

Best Practices for Successfully Patching Service Desk Manager

Presented by

CA Technologies Service Desk Support

Telephone Audio:

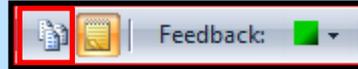
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agility
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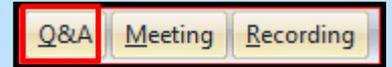
Logistics

1 Download handouts

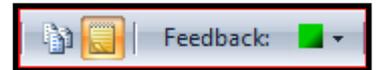


2 Submit questions to Q&A folder; conduct Q&A at end of session

3 Report issues during the session using Live Meeting Chat or



4 Session is being recorded and available after session via email



5 Provide feedback via online evaluation before the end of this seminar

6 Lines are muted

Best Practices for Patching Service Desk Manager

Presenters



Karen Matoke, Principal Support Engineer

- Located in London, England, United Kingdom
- 3+ years experience with CA Service Desk Manager
- Previous experience includes roles in Sustaining Engineering and in Product Development for database and for network management applications.



Richard Ritter, Sr. Support Engineer

- Located in New York
- 10 years experience with CA Service Desk Manager

Best Practices for Patching Service Desk Manager

Importance and outcomes

Importance:

- Reduce or eliminate the possibility of encountering problems that have been solved since General Availability (GA)
- Minimize time to resolution for newly discovered problems
- Obtain functionality supporting new integrations

Description:

- Learn patching best practices based on experience

Learning Outcomes:

- Refresh on patch terminology
- Recognize the need and importance of patching
- See a demonstration of how to patch the product
- Apply patch management process & best practices



Best Practices for Patching Service Desk Manager

Agenda

Present and Demonstrate Best Practices:

- Review Summary of Stages
- Get Ready!
- Review & Decide
- Plan, Test, Verify
- Apply in Production
- Ongoing



Best Practices for Patching Service Desk Manager

Polling question: Experience level applying patches

What level of experience do you have applying patches to CA Service Desk Manager ?

1 None

2 A little

3 Some

4 A lot

Best Practices for Patching Service Desk Manager

Best Practices summary



Get Ready!

- Know patch basics & purpose of patching
- Know your environment & configuration
- Know your internal requirements, policies & procedures for patching in test & production

Review & Decide

- Review list of available patches
- Review readme file
- Review post installation notes
- Assess impact on customizations

Plan, Test, & Verify

- Prepare one or more test environments
- Plan & schedule selected patches in test and production environments
- Verify patches after applying
- Customized environments: compare results in customized environment with results in a patched out-of-the-box test environment

Apply to Production

- Apply patches to production

Ongoing

- Subscribe to hyper patch notifications
- Regularly review announcements about patches and plan to apply ASAP

Get Ready!

Goal of patch management

A patch is

Software designed to:

- Update a product
- Update a product's supporting data
- Fix one or more problems in a product

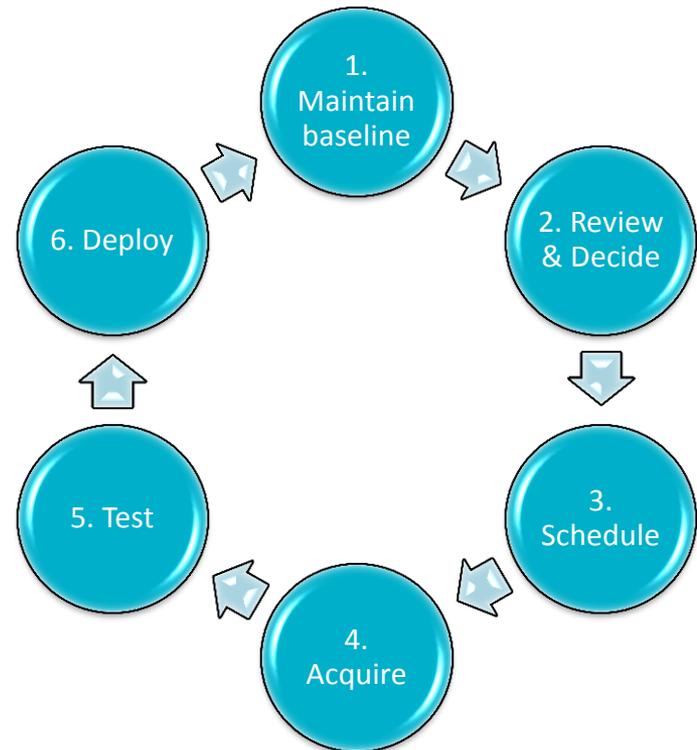
Patch management is

The process of using a strategy and plan of what patches should be applied to which systems at a specified time

The value and benefit of applying a patch management process is

A proactive and continuous process to:

- Fix security vulnerabilities
- Take advantage of new technology
- Improve usability or performance
- Support new integrations with other CA and third party products



Get Ready!

Maintenance elements and their purposes

Fix strategy

Problem

Solution

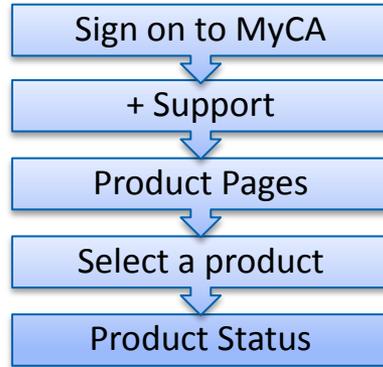
Component
Patches

Cumulative
Patch

Test Fix
(Test Patch)

Get Ready!

Where to find the CA Service Desk Manager Fix Strategy



The screenshot shows the CA Service Desk Manager Product Page. The 'Product Status' tab is selected under the 'Product Support Lifecycle Matrix' section. The page lists several links related to the product's lifecycle and support, including 'CA Service Desk Manager Gold Key Page', 'Service Management Roadmap and Strategy Webcast', and 'CA Service Desk Manager Fix Strategy'.

The screenshot shows the 'CA Service Desk Manager Fix Strategy' page. The page includes a date of July 24, 2012, and a section titled 'Installation and Maintenance Methodology'. The text describes the product installation and maintenance methods, including Service Packs, Cumulative Published fixes, and Individual Test fixes. It also mentions the 'ApplyPTF' tool and the 'InstallShield' type program.

Installation and Maintenance Methodology

CA Service Desk Manager product installation is provided via an InstallShield type program which prompts for product selection and then continues to install the product in the designated directory. The product is available on either DVD or electronic delivery.

CA Service Desk Manager maintenance may be provided via Service Packs, Cumulative Published fixes, and Individual Test fixes. The preferred published maintenance methodology for CA Service Desk Manager, based on substantial customer feedback, is Cumulative Published Patches. This is available via electronic delivery in the format of zip files that are implemented using the ApplyPTF tool.

Individual unpublished test fixes may be provided on a case by case basis if the fix in question is not available in any published cumulative patch. This is accomplished by opening a Technical Support STAR Incident. This is delivered via zip files and implemented via the ApplyPTF tool. An individual test fix will contain all maintenance up to a known date for the area of code being fixed.

Cumulative Published Patches contain previously published PTFs and are delivered periodically to ease application maintenance. This ensures that your CA Service Desk Manager implementation is kept up to date with all of the latest unpublished (but customer verified) Individual Test fixes along with all previous published PTFs - simplifying the maintenance of your system as well as helping the support team keep your system running at peak performance. The cumulative patches will be provided at the component level - Server, Web Server, Web Screen Painter, Reporting, etc. As a result, customers will only need to apply a few patches, at most, to bring your implementation up to the current, fully patched, maintenance level allowing for rapid adaptation. Moreover, this will reduce complex individual fix patch levels allowing for rapid CA Support reproduction and response times. Lastly, this cumulative model ensures that the collection of individual test fixes will interoperate as a full QA cycle is done during our cumulative patching phase.

