Mercury™ IT Governance Center

Using the Dashboard

Version 5.5.0

MERCURY INTERACTIVE

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Chapter 1 Introduction

Mercury IT Governance Center provides two areas where the user can interact with the product: the standard interface and the Mercury IT Governance Workbench. The standard interface uses HTML and Javascript to provide users with access to the key areas of functionality. The standard interface enables users to perform common tasks without requiring a Power License. The Workbench is a Java applet designed to help application administrators, product configuration experts, and Power Users to perform advanced configuring and processing tasks.

The standard interface includes one or many Mercury IT Governance Dashboard pages. Each Dashboard page contains one or many Portlets. Portlets are configurable, role-based visual displays providing relevant summary information and highlight exception conditions. These Portlets automatically capture and display real-time data while work is in progress. Since actions, such as Task completion and code deployment, are performed from within the system, this information is captured immediately. Users no longer need to rely on email updates, phone calls, or status meetings to gain insight into a Project’s progress or an operation’s efficiencies.

About This Document

This guide discusses the concepts and components of the Dashboard. Additionally, this guide describes how to navigate and use the Dashboard. Each chapter covers a specific topic on navigation or usage:

Key Concepts	Describes the general concepts of the Mercury ITG Dashboard. This includes Dashboard pages, Portlets and Templates.

Using the Dashboard	Provides step-by-step instructions on how to use the Dashboard. This includes logging on and off and adding and editing Dashboard pages.
System Portlets	Lists all of the available system Portlets.
Field Formats	Lists all of the field formats. This includes information on using auto-complete lists and table fields.

Intended Audience

The intended audience for this document includes:

- Users of the Dashboard
- Managers who create and manage the Dashboard
- Business users responsible for reporting on the Dashboard

Document Conventions

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

Table 1-1. Document conventions

Convention	Description	Example
Button, menu, tabs	Names of interface components which can be clicked (such as buttons, menus, and tabs) are shown in bold.	**Apply** button
