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Import the new SDM solution and promote the following process apps:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution. Select the **Merge Conflicts** check box during each promotion as well.

8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Preserving Changes in the Process Apps

This section describes steps you will follow to preserve any changes you made to your current process apps.

If you want to preserve changes that you made to your existing apps, use the **Compare** feature in SBM Composer to copy your modifications into the 4.5 apps and preserve them.

To merge your existing apps with the newer versions and preserve modifications:

1. Launch SBM Composer, and then open the newest version of the process app from the repository (which should appear after you have finished importing the new solutions).



Tip: Make sure not to open the local cache copy of the process app. If you are asked to overwrite or use a local copy, choose to overwrite.

2. Click the Composer button and then **Compare**. Select the option to compare **With Local File**.

3. Select the current version of the file that you saved earlier to create the comparison report. This version should contain all of the changes you have made to date.

4. Use the comparison report that you generated earlier to identify the elements that you want to preserve on the right side. Right-click the element to preserve, and then select **Copy to Open Process App** to copy the change into the new version of the app.



Note: The Compare tool in SBM Composer does not allow you to preserve individual elements of a custom form. If you want to use the new forms and preserve any customizations you might have made, you must merge the entire form and then manually implement your customizations again.

5. Save the changes to the new process app, and then deploy this version. You should now have a modified 4.5 version of the process app in your repository.

6. Repeat these steps for each process app that has changes you want to preserve.

Chapter 7: Upgrading 3.1 Process Apps

This section discusses how to upgrade version 3.1 process apps.

- [About Upgrading \[page 39\]](#)
- [Upgrading the Process Apps \[page 40\]](#)
- [Preserving Changes in the Process Apps \[page 44\]](#)

About Upgrading

This section contains important information about upgrading your process apps from version 3.1. Use this section to help you evaluate the changes that have been made to the process apps and whether or not you want to upgrade to take advantage of the improvements.

Process App Changes

Review the readme file below for a list of changes and new features that were introduced since version 3.1 to help you determine if you want to upgrade your process apps.

- Click [here](#) for a list of features that were added in version 3.5.
- Click [here](#) for a list of features that were added in version 4.0.
- Click [here](#) for a list of features that were added in version 4.0.1.
- Click [here](#) for a list of features that were added in version 4.5.

Importing the Solutions

To begin upgrading your process apps, you must import the new solution files that are delivered by the installer. Importing a solution adds all of the snapshots and process apps for the solution to your SBM Server. The process apps and snapshots are available for promotion or deployment after the import.

Deploying or Promoting the Process Apps

After you import the solutions, you either deploy or promote the associated snapshots into your environment, depending on whether or not you want to preserve changes you might have made to your process apps.

If you are upgrading from an earlier version, it is likely that you modified the process apps; therefore, the solutions that are delivered by the installer are not automatically deployed to your default environment. As part of the upgrade process, you must decide if you want to preserve your modifications or if you want to overwrite the current versions of your process apps.

Therefore, for each process app you want to upgrade, choose one of the following two options:

- **Compare, merge, and deploy** – Review the comparison report you generated as part of the pre-upgrade process. If there are modifications that you made to the process apps that you want to preserve, use SBM Composer to compare and merge your changes and then deploy the process apps.
- **Promote** – Promote the new versions without comparing and merging, which will overwrite your modifications (if any). Promoting the snapshots places the latest contents of the solution, including all reports, notifications, process apps, and auxiliary table data, onto your SBM Server.

The following section describes these options as part of the upgrade process in more detail.

Upgrading the Process Apps

This section describes how to upgrade your 3.1 process apps to 4.5.

If this is your first SOO upgrade, proceed to [Upgrading All Process Apps \[page 40\]](#). If you upgraded to 3.1 prior to this upgrade, choose one of the following options:

- If you upgraded to version 3.1 and you promoted all the process apps at that time (including the 3.1 version of SSM - Incident Management), follow the steps in [Upgrading All Process Apps \[page 40\]](#) to upgrade your 3.1 process apps to 4.5.
- If you upgraded to version 3.1, but you did not promote the 3.1 version of SSM - Incident Management (preserving either the 2.1 Incident Management or 3.0 Service Desk apps), and you want to continue to use these older versions, follow the steps in [Upgrading All Process Apps Except Incident Management or Service Desk \[page 42\]](#) to upgrade your 3.1 process apps to 4.5.

Upgrading All Process Apps

To upgrade all of your existing 3.1 process apps:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.
2. Log in to SBM Application Repository using the following URL:

```
http://serverName:port/mashupmgr
```

3. Select the **Solutions** tab.
4. Import the SOO 4.5 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 44\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SRC - Starter Pack Forms - IT

-
- SRC - Service Request
 - SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 44\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Incident Management
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Import the new SDM solution and promote the following process apps:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations

You must select **All** in each drop-down list in the promotion entities dialog box.

8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Upgrading All Process Apps Except Incident Management or Service Desk

To upgrade your existing 3.1 process apps, but continue to use either the 2.1 version of Incident Management or the 3.0 version of Service Desk:

1. Install and configure the latest version of SOO as described in [Chapter 3: Upgrading the Installation \[page 15\]](#). This upgrades the SOO framework files.
2. Log in to SBM Application Repository using the following URL:

```
http://serverName:port/mashupmgr
```

3. Select the **Solutions** tab.
4. Import the SOO 4.5 solutions. Click the **Import** button to begin importing a solution.
5. Upgrade the Serena Request Center apps.