Service packs may contain new fixes and include all previously published individual fixes, cumulative fixes, or service packs, and it is provided via an InstallShield type program which prompts for product selection and then continues to install the product in the designated directory. The Service Pack is available on either DVD or electronic delivery.

CA Service Desk Manager has the components of CA CMDB, CA Service Desk, CA Service Desk Knowledge Tools and CA Support Automation.

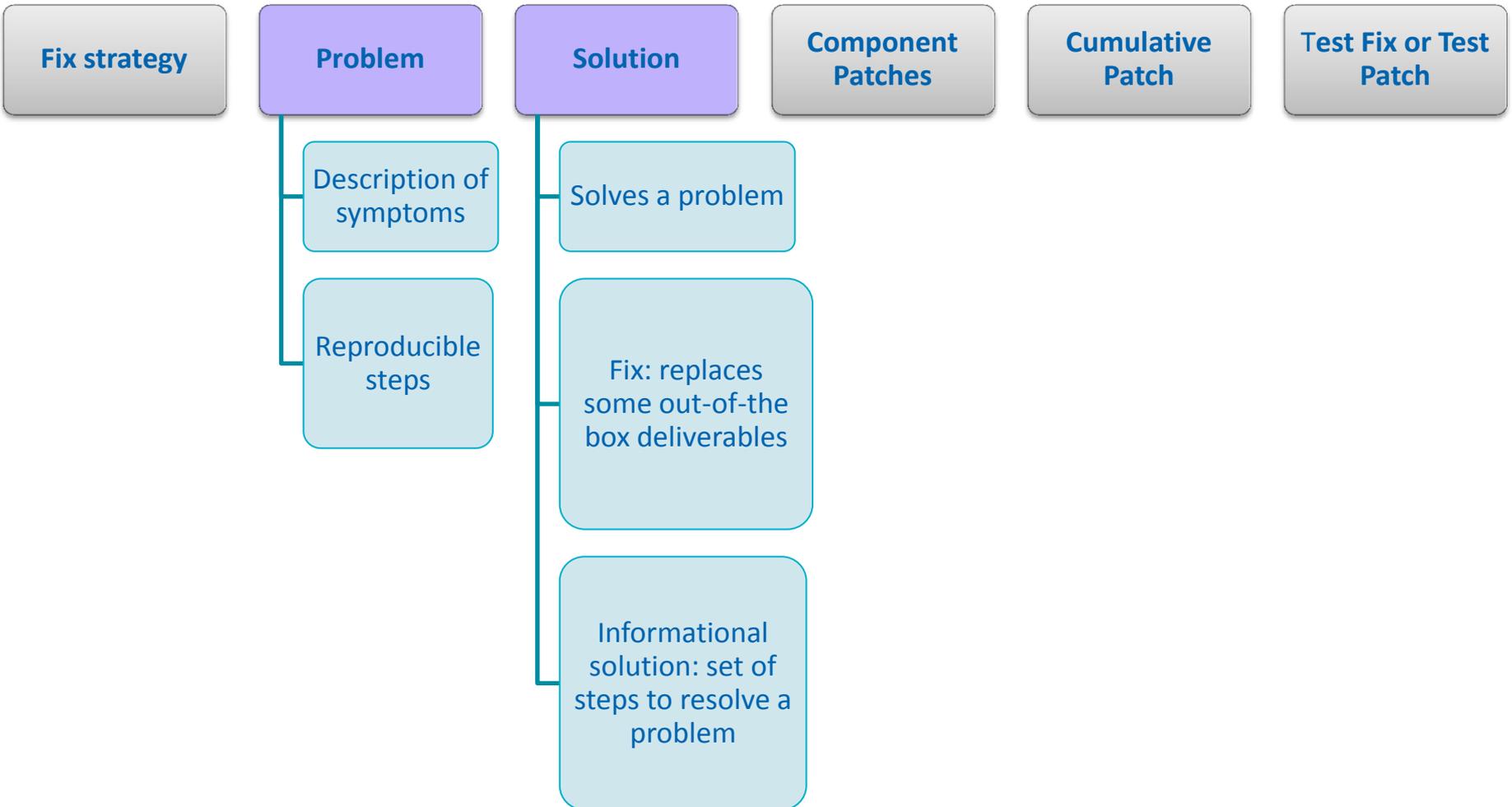
Maintenance Delivery & Timeframes for GA version of CA Service Desk Manager

CA Service Desk Manager provides maintenance using the following delivery methods. The goal of the CA Service Desk Manager product team is to generate these deliveries using the following guidelines:

- Individual Unpublished Test Fixes as necessary

Get Ready!

Maintenance elements and their purposes



Get Ready!

Sample Problem

Problem: USRD 2281

Release: 12.6

Title: MISSING COMMENT FIELD OF ORGANIZATION OBJECT IN MAJIC LAYER

Description:

The 'comment' attribute on the org factory is not available in Web Screen Painter to be used in forms. This is because the 'comment' column on ca_organization table exists in the MDB and schema layer but it was missed in the majic layer. The same field is also referenced in the 'Technical Reference Guide'.

Steps to reproduce: Running 'bop_sinfo -a org' does not list the 'comment' attribute

Link: <https://support.ca.com/irj/portal/kbproblem?productcd=USRD&problemnbr=2281>

Solved in: Service Desk Manager r12.6 Cumulative #3

Best Practices for Patching Service Desk Manager

Polling question

Might a cumulative patch consist of more than one patch?

