

# MATCHPOINT®

CHANGE MANAGEMENT TOOL FOR IBM i5 & MULTIPLATFORM

## CONFIGURATION GUIDE

Version 4.0

IBM Server *Proven™*



## Table of Contents

<b>1</b>	<b>BASICS .....</b>	<b>3</b>
1.1	LICENSE AND MODULES .....	3
1.2	GENERAL PARAMETERS.....	3
1.3	USER GROUP .....	4
1.4	DEPARTMENT .....	4
1.5	USER.....	4
1.6	LOCATION .....	5
1.7	OBJECT TYPE.....	5
<b>2</b>	<b>APPLICATION.....</b>	<b>5</b>
2.1	APPLICATION .....	5
2.2	SUBSYSTEM .....	5
2.3	VERSION .....	6
2.4	USER APPLICATION .....	6
2.5	ENVIRONMENT.....	6
2.6	ENVIRONMENT-LOCATION .....	7
2.7	PROMOTION PATH .....	7
2.8	CHANGE REQUEST STATUS .....	8
2.9	STATUS SEQUENCE .....	8
2.10	CHANGE REQUEST TYPE .....	8
<b>3</b>	<b>USER RIGHTS .....</b>	<b>8</b>
3.1	USER FIELDS .....	8
3.2	USER STATUS .....	8
<b>4</b>	<b>PROJECT .....</b>	<b>9</b>
4.1	ACTIVITY .....	9
4.2	CUSTOMER .....	9
4.3	PROJECT ROLE .....	9
4.4	PROJECT .....	9
4.5	PROJECT MEMBER .....	9
<b>5</b>	<b>PLEX IMPORT.....</b>	<b>10</b>
5.1	PLEX IMPORT PARAMETER .....	10
5.2	PLEX TRIPLE MATCH .....	10
<b>6</b>	<b>OTHER .....</b>	<b>10</b>
6.1	PERSONAL DEVELOPER ENVIRONMENT .....	10
6.2	E-MAIL CONFIGURATION.....	11
6.3	FTP SERVER .....	11
6.4	USER DEFINED PROCESS .....	11
<b>7</b>	<b>CONTACT .....</b>	<b>12</b>

## INTRODUCTION

This configuration guide will lead you step by step through the configuration of your MATCHPOINT installation. This document is intended to make sure you follow the right sequence of the configuration steps.

# 1 BASICS

## 1.1 License and Modules

*Menu/Help/About/License...*

- Enter the modules that you have purchased. (Button *Modules*)
- Number of users has to be entered on the module *Base Product*
- Enter date in Valid until, if the license is temporary
- The ISV module needs a number in amount (number of managed customer environments)
- Enter system name, license type, license code (sent to you by Heinrich Informatik AG) and press *OK*. The license status will turn *Active*. Press *Exit*.

## 1.2 General Parameters

*Menu/Master Data/Edit Parameters...*

- Enter library names (create the libraries manually)
- Enter system name, where MatchPoint is installed
- Document server address – Format: [\\server\directory\subdirectory](#)
- Mail program: only iSeries server mail is supported
- Default data management: the selected value is the default when adding a physical file to a promotion
- CR Status before promotion: if specified, this status is the status that a change request must have in order to be promoted. If not specified, “Ready for Promotion” will be used. Status can also be specified on an environment level (or both).
- CR Status after promotion: if specified, this status will be set on a promoted change request. If not specified, “Promoted” will be used. Status can also be specified on an environment level (or both).
- Consolidate Promotions: Yes is recommended. If an object occurs in more than one promotion within a change request, it will only be promoted once.
- Check Object Version: Yes is recommended. If yes, the version of IBM System i objects are checked before promotion.
- Promote Object Sources: this only affects System i objects. Further configuration is needed on environments, locations and object types
- Store Filter Values: Yes is recommended. If selected, filter values in various functions are stored and retrieved when calling the function again.
- If you check Use User Application, configure User Application at 2.4
- Time Sheet From-to: If selected, hours in the time sheet are calculated by the times entered.