If you want to preserve any custom modifications that you made to the SRC process apps, follow the steps in [Preserving Changes in the Process Apps \[page 44\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps:

-
- SRC - Starter Pack Forms - IT
 - SRC - Service Request
 - SRC - Knowledge Management



Important: You must promote the SRC apps in a specific order, because the Starter Pack and Service Request process apps contain unique references to one another. This ensures that the proper forms in the Starter Pack process app are available for use in each of the services. Promote the SRC apps in the following order:

- a. **SRC - Starter Pack Forms – IT**
- b. **SRC - Service Request**
- c. **SRC - Starter Pack Forms – IT** (promote again)
- d. **SRC – Knowledge Management**

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

6. Upgrade the Serena Service Manager apps, except for the SSM - Incident Management process app.

If you want to preserve any custom modifications that you made to the SSM process apps, follow the steps in [Preserving Changes in the Process Apps \[page 44\]](#) to compare and merge the changes and then deploy the process apps instead of promoting them now.

Otherwise, promote the following process apps. (Note that the list excludes the SSM - Incident Management process app):

- SSM - Change Management
- SSM - Configuration Management System
- SSM - Problem Management
- SSM - Integrations (only promote this app if you are using Serena Asset Manager or the Asset Discovery Adapter)

You must select **All** in each drop-down list in the promotion entities dialog box to upgrade the entire solution.



Note: Select the **Merge conflicts** option if you have already promoted an earlier version of the snapshot to the target environment and you want to preserve changes that you made to the existing application. For example, if you want to keep new user roles that you added to an application, select the **Merge conflicts** check box to preserve them in the target environment after the promotion. If **Merge conflicts** is not selected, the existing entities will be deleted in the target environment.

7. Import the new SDM solution and promote the following process apps:

- SDM - Demand Plan
- SDM - Business Requests
- SDM - Demand Manager Orchestrations

You must select **All** in each drop-down list in the promotion entities dialog box.

8. Launch Serena Request Center, click **Customize**, and select **Service Request Catalog**. Review each service request and service request category in the Request Center to ensure accuracy and uniqueness.

Preserving Changes in the Process Apps

This section describes steps you will follow to preserve any changes you made to your current process apps.

If you want to preserve changes that you made to your existing apps, use the **Compare** feature in SBM Composer to copy your modifications into the 4.5 apps and preserve them.

To merge your existing apps with the newer versions and preserve modifications:

1. Launch SBM Composer, and then open the newest version of the process app from the repository (which should appear after you have finished importing the new solutions).



Tip: Make sure not to open the local cache copy of the process app. If you are asked to overwrite or use a local copy, choose to overwrite.

2. Click the Composer button and then **Compare**. Select the option to compare **With Local File**.
3. Select the current version of the file that you saved earlier to create the comparison report. This version should contain all of the changes you have made to date.

-
4. Use the comparison report that you generated earlier to identify the elements that you want to preserve on the right side. Right-click the element to preserve, and then select **Copy to Open Process App** to copy the change into the new version of the app.



Note: The Compare tool in SBM Composer does not allow you to preserve individual elements of a custom form. If you want to use the new forms and preserve any customizations you might have made, you must merge the entire form and then manually implement your customizations again.

5. Save the changes to the new process app, and then deploy this version. You should now have a modified 4.5 version of the process app in your repository.
6. Repeat these steps for each process app that has changes you want to preserve.

Chapter 8: Post-Upgrade Tasks

This section describes tasks that you perform after you upgrade your installation.

Updating Service Requests in Serena Request Center

- Each service request definition in Serena Request Center requires its own project. This means you must review all the service requests in the entire catalog and set the correct project or create new projects for them.



Note: The service requests and projects must have a one-to-one relationship. This means each service request must have a dedicated project; the same project cannot be selected in multiple service requests.

- Log in to the Request Center and set the display order for service request categories and service requests.
- When you promote the Starter Pack Forms, new Starter Pack Service Requests are added to the catalog. You may want to disable these service requests by hiding them in Serena Request Center. Refer to the *Serena Orchestrated Ops Getting Started Guide* for a list of these service requests.

Preparing the System for Use

- After you have promoted the SRC - Service Request snapshot, configure the **Requests** view in Request Center to point at the "Requests Center - My Requests" report contained in the snapshot. See *Serena Orchestrated Ops Getting Started Guide* for details on configuring Request Center.
- If you also have SSM, modify the multi-table report, "Requests Center - My Requests," under the Service Request solution tab to include the Incident Management table. This allows users to see incidents that they have submitted in Request Center.
- If you also have SDM, modify the multi-table report, "Requests Center - My Requests," under the Service Request solution tab to include the Demand Plans table. This allows users to see project proposals that they have submitted in Request Center. See *Serena Orchestrated Ops Getting Started Guide* for details on configuring the Requests view.
- Determine if you need to configure your orchestrations to be authenticated under a specific user account as described in the "Setting Authentication for Orchestrations" topic in the *Serena Orchestrated Ops Installation and Configuration Guide*.
- Add auxiliary data, set default field values, assign users to appropriate roles, and define SLAs as described in the *Serena Orchestrated Ops Getting Started Guide*.