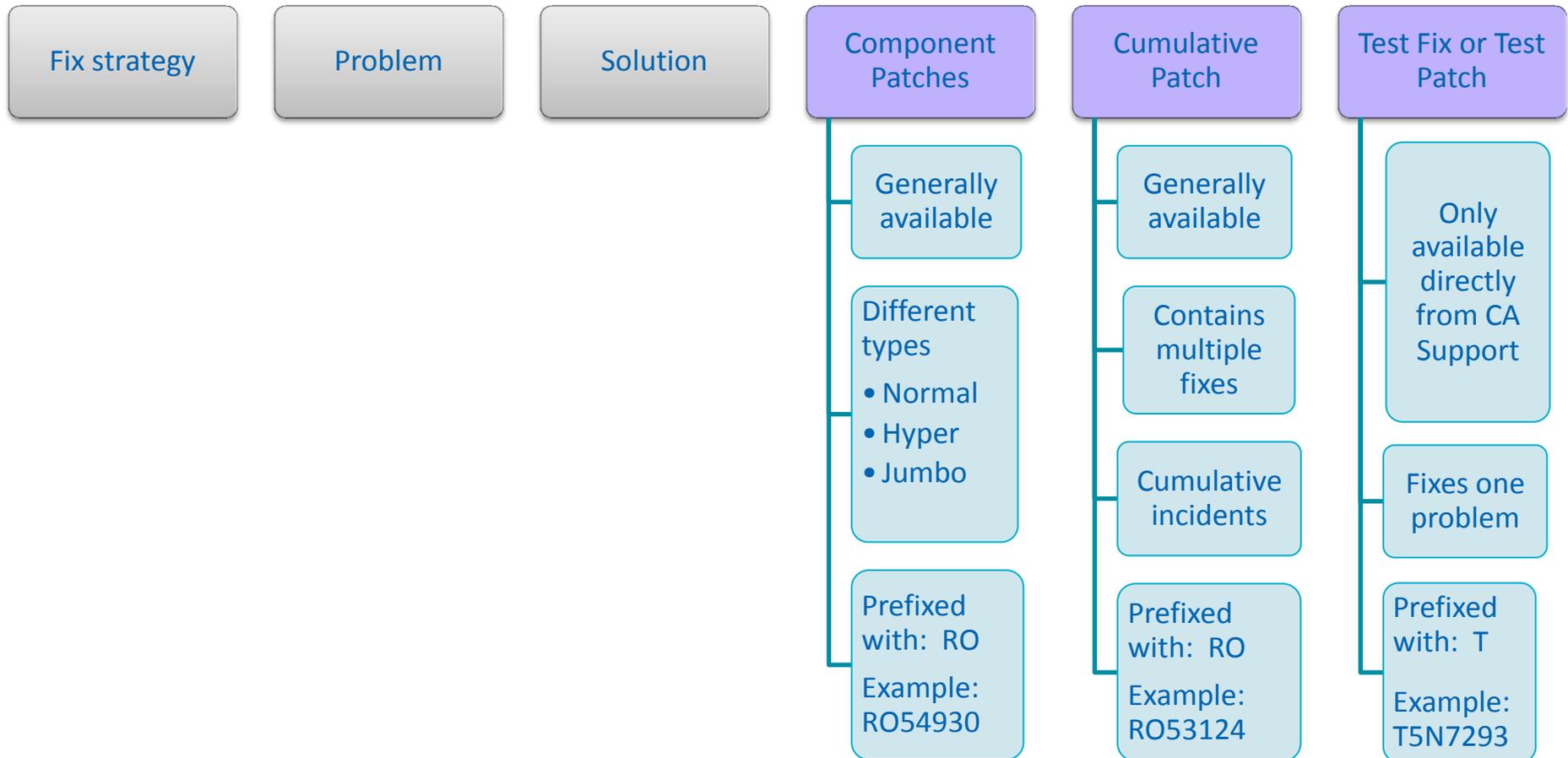
1 Yes

2 No

3 I don't know

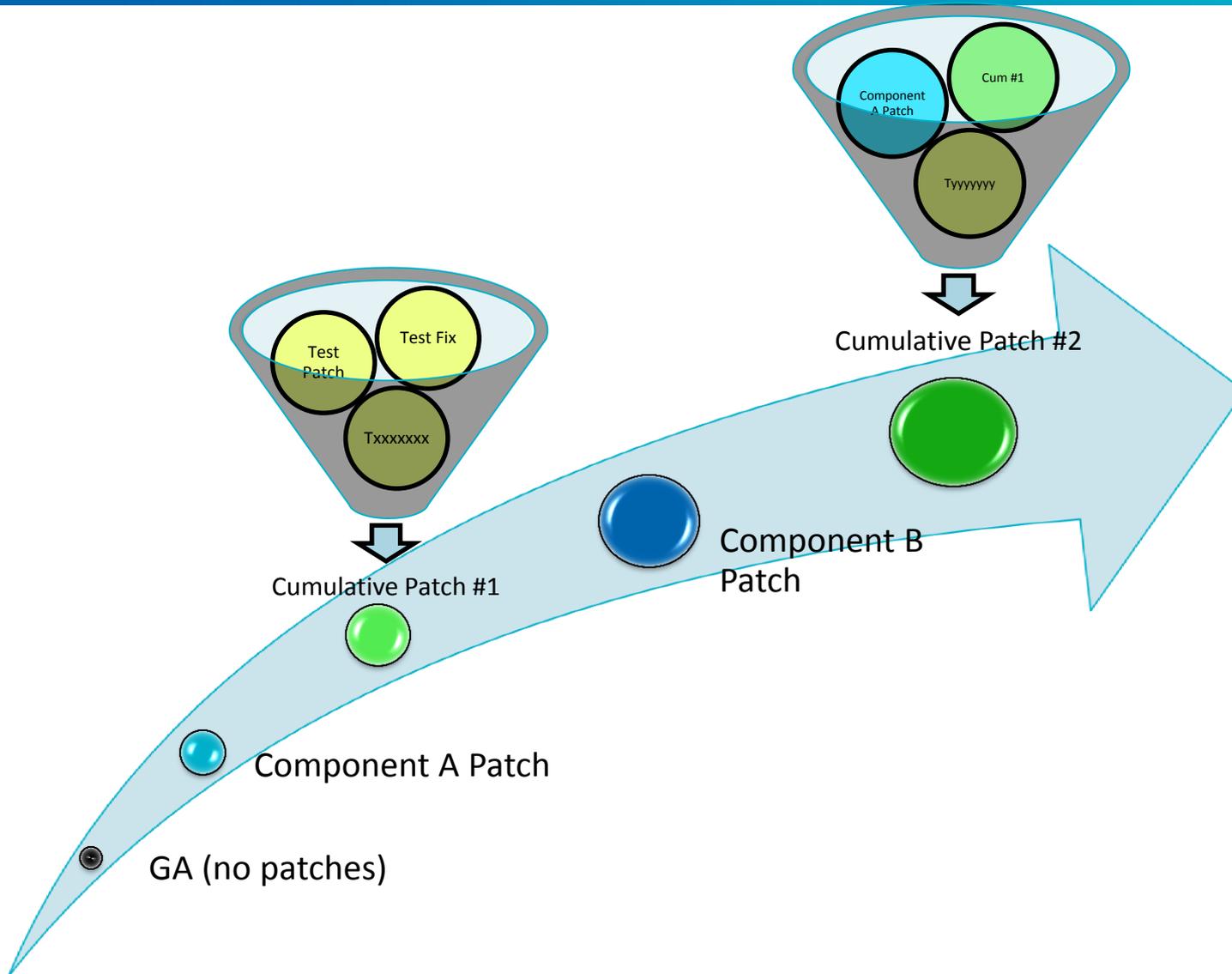
Get Ready!

Maintenance elements and their purposes



Get Ready!

Patch timeline



Get Ready!

Know your environment

Architectural Components

- Operating System, DBMS, Web Server, Web Browsers, etc.

Service Desk configuration

- Primary and Secondary servers
- Integrations
- Options Manager options
- pdm_edit configuration variations

Know Passwords for tools

- configure tool: pdm_configure

Type of Environment

- Production
- User Acceptance Test (UAT)
- Development



Best Practices Summary

Review & Decide



Get Ready!

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Ongoing

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Best Practices for Patching Service Desk Manager

Polling question

Is it OK to run with test patches applied to a production system and never apply any of the cumulative patches?

- | | |
|----------|--------------|
| 1 | Yes |
| 2 | No |
| 3 | I don't know |

Review & Decide

Can I get notified about hyper patches?



<https://support.ca.com/irj/portal/hyperSubscription>

My CA

Support > Subscriptions > Hyper Subscriptions

Support

- Home
- Advanced Search
- Support By Product
- Open a Case
- View Cases
- Download Center
- Documentation
- Licensing
- Documentation
- Licensing
- Go Live with CA Technologies
- Project Management
- User Administration
- CA Programs
- CA Programs
- Compatibilities
- Additional Site Access
- Subscriptions**
 - CA Tech Insider Subscriptions
 - Hyper Subscriptions
- Contact and Resources

Hyper Subscriptions

Use this page to request automatic notification of hyper solutions that are considered critical for the proper operation of your CA product. The component list that is displayed represents the components and/or products for all of the licensed products for your site. You may request notifications for all components/products you are licensed for or only for desired components/products.

To receive notifications for all of the components for a product, select a Product and Release and click Add Products. To view components of a product, select the Product and Release and then click View Components. A list of the product's components will be displayed. You can return to the component list to click Add Products or, optionally, to manually place a check next to each desired component name and click Update to save your choices.