- Use colours: only effective in combination with the ISV module. Change Requests are colour coded according to their installation status for selected customers.

### 1.3 User Group

*Menu/Master Data/Edit user groups...*

- Create at least one user group as Administrator and add a user to this group. Only users in administrator group can access the master data.
- CR List: only a Standard List is available, select 'Standard'
- Change only own CR: if selected, a user can only change a change request, if he is assigned to it in any role (requester, developer, tester, web designer).
- Show only own CR: if selected, a user can only see a change request, if he is assigned to it in any role (requester, developer, tester, web designer).
- Create CRs: if selected, a user is allowed to enter change requests into the system
- If you check *Use Status Rights*, configure 3.2
- If you check *Status Sequence*, configure 2.9
- If you check *Use Field Rights*, configure 3.1
- Edit Promotions: if selected, a user is allowed to edit promotions and promotion objects.
- Show cumulative: if selected, a user can see cumulative change requests.
- Show deleted CR: if selected, a user can see deleted change requests (grey background colour)
- Promotions rights: select a level between 1 and 5. Environments have a level assigned to them. A user needs a promotion rights level assigned that is equal or higher in order to be able to promote objects into the environment.
- Same as Promotion rights, but takes effect if the user is the requester of a change request.
- Work with Projects: Allows the user to work with projects
- Work with Customers: Allows the user to work with customers
- Time sheet: Allows the user to record hours in time sheets.

### 1.4 Department

*Menu/Master Data/Edit departments...*

- Add departments (optional)

### 1.5 User

*Menu/Master Data/Edit users...*

- Add users and assign them to a user group. Make sure at least one user is in an administrator user group. The user count tells you how many users are entered in the system. Don't add more users than you are licensed for.

## 1.6 Location

*Menu/Master Data/Edit locations...*

- Add the locations in your environments.

Example:

Client Programs (Type: File System)

Server Programs (Type: iSeries Objects)

Database (Type: iSeries Database Objects)

(You can add as many locations as you need. Later in the configuration process, you can specify libraries and directories for each environment and location.)

The *Location Prefix* will only be used for creating *Update Packages*.

If you are using Update Packages, make sure to assign a unique Prefix for each location.

## 1.7 Object Type

*Menu/Master Data/Edit object types...*

The object type table contains some example data. You can use these object types and add new ones.

- Assign a location to every object type! If the location is missing, the promotion process will fail.

For object types in the file system, the *Extension* must match the file extension.

For System i objects, the correct type and attribute must be assigned.

The *source file* only needs to be entered, if you want to promote source objects.

Otherwise, it can be left empty.

# 2 APPLICATION

## 2.1 Application

*Menu/Master Data/Edit applications...*

- Add the applications you want to manage with **MATCHPOINT**

- Assign an application owner

## 2.2 Subsystem

*Menu/Master Data/Edit applications/Edit subsystems...*

- Add subsystems to the applications. This will help to structure the application and filter the change requests.

## 2.3 Version

*Menu/Master Data/Edit applications/Edit versions...*

- Add versions for each application. (The configuration for the deployment will all be on a version level. Also, the change request will be assigned to a version).  
If the status on a version is set to *inactive*, the change requests of this version will not be shown on the change request overview panel.

## 2.4 User Application

*Menu/Master Data/Edit users/Edit user application (AP)...*

- Select a user and assign all the applications the user can work with.  
To work with user application, check *User Application* on the *General Parameters* (1.2)