Note: Clicking the Add Products button before the Update button will erase the selection of any manually-selected unsaved components/products from this list.

Select a Product
CA Service Desk Manager Full License - MULTI-PLATFORM

Select a Release:
--Select--
--Select--
12.7
12.6
No 12.5
12.1
No 12.0
11.2

[View Components](#)

Notes, Downloads, Most Recent Knowledge Based Articles, and more.

Select a Product Page: Don't see your product name below?

Select a Product

Product Support Lifecycle Matrix

Product Specific Support:

- Next-Generation Mainframe Management
- CA ARCserve
- CA ERwin®
- CA ControlMinder
- CA IdentityMinder

CA Technologies

- MyCA Support Resources
- Additional CA Resources
- Important Notices
- Vulnerability Alerts
- Acquired Product Support
- Security Advisor
- Site Feedback
- Subscriptions
 - CA Tech Insider
 - Hyper Subscriptions

Review & Decide

Where can I find announcements about patches?



Sign on to MyCA

+ Support

Product Pages

Select a product

News

The screenshot shows the CA Technologies website interface. The browser address bar displays the URL: https://communities.ca.com/product?p_p_id=productPagePortlet_WAR_adminwebserviceportlet. The page title is "Product - CA Communities".

The navigation menu includes: [+ MyCA Home](#), [+ Communities](#), [+ Support](#) (highlighted), and [+ Projects](#). Below the navigation, there are links for "Open Case", "View Case", "Download Product", "Download Solution", "Download Cart", "Product Pages", "Documentation", "Licensing", "Compatibilities", and "Advanced Search".

The main content area is titled "Product Page" and shows "Select a product:" with a dropdown menu set to "CA Service Desk Manager". A "< Back to Support" link is visible. Below this, there is a "Product Support Lifecycle Matrix" section with tabs for "News", "Bookshelves", "Technical Docs", "Recommended Reading", and "Product Status". The "News" tab is active, displaying a table of announcements:

DATE	TITLE
01/18/2013	CA Service Desk Manager r12.7 - Upcoming First Cumulative Patch
12/27/2012	Good news for SDM customers - CA Open Space for Service Management 2.0 is now Generally Available
12/19/2012	CA Service Desk Manager r12.6 Cumulative #3 Patch Published
11/29/2012	Service Management Roadmap and Strategy Webcast
10/10/2012	CA20121001-01: Security Notice for CA License
10/04/2012	Courtesy posting for SDM and CMDB customers - End of Life Announcement for CA Cohesion Application Configuration Manager.
09/21/2012	CA Catalyst Connector 3.2 for CA Service Desk Manager General Availability Announcement
08/07/2012	CA Service Desk Manager r12.6 Upcoming Third Cumulative Patch
07/18/2012	CA Service Desk Manager r12.5 Jumbo Patch #2 Published
05/21/2012	Latest Scenario TEC570119 - Implement Multi-Tenancy

At the bottom of the page, there are "Page Tools" for print, email, and share, and a footer with "Settings" and "Online Friends (2)".

Review & Decide

Where can I find the list of problems solved in a cumulative?



CA Service Desk Manager r12.6
Cumulative #3 Patch Published

Date: December 19, 2012

Please plan to install these mandatory published patches to be on the latest maintenance as the frequency of post cumulative test fix patches will require the published patches as a prerequisite.

This cumulative #3 patch includes a number of corrections denoted by Service Desk component, Service Desk Server (USRD). You can download the cumulative #3 patches here:
<https://support.ca.com/liri/portal/anonymous/phpsupcontent?contentID={0DE9AD34-9587-4D51-ABE3-387FEF935208}>.

For a smooth transition to our published patches, please review our [Cumulative Incidents](#).

A list of the problems resolved by the cumulative #3 patch can be found in the following table. For more information on a particular problem, search the knowledge base on support.ca.com or click on the hyperlinks below. Please note that all corrections included in cumulative patch #1 and cumulative patch #2 are also rolled up into cumulative #3. The list of corrections included in cumulative #1 can be found here: <https://support.ca.com/liri/portal/anonymous/phpsupcontent?contentID={E54C662E-4933-46F9-98D4-A71BC18D05CF}>.
The list of corrections included in cumulative #2 can be found here:
<https://support.ca.com/liri/portal/anonymous/phpsupcontent?contentID={027CEACB-25E8-4404-A4A8-51DB924DE3D4}>.

Note: This cumulative is delivered via three separate patches, one that contains binary-only deliverables, one that contains JavaScript and HTML files, and another language specific patch that contains localized files. They cannot be applied independently of each other.

Component	Problem #	Description
USRD	415	LDAP MERGE HANG
USRD	654	PDM_EDIT.PL THROWS AN ERROR WHILE CONFIGURING DOMSRVRS
USRD	681	BOPLOGIN HANGS
USRD	715	UNABLE TO LOGOUT WHEN REPORT SERVER CONFIGURED
USRD	811	BOXI INTEGRATION FAILS WHEN PDMWEB.EXE IS RENAMED

Settings Online Friends (2)

Download Link

Cumulative Incidents

Review & Decide

Cumulative patch incidents



Admin - CA Communities x

https://communities.ca.com/web/guest/admin?contentID={996DEF90-02F8-4D66-8942-F5B6A53C8C3F}&enableBackLink=true¤tURL=

Welcome, Karen Log out ca.com About MyCA Contact UK & Ireland - English

Search

+ MyCA Home + Communities + Support + Projects

[<<Back](#)

Reported Incidents With Third Cumulative Patches of CA Service Desk r12.6

Last Updated: January 29, 2013

Fix published on December 13, 2012

AIX CA Service Desk 12.6

[RO53181](#) AIX-USRD-C R12.6 CUMULATIVE #3 BINARY PATCH
[RO53182](#) AIX-USRD-C R12.6 CUMULATIVE #3 FORMS PATCH
[RO53183](#) AIX-USRD-C R12.6 CUMULATIVE #3 ENGLISH PATCH

LINUX CA Service Desk 12.6

[RO53174](#) LNX-USRD-C R12.6 CUMULATIVE #3 BINARY PATCH
[RO53175](#) LNX-USRD-C R12.6 CUMULATIVE #3 FORMS PATCH
[RO53180](#) LNX-USRD-C R12.6 CUMULATIVE #3 LANGUAGES PATCH

SUN CA Service Desk 12.6

[RO53238](#) SUN-USRD-C R12.6 CUMULATIVE #3 BINARY PATCH
[RO53239](#) SUN-USRD-C R12.6 CUMULATIVE #3 FORMS PATCH
[RO53244](#) SUN-USRD-C R12.6 CUMULATIVE #3 LANGUAGES PATCH

WINDOWS CA Service Desk 12.6

[RO53124](#) WIN-USRD-C R12.6 CUMULATIVE #3 BINARY PATCH
[RO53125](#) WIN-USRD-C R12.6 CUMULATIVE #3 FORMS PATCH
[RO53134](#) WIN-USRD-C R12.6 CUMULATIVE #3 LANGUAGES PATCH

The below list of incident problems described here is a compilation of side effects reported when installing Cumulative #3. It does not contain all generic post Cumulative #3 fixes.

Incident 1: Product Defect - IMPROPER VALUE IN ADDITIONAL SEARCH ARGUMENTS FIELD

After performing a search with 'Additional Search Arguments' added in the search filter and the Active field set to '<empty>', the search filter will no longer display the exact additional arguments specified for the initial search.

Steps to Reproduce:

Settings Online Friends (0)

Review & Decide

Cumulative patch incidents



Operational

Language Patch

Admin - CA Communities x

← → ↻ 🏠 <https://communities.ca.com/web/guest/admin?contentID={996DEF90-02F8-4D66-8942-F5B6A53C8C3F}&enableBackLink=true¤tURL=> ☆ ☰

Incident 2: Product Defect - WRONG ADDITIONAL WHERE CLAUSE IN LIST PAGES

After installing the third set of Cumulative Patches for Service Desk Manager r12.6, specifically the resolution to problem number USRD 1931, under certain circumstances it is possible that the Additional Where Clause to get malformed. This is found to happen if the Additional Where Clause contains an 'OR' logical operation.

Steps to Reproduce:

1. Using Web Screen Painter customize list_in.html by removing the 'Assignment Status' field from the search filter. Save and Publish the change.
2. Login to Service desk using an analyst user and go to 'Incidents->'Assigned' section and click on 'Medium Priority' scoreboard node.
3. Clicking on the 'Show Filter' button it can be noticed that the Additional Where Clause is similar to:

```
"( priority IN ( 3,4 ) )( assignee IS NOT NULL OR group IS NOT NULL ) AND type = 'I'"
```

Clicking on the 'Search' button a 'Bad Where Clause' error will be received.

Correction:

USRD 2360 - WRONG ADDITIONAL WHERE CLAUSE IN LIST PAGES

NOTE: Contact CA Support for any Post Cumulative #3 Test Fix patches for the above corrections if needed for your business processes.

Incident 3: Patch Defect - UNABLE TO INSTALL THE 12.6 CUMULATIVE #3 PATCH RO53128

Unable to install the 12.6 cumulative #3 patch [RO53128](#) for the Spanish language due to the following error reported by the ApplyPTF utility:

```
"Could not status source file 'C:\USERS\DMINI~1\APPDATA\LOCAL\TEMP\3\SRO53128\scripts/msg_cat.js'"
```

Informational Solution:

1. Locate the directory containing applyptf.exe and confirm that it also contains the file, cazipxp.exe.
2. Create a temporary directory, such as one named "unzip_RO53128" and copy RO53128.caz into that directory.
3. From a Command Prompt set that directory as your current directory and run the following command:

```
cazipxp -u RO53128.caz
```
4. Edit the RO53128.JCL file from this directory and modify the one occurrence of ' / ' to ' \ ' in only the following statement:

```
FILE:bopcfg\www\wwwroot\scripts/msg_cat.js::
```
5. Run the following command:

```
APPLYPTF
```

Select the first option:
Apply PTF to local or remote nodes
Click Next
Click Browse and select the RO53128.JCL file that you just edited
Leave all other options intact unless the node name is incorrect
Click Next to install the patch.

Settings Online Friends (0)

Review & Decide

Example: List of "R0" patches



CA Service Desk Manager 12.6
Solutions & Patches

- [Windows](#)
- [Informational Solutions Index](#)
- [Unix](#)
- [Linux](#)

Name	Type	Size	Date Released	Description	Prerequisites
Windows					
R053910	CAZ	843 Bytes	01/09/13	WIN-UPDATING LICENSE MODEL	None
R053520	CAZ	920 Bytes	12/20/12	This patch was superseded by R053910	None
R053134	CAZ	27.9 MB	12/13/12	WIN-USRD-C R12.6 CUMULATIVE #3 LANGUAGES PATCH	COREQS: R053124 R053125
R053125	CAZ	4.3 MB	12/13/12	WIN-USRD-C R12.6 CUMULATIVE #3 FORMS PATCH	COREQS: R053124 R053134
R053124	CAZ	149.0 MB	12/13/12	WIN-USRD-C R12.6 CUMULATIVE #3 BINARY PATCH	COREQS: R053125 R053134
R051630	CAZ	11.9 MB	10/26/12	WIN-CA MDB INSTALL ON DATABASE SERVER WITH SQL SERV	None
R045309	CAZ	247.7 MB	05/09/12	WIN-DELIVER EEM 8.4 SP4 CR09 FOR USRD R12.6	None
R043545	CAZ	373.5 MB	03/27/12	WIN-SERVICE DESK MANAGER CATALYST CONNECTOR INSTAL	None

Settings Online Friends (2)

Cum #3

Review & Decide

Solutions & Patches – Unix section, Hyper patch



RO41385	CAZ	5.2 MB	02/07/12	WIN-USRD-C R12.6 CUM2 FIX JAPANESE	None
RO41384	CAZ	5.1 MB	02/07/12	WIN-USRD-C R12.6 CUM2 FIX FRENCH	None
RO41383	CAZ	5.1 MB	02/07/12	WIN-USRD-C R12.6 CUM2 FIX SPANISH	None
RO41382	CAZ	19.7 MB	02/07/12	WIN-USRD-C R12.6 CUM2 FIX ENGLISH	None
RO41381	CAZ	5.1 MB	02/07/12	WIN-USRD-C R12.6 CUM2 FIX GERMAN	None
RO41377	CAZ	99.8 MB	02/07/12	WIN-USRD-C R12.6 CUM2 FIX BINARY	None
RO33097	CAZ	89.5 MB	07/26/11	WIN-USRD-C R12.6 CUMULATIVE #1 FIX	None
RO30931	CAZ	2.4 MB	05/26/11	WIN-SQL SELECT QUERIES MAY CREATE A DEADLOCK THIS IS A HYPER FIX.	None
UNIX					
AIX					
RO54933	CAZ tar.Z	483 KB 603 KB	02/11/13	AIX-ITPAM 4.0 SP1 AND 4.1 SUPPORT FOR SDM R12.6	None
RO53913	CAZ tar.Z	913 Bytes 3 KB	01/09/13	AIX-UPDATING LICENSE MODEL	None
RO53523	CAZ tar.Z	989 Bytes 2 KB	12/20/12	This patch was superseded by RO53913	None

Review & Decide

Accessing the Readme file



The screenshot shows a web browser window with the following details:

- Address bar: https://communities.ca.com/web/guest/support-search/-/support_search/solutionresults/RO53124
- Page Title: Support Search - CA Comm...
- Navigation: MyCA Home, Communities, Support, Projects
- Search Bar: Search
- Support Search Section: << Back
- Table of Results:

Published Solution	Component & Release	Type	Hypers	Modified Date	OS	Add to
WIN-USRD-C R12.6 CUMULATIVE #3 BINARY PATCH Fix #RO53124	UNICENTER SERVICE DESK RXX, 12.6	▲	No	12/13/2012	WINDOWS	<input type="checkbox"/>

Page 1 of 1 | Displaying topics 1 - 1 of 1 | Records per page 10

check all

Settings Online Friends (2)

Review & Decide

Reviewing the Readme



The screenshot shows a web browser window with the URL https://communities.ca.com/support-search?p_auth=KEP7TCpS&p_p_id=support_search_WAR_cvnsupportportlet&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&p_p_col_id=colun. The page is titled "Support Search - CA Com..." and features the CA Technologies logo and navigation links for MyCA Home, Communities, Support, and Projects. The main content area displays "Solutions Details for: R053124" with a "Print This Page" link. Below this, there are expandable sections for "Solution Details", "Problem Description", "Solution Downloads", "Dependencies", and "Related Problems". The "Solution Details" section is expanded, showing the following information:

Operating System:	WINDOWS	Solution Number:	62
Confirmed Date:	12/13/2012 13:52:00	Updated Date:	12/13/2012
Component:	UNICENTER SERVICE DESK RXX	Release:	12.6
Solution ID:	R053124	Hyper:	false
Distribution Code:	AVAILABLE		

At the bottom of the page, there are "Page Tools" for print, email, and share, along with a footer containing links for about us, news, events, careers, rss feeds, legal, privacy, sitemap, and copyright information for CA 2012. The browser's status bar shows "Settings" and "Online Friends (2)".