## 2.5 Environment

*Menu/Master Data/Edit environments...*

- Add the environments of your applications.  
**Environment:** Assign a code (key attribute)  
**Environment Description:** Enter a description of the environment  
**Type:** Development  
**Promotion Rights:** Level 1 (the user group needs a least this level assigned to promote into this environments)  
**Server Type:** IBM System i  
**Server Name:** MySystemi  
**Backup Library:** XYBACKUP (make sure the library exists on the server) This library will be used to store savefiles with backup objects.  
**System i Job Description:** Enter Job Description "library/jobd". This will be used to update the application INI-file. Job description must exist in the specified library on the specified System i server.  
**System i Port Number:** Enter Port Number. This will be used to update the application INI-file. Port Number will be used for Client/Server communication. Port must be available.  
**System i Code Page:** Enter Code Page. This will be used to update the application INI-file. To determine the correct Code Page, please refer to the AllFusion Plex Help.  
**Directory Extern:** [\\server\directory](#)... (only needs to be specified if you work with update packages) Also, set the environment type to "Update Package".  
**Library Extern:** (only needs to be specified if you work with update packages)  
**Process before promotion:** if you have user defined processes that have to run before and/or after a promotion, you can assign them to an environment.  
**Process after promotion:** see above.  
**Customer Promotion:** Only for ISV-Module. Select Yes, if this is the environment from where you distribute the updates to the customers. Please refer to the ISV documentation.  
**Customer:** Only for ISV-Module. Assign customers to the customer environments.

### **INI file entries:**

Whenever you update or insert an environment, the necessary entries are made to the application INI-file. When working with a new INI-File (on another client, for instance), you can use the 'Update INI-file' button to add all environments to the INI-file.

## **2.6 Environment-Location**

*Menu/Master Data/Edit environments/Assign location to environment...*

Select an environment and assign the locations to this environment. For each assigned location, you can specify the libraries and directories, depending on the location type.

You only need to specify the *library sources* and the *backup library sources*, if you are deploying source objects on the IBM System i. Otherwise, leave this empty.

If you select *Delete Objects*, the objects will be deleted from the source environment after the promotion.

Make sure the source and the target environment have the same locations assigned and the libraries and directories specified! Otherwise, the promotion process will fail.

For an environment of type "Update Package", no locations need to be assigned.

## **2.7 Promotion Path**

*Menu/Master Data/Edit applications/Edit versions/Edit promotion path...*

For each version of your applications, you can now specify the sequence of the environments, the so called promotion path.

Add the environment and assign a (unique) sequence number.  
(Example: Development XY = 1, Test XY = 2, Production XY = 3)

Promotion iSeries: Use *Netfile*, if you are not creating update packages. This option will promote directly into the target environment.

If you use *Package*, the promotion process will create an update package. In order to use this option, the third party product ZipGenius 5 has to be installed on your workstation. On the target environment, the *Directory Extern* and *Library Extern* need to be specified. If you have an FTP Server specified, the update package can be transferred to this server automatically.

When using the ISV Module, you can have several environments with the same sequence number. In this case, the promotion process will ask you in which environment to promote. Typically this would be used for multiple customer environments that are being delivered with updates from one environment.

## 2.8 Change Request Status

*Menu/Master Data/Edit CR Status ...*

- A number of statuses are generated automatically by MATCHPOINT. You can add any status you like. The status with the lowest sequence number will be used as a default when adding a change request. Other than that, the sequence number has no functionality.

## 2.9 Status Sequence

*Menu/Master Data/Edit CR Status/Edit status sequence (SQ)...*

- For each status, you can specify which status can potentially follow. To activate this functionality, check *Status Sequence* on the *User Group*. Once activated, the user can only set the status of a change request according to the current status and the potentially following statuses.

## 2.10 Change Request Type

*Menu/Master Data/Edit CR Type...*

- CR Types allow to structure (filter and sort) your change requests.

# 3 USER RIGHTS

## 3.1 User Fields

*Menu/Master Data/Edit user groups/Edit user fields...*

To activate this functionality, check *Use Field Rights* on the *User Group*. You can specify each attribute of the change request with an authority to 'view' (the user is allowed to see the field content) or to 'edit' (the user is allowed to change the field content). If a field is not specified, the user will not be able to see it and change it.

## 3.2 User Status

*Menu/Master Data/Edit user groups/Edit user status...*

To activate this functionality, check *Use Status Rights* on the *User Group*.

You can specify if a user can view and/or edit a change request with a specified status (*Change CR* and *View CR*).

You can also specify if a user is authorised to change the status of a change request to a certain status (*Set Status*).