Review & Decide

Important notes in the Readme - example



The following COREQS must be applied together with this fix: RO53125 RO53134

- The COREQS list above lists co-requisite patches for the same platform. If CA Service Desk is running on a cross-platform environment, then please find the corresponding co-requisite patch for your specific platform on the same web support page

This cumulative patch must be applied on the Primary server and all secondary servers

This cumulative patch requires shutting down CA Service Desk services

You must use an account with Administrator privileges to install this cumulative patch

POST INSTALLATION STEPS

- `$NX_ROOT\doc\Post_Installation_Steps_and_backout_procedure_for_Cumulatives_in_Windows.html`

UPDATED ROUTINES:

UPDATED ROUTINES:

```
ahd.dll      34304 MON OCT 15 06:24:37 2012
animator_nxd.exe  1110016 MON OCT 15 06:20:22 2012
api.maj      6138 FRI MAR 02 03:38:41 2012
ApplicationAPI.jar  359929 SUN OCT 14 21:42:53 2012
ApplicationUI.jar  935264 SUN OCT 14 21:42:53 2012
arcpur_srvr.exe  1171456 MON OCT 15 06:19:55 2012
Area_Defaults.spl  4449 MON OCT 15 01:12:09 2012
ARTToolsManager.jar  133371 SUN OCT 14 21:42:53 2012
```

Review & Decide

Extracting the Post Installation Steps document from .caz (Windows)

We recommend that you review the Post Installation steps at this stage.

To check a patch for the inclusion of the post installation steps document, on Windows, run:

```
cazipxp -L <RO_patch_number>.CAZ | find "Post_Installation"
```

Note: Put the real name of the patch in the placeholder, <RO_patch_number> .

To extract only the post installation steps document from the patch, on Windows, run:

```
- czipxp -u <file_name> <RO_patch_number>.CAZ
```

Note: <file_name> is the standard name of the post installation file, which is either:
Post_Installation_Steps_and_backout_procedure_for_Cumulatives_in_Windows.html
or:

Post_Installation_Steps_and_backout_procedure_for_Cumulatives_in_Windows.txt

For example:

```
cazipxp -u  
Post_Installation_Steps_and_backout_procedure_for_Cumulatives_in_Windows.html  
RO53124.CAZ
```

Review & Decide

Important Notes in the Post installation Steps Document - example

Required Steps

Example: SDM 12.7 Cumulative #1 patch RO55567

File: Post_Installation_Steps__backout_procedure_for_Cumulatives_in_Windows.txt

Some of the Content:

- **IMPORTANT NOTE:**

=====

Steps 1 through 4 are required steps. You need follow them to complete the installation.

1. Follow the steps below to install MDB patch:

a) You must use an account with administrator privileges to install this MDB test fix.

b) \$NX_ROOT\patches\cum1\MSSQL_MDB.CAZ or \$NX_ROOT\patches\cum1\ORACLE_MDB.CAZ, depending on your database type, should be unzipped to the directory of you choice, using CAZIPXP.EXE CA tool.

If your database resides on a different server, please copy the appropriate .CAZ file to the remote server and continue with the installation on that server.

f) Run setupmdb.bat to apply the patch:

SQL Server example:

```
setupmdb -DBVENDOR=mssql -JRE_DIR=C:\PROGRA~1\CA\SC\JRE\1.6.0_30 -DBUSER=sa -DBPASSWORD=sa -DBDRIVER=Service_Desk -WORKSPACE=Service_Desk
```

Note #3: There is no uninstall mechanism for this patch. To restore DB to Pre-patch status use the relevant database restore utility. Should the patch install fail the transactions within the current patch sql script will be rolled back. Patches containing multiple sql scripts will commit those scripts that apply successfully. Where a sql script fails within a multi-script patch that script will be rolled back and patch application terminated.

Scripts already committed will not be rolled back.

- 2. Run the following command to reconfigure Service Desk: pdm_configure Note #1: Do not select 'Load Default Data'. Note #2: This step is required on both the primary and secondary Service Desk server.

Optional Steps

- **IMPORTANT NOTE:**

=====

Steps listed as optional below are not required. You should follow them only if you are encountering that specific problem or want to take advantage of that specific solution.

Best Practices for Patching Service Desk Manager

Polling question

What is contained in the post installation steps document of a cumulative patch?

1

instructions for completing the application of the patch

2

mostly unimportant and unnecessary steps

3

optional steps for applying some patches or making solutions effective

4

both 1 and 3

Review & Decide

Considerations for customized Service Desk environment

All the customized Service Desk pages are located in `$NX_ROOT\site\mods` corresponding directories. ApplyPTF never copies files into this directory.

If you have a custom file which also appears in the list of files or updated routines in the readme , you should analyze the differences and determine what customizations need to be kept. Later, you will merge these customizations.



Best Practices Summary

Plan, Test, & Verify



Get Ready!

- Know patch basics & purpose of patching
- Know your environment & configuration
- Know your internal requirements, policies & procedures for patching in test & production

Review & Decide

- Review list of available patches
- Review readme file
- Review post installation notes
- Assess impact on customizations

Plan, Test, & Verify

- Prepare one or more test environments
- Plan & schedule selected patches in test and production environments
- Verify patches after applying
- Customized environments: compare results in customized environment with results in a patched out-of-the-box test environment

Apply to Production

- Apply patches to production

Ongoing

- Subscribe to hyper patch notifications
- Regularly review announcements about patches and plan to apply ASAP

Plan, Test, Verify

Preparation for applying a patch

- **Know your Production environment**
 - Machines, operating systems, DBMS, Service Desk customizations
- **Create Patching Test Environments**
 - **Baseline #1:** Out-of-the-box plus official patches with Test data.
 - **Baseline #2:** Consists of baseline #1 plus your customized schema, forms, options installed and configured plus Test data.
 - **Baseline #3:** This is a Mirror of your production system
This could be your User Acceptance Test, UAT, so it includes real data.
- **Backups**
 - NX_ROOT if installing a cumulative patch
 - NX.env, especially if pdm_configure must be run
 - MDB database
 - Note: The patch tool automatically backs up *only the files being replaced by a patch*

Plan, Test, & Verify

Plan: Advantages of using patching test environments

- Baseline #3 is a mirror of your production system, with new patch level applied
- This baseline enables you to:
 - Test that a patch actually resolve problems you've encountered that you expect it to resolve.
 - Verify that there are no regressions.
 - Find any conflicts of the patch with your environment.
 - Merge the custom files with the files delivered in a patch.
 - Reduce the production system down time.
 - Reduce the stress of applying patches.
- Baseline #1 and #2 can be helpful in isolating the root cause of a problem

Best Practices for Patching Service Desk Manager

Polling question

What is a baseline environment?

- 1** A mirror of the production system
- 2** A test environment with GA Service Desk plus cumulative patches
- 3** An environment that can be used to test the effect of patches on customizations
- 4** All of the above

Plan, Test, & Verify

Patching tools

- The tool for applying patches is called:

applyptf

- For Windows environments, to install the latest version of applyptf, you need a second tool called cazipxp.exe
- The next slides will show you how to get both applyptf and cazipxp

Plan, Test, & Verify

Patching tools

- The applyptf package contains a Windows executable called:

cazipxp.exe

There will be times when this tool must be used. Instructions on when to use it are in the readme of any patches that require it.

- czipxp.exe is a packaging and an un-packaging tool; it is not a tool to install or apply patches.
- Windows-only: If you do not already have applyptf installed, you need to get czipxp installed first.
- After logging into support.ca.com, click on “Download Center”, located in the panel named “Support” on the left side.
- If you are operating inside MyCA, click on the “+MyCA Home” tab, scroll down, select “Download Center” under the “Support Resources” section.

Plan, Test, & Verify Patching tools



The screenshot shows a web browser window displaying the CA Support Online website. The address bar shows the URL: <https://support.ca.com/irj/portal?NavigationTarget=navurl://a24c838b29c4ff32a24b516e9958ece0>. The page title is "CA Support Online". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The address bar shows "CA Support Online" and "Download Center". The page content includes a search bar for "Fix/Patch Number", a "Freeware Utilities / Toolbox" section with a list of tools, and a "Virus Signatures" section. The footer contains links for "about us", "news", "events", "careers", "rss feeds", "legal", "privacy policy", "sitemap", and "Copyright © 2012 CA. All rights reserved".

CA Support Online

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Support By Product

Download Center

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Compatibilities

CA Programs

Subscriptions

Contact and Resources

Go Live with CA Technologies Project Management

Search by Fix/Patch Number :

--Enter Fix Number-- Go

Freeware Utilities / Toolbox

The utilities below are tools to assist in using CA software. Some tools listed may not apply to all products.

Latest Applyptf
Allows you to apply and /or list PTF's
→ Learn more Download

CA Common Diagnostic Facility (CA CDF)
Simplifies the data capture of diagnostic information for select CA products.
→ Learn more Download

CA Concatenate
Allows you to concatenate binary(.bin) or text(.txt) files thus reducing the number of files that need to be uploaded to the mainframe.
→ Learn more Download

CAZIPXP
Allows you to compress multiple files into single package.
→ Learn more Download

CAZIP
Allows you to compress single file.
Download

Remote Support Service
Allows you to share your computer with a technical support engineer for easier problem resolution.
Note: You must be actively working with a technician via phone to use this service.
→ Start Remote Support Service with GoToAssist
→ Start Remote Support Service with SupportBridge

Virus Signatures

Download the latest virus signature files.
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User Administration

CA Programs

CA Programs

Compatibilities

Additional Site Access

Subscriptions

Contact and Resources

Subscriptions

How to use the CA ZIPXP utility to unzip your .CAZ file

Last Updated: September 25, 2009

1. Download the [CAZIPXP.EXE](#) utility file.
Save it in a directory such as C:\ca_appsw or a temp directory.
2. Download the .CAZ and save it to the same directory.
If you get garbage text on the screen when you click the link, right-click on the link and select "Save Link As..." or "Save Target As..." from the context menu.
3. The .CAZ file and CAZIPXP.EXE files should now be in the same directory.
4. Open a command prompt (Sometimes called a command line or DOS prompt).
Change the directory to the one where the two files reside.
5. Type:
CAZIPXP -u (the_file_name).CAZ

Example: If the file name is LO34567.CAZ, then type:
CAZIPXP -u LO34567.CAZ
6. At this point the contents of the file will be unzipped.
The files should match the list (usually titled: UPDATED ROUTINES:) in the web page which had the link to the .CAZ file.

Notes:

- The CAZIPXP utility can be used on Windows 2003, Windows XP and DOS platforms.
- Some .CAZ files, in the past contained other compressed formats within the .CAZ file (TAR or ZIP). If this is the case with your .CAZ file, use the third party utility for that format.
- Please ensure that you type the patch number accurately, such that the number zero "0" and the letter "O" are properly differentiated where applicable. If you accidentally enter a zero for the letter O, or vice versa, the CA ZIPXP utility will not recognize the patch number and fail to execute.

Plan, Test, & Verify

What does applyptf do?



technologies + solutions + products + customer success & communities + services, support & education + partn

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Welcome to ApplyPTF

Latest ApplyPTF #: RO47072
Last Updated: June 12, 2012

Download ApplyPTF

Latest ApplyPTF [Readme and Download](#)

General Information

The ApplyPTF utility allows you to apply and/or list PTFs on your system or master install image. You may either work interactively with the ApplyPTF Wizard on Microsoft Windows, or invoke it from the command line with arguments that specify the actions you wish it to perform. Working interactively with the ApplyPTF Wizard is the easiest method of applying fixes. Whenever any information has been omitted, or decisions from you are required, the ApplyPTF Wizard will prompt you as necessary. ApplyPTF can:

- List the PTFs applied to the local or a remote node
- List the PTFs applied to a master install image
- Apply a PTF to the local or a remote node
- Apply a PTF to a master install image
- Batch apply any set of PTFs to nodes and/or master install images (Microsoft Windows)
- Batch apply any set of PTFs to local Unix machines
- Apply a PTF to a master image on Unix

Notes before continuing with this document:

- Throughout this document references to CA NSM are used in the examples to explain the various ApplyPTF features or functionality. This in no way shape or form implies this utility is specific to CA NSM.
- The document makes mention of a master image. A master image is a disk copy of the original product installation image. ApplyPTF supports applying fixes to a products master installation image. Some products do not support a master installation image. For those that do not, any sections or references regarding master images can be ignored.
- This document refers to the location of the latest ApplyPTF. Please note, any references to specific product requirements, CA NSM, CA AutoSys®, etc. in the fix documentation will apply to that mentioned product only and can be ignored for all other products.
- When applying PTFs to your current product installations, you should always use ApplyPTF.

ApplyPTF eliminates common PTF application problems:

- Verifies prerequisite PTFs have already been installed

ApplyPTF scans through the node's "history file" a log that lists what PTFs have been applied (and when) by this application. If no such log exists it offers to create one

Plan, Test, & Verify

What is the patch tool doing?

Verifies prerequisite PTFs have already been installed.

- Scans through the "history file", a log that lists what patches have been applied (and when) by this application.

Compares the file dates in the patch with those already on the target machine.

- Compares the date stamp of all "replacement" files in the patch with those already on the system. It will not replace a file if it detects that the new file is older than its installed from the patch.

Backs up the original files in case you need to remove the patch.

- Creates a directory tree "REPLACED\PATCHNAME.OLD" on Microsoft Windows, and "REPLACED\PTNFAME" on Unix, in the target component/image directory.

Maintains a history file for each patch apply on the system.

- Updates the history file each time it applies a patch to it. It records the date, time, patch name, release, component name, file installed and location.

Plan, Test, & Verify

Anatomy of a patch

Patches consist of files that have been zipped into packages

- For Windows: .caz
- For Unix: .tar.z

Patches usually include a .jcl file.

applyptf :

- Reads a .jcl file
- Can un-package a .caz file. So, for Windows, it is not necessary to unpack the patch.
- Cannot un-package a .tar.z or tar file. So, for Unix, you must un-compress and un-package the tar.z file to expose the .jcl file

If you have customizations, you may want to unpackage the patch to verify the deliverables.

Plan, Test, & Verify

Anatomy of a patch – the .jcl file

- **Any prerequisites and corequisite patches for a particular patch are defined in the .jcl file of the patch. This information is read and used by applyptf.**
- **Do not modify the .jcl file or any file that is packaged in the patch, unless, you are instructed to do so in the instructions or as advised by CA Support.**

Exception example:

Per explicit instructions in the informational solution for cumulative incident #3 for 12.6 Cumulative patch #3, you need to unpack the Windows .caz file and modify the .jcl file and then use the modified .jcl file with applyptf.

- **If applyptf does not report that any pre-requisite or co-requisite patches also need to be applied, then you are done applying the patch.**

Exception example:

Per explicit instructions in the readme, you need to apply the master language patch for r12.6 Cumulative #3 and to subsequently apply one of the language-specific patches contained within it when applying 12.6 Cumulative #3.