Once you activate this functionality, make sure to configure this carefully.

## **4 PROJECT**

### **4.1 Activity**

*Menu/Master Data/Edit activities...*

- Activities will be used for time sheets.

### **4.2 Customer**

*Menu/Master Data/Edit customers...*

- A customer can have projects assigned. This information can be used to specify the customer that will be billed for the recorded hours of the change requests.
- You can also assign a change request to a customer.
- ISM-Module only: You can assign a customer to an environment in order to promote updates directly to the customer's environment.

### **4.3 Project Role**

*Menu/Master Data/Edit project roles...*

- Enter the project roles that you want to assign to project members.
- The attributes '*Time Sheet Administration*' and '*Assign Change Request*' are informative at the moment. They will be used in future releases.
- The attribute '*Project Manager*' defines a role as such and can be used for reporting purposes.

### **4.4 Project**

*Menu/Select/Edit Projects...*

- Projects can be entered with some basic data. Projects can be used to group change requests. By assigning a customer to a project, the recorded hours on the change requests can be assigned to a specific customer. You can filter change requests by projects.

### **4.5 Project Member**

*Menu/Select/Edit Projects/Project Members...*

- Assign users to a project and assign a project role to each project member.

## 5 PLEX IMPORT

### 5.1 *Plex Import Parameter*

*Menu/Master Data/Configure Plex Import...*

When configuring the Plex Import Module, you need to have Plex 5.5 SP1 started on your workstation.

Enter one *Plex Import Parameter* record. It's possible to have multiple parameter sets, but only one can be active at the time. This will be the one that is used when importing objects from the Plex model.

Refer to the Plex Import Module Documentation for the explanation of the parameters.

### 5.2 *Plex Triple Match*

For each *Plex Import Parameter* record, you can specify the *TripleMatch* entries. Again, refer to the Plex Import Module Documentation for the explanation of the *TripleMatch* entries.

## 6 OTHER

### 6.1 *Personal Developer Environment*

*Menu/Edit Users/Edit Developer Environment...*

For every developer, you can specify a personal developer environment.

- Select the environment (select the development environment - which is basically the first environment in the promotion path. The personal environment is like another environment before the common development environment).
- select a location (double click). (You can add personal environments for selected locations only, i.e. only the client objects, but not the iSeries objects. Or you can of course specify it for every location)
- specify the directories and/or libraries for the selected locations

Once you have configured the personal developer environment, this will affect the *System i Import* and the *File System Import*, because MatchPoint assumes that you want to import objects from your personal environment (no effect on the Plex import though).

When you leave the function *Edit Promotion Objects* after adding objects to your promotion, MatchPoint will ask you if you want to promote the objects to the common developer environment. Yes - the objects will be moved/copied to the development environment, No - no object is moved/copied to the development environment. The only thing you have to make sure is that you do it at one point before you promote the change request into testing.

It is quite common to check the option *Delete Objects*. This way you only have objects in your personal environment you're currently working on, and once you move them into the common development environment, they are deleted from your personal environment. This works well with client objects as well as iSeries objects (put the personal libraries on top of the library list).

## 6.2 E-Mail Configuration

*Menu/Master Data/Edit Applications/Edit Version/Edit E-Mail Configuration...*

- Define an environment type and a change request status and check the user that should receive an e-mail notification every time a change request is changed to this status in the specified environment type.

## 6.3 FTP Server

*Menu/Master Data/Edit FTP Server...*

- FTP servers will be used when you choose the promotion type '*Update Package*'. If you define an FTP server, the update package can be transferred to this server automatically. Be aware that the FTP password is stored unencrypted on the iSeries.

## 6.4 User Defined Process

*Menu/Master Data/Edit User Defined Processes...*

- User defined processes can be assigned to environments. They will be executed every time this environment is the source or the target of a promotion. At the moment, only client processes are possible. Only the Windows File must be specified. This will be the file executed. The flag *Wait for process to end* will make the promotion process wait until the user defined process has ended and then continue.

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