Best Practices for Patching Service Desk Manager

Polling question

What is the name of the tool that is used to install Service Desk patches?

1 cazipxp.exe

2 tar

3 copy

4 applyptf

Plan, Test & Verify

Best practices for a customized environment

- **Customized code**
 - customized forms, javascript, etc.
 - always resides under `$NX_ROOT\site\mods`
- **Web Screen Painter (WSP):**
 - Customize forms
 - Customize schema
 - WSP publishes the changes only to directories under `$NX_ROOT\site\mods`



Plan, Test, & Verify

Rules that must be followed for successful patching

Shutdown all Service Desk services before applying patches - Primary and all Secondary

- The set of patches that are in-place for the Service Desk primary server must match the set of patches that are in-place for each Service desk secondary server

You may want to apply patches to secondary servers before the primary server

- Important to ensure primary service is down when applying to secondary; ensure secondary service is down when applying to primary
- Applyptf may automatically start the Service Desk service; if you haven't finished applying the patches to both pri and sec, shutdown the service after applyptf completes

Review the patch installation readme in its entirety advance

Follow the instructions as set out in the readme

For some solutions post-installation steps are necessary

- example: run pdm_configure
- example: changes to data in the MDB



Plan, Test, & Verify

Verify: The patch history file – after the patches have been applied

\$NX_ROOT directory

- Windows: C:\Program Files\CA\Service Desk Manager
from windows command prompt, issue: nxcd
 - Unix: \opt\CA\ServiceDesk
-
- **Includes or shows:**
 - Patches installed
 - Any backed out
 - Details on the exact file; installed, where, and named or renamed
 - Required for review by CA Support
 - Exists on the Service Desk Primary server and each Secondary server
 - If not found under \$NX_ROOT, then the server is unpatched

Plan, Test, & Verify

Verify: A summary of the patch history file

- On Windows, from a command prompt window, run:

```
nxcd
```

```
find "PTF" *.his
```

- On Unix, from a command prompt window, run:

```
cd /opt/CA/ServiceDesk
```

```
grep 'PTF' *.his
```



You can pipe the output to a file by adding: `>hisSummary.txt`

Why might you want to do this?

- For an overview of which patches are installed or have been backed out

What is missing from the summary?

- The details about the files that were installed and where they were installed

Plan, Test, & Verify

Verify: A summary of the patch history file (continued)

----- SDMPRIMARY.HIS

[Sun Jan 29 21:25:51 2012] - PTF Wizard created this history file.
[Sun Jan 29 21:25:53 2012] - PTF Wizard installed RO30931 (USRD)
[Sun Jan 29 21:39:12 2012] - PTF Wizard installed RO33097 (USRD)
[Wed May 23 21:53:25 2012] - PTF Wizard installed RO41377 (USRD)
[Wed May 23 21:57:44 2012] - PTF Wizard installed RO41382 (USRD)
[Mon Aug 13 00:02:37 2012] - PTF Wizard installed T5W2043 (USRD)
[Mon Aug 13 00:21:32 2012] - PTF Wizard backed out T5W2043 (USRD)
[Wed Jan 09 06:54:27 2013] - PTF Wizard installed RO53124 (USRD)
[Wed Jan 09 06:58:51 2013] - PTF Wizard installed RO53125 (USRD)
[Wed Jan 09 06:59:40 2013] - PTF Wizard installed RO53134 (USRD)
[Wed Jan 09 07:33:45 2013] - PTF Wizard installed RO53126 (USRD)

Although listed in the patch history file, you won't find the language-specific patches listed on the web page titled, "CA Service Desk Manager 12.6 Solutions & Patches" because they are contained inside of the overall language patch, RO53134.

- RO53126: WIN-USRD-C R12.6 CUMULATIVE #3 ENGLISH PATCH
- RO53127: WIN-USRD-C R12.6 CUMULATIVE #3 GERMAN PATCH
- RO53128: WIN-USRD-C R12.6 CUMULATIVE #3 SPANISH PATCH
- etc

Best Practices for Patching Service Desk Manager

Demonstration – Applying 12.6 Cumulative #3

Environment:

- Service Desk Manager r12.6
- Primary Service Desk server only
- out-of-the-box (no patches)
- no customizations

Preparation

Using applyptf to apply Cum#3

Reviewing and running post-installation steps

Verifying



Demonstration

Best Practices Summary

Ongoing



Get Ready!

- Know patch basics & purpose of patching
- Know your environment & configuration
- Know your internal requirements, policies & procedures for patching in test & production

Review & Decide

- Review list of available patches
- Review readme file
- Review post installation notes
- Assess impact on customizations

Plan, Test, & Verify

- Prepare one or more test environments
- Plan & schedule selected patches in test and production environments
- Verify patches after applying
- Customized environments: compare results in customized environment with results in a patched out-of-the-box test environment

Apply to Production

- Apply patches to production

Ongoing

- Subscribe to hyper patch notifications
- Regularly review announcements about upcoming patches and plan to apply them ASAP after published

Ongoing

Existing Knowledge Documents related to patching

- [TEC584867](#) - After applying a cumulative patch, pdm_configure fails during the task named 'Create localized resources'
- [TEC482325](#) - How can I check the list of patches installed on my machine without navigating to history file?
- [TEC505914](#) - When applying an MDB Patch the person applying the patch must be logged in as the owner of the database, not simply as any user having permission to make changes to objects (tables, views etc) in the database.
- [TEC509851](#) - When applying a Service Desk patch or Cumulative using ApplyPTF the follow error occurs: "GetPathFromProduct() USRD is not installed on "
- [TEC537007](#) - How to extract patch names and install dates from the .HIS patch history file.
- [TEC511929](#) - How do I apply Service Desk patches using Applyptf?
- [TEC548493](#) - How are the html files and xml files in the 'tagged' folder used?
- [TEC467070](#) - How to apply Service Desk patch on Unix
- [TEC465258](#) - Reviewing HTML and JS customizations after installing a "Webengine" or Service Desk Web Server Patch
- Note: click on "Show Technical Document Details" for SDM version.

Ongoing

CA Communities postings related to patching

How do I know my Service Desk Version?

Link:

https://communities.ca.com/web/ca-service-management-global-user-community/message-board/-/message_boards/view_message/100329731

Ensuring SDM Environments are Synchronized

Link:

https://communities.ca.com/web/ca-service-management-global-user-community/message-board/-/message_boards/view_message/81839040

Identify which HTML pages have been modified by SDM 12.5 Cum#1 and Jumbo #1

Link:

https://communities.ca.com/web/ca-service-management-global-user-community/message-board/-/message_boards/view_message/23676249?#_19_message_36774524

Best Practices for Patching Service Desk Manager

Polling question

How soon after the announcement of the availability of a cumulative patch should I apply it?

- | | |
|----------|--|
| 1 | It doesn't matter |
| 2 | After users encounter a problem that requires a code fix |
| 3 | As soon as possible after successful verification in an appropriate test environment |
| 4 | Only when advised to do so by CA Support |

Questions & Discussion

- > Review questions in Q/A folder
- > Press *1 to ask a question

Best Practices for Patching Service Desk Manager

Presenters



Karen Matoke, Principal Support Engineer

- Located in London, England, United Kingdom
- 3+ years experience with CA Service Desk Manager
- Previous experience includes roles in Sustaining Engineering and in Product Development for database and for network management applications



Richard Ritter, Sr. Support Engineer

- Located in New York
- 10 years experience with CA Service Desk Manager

Survey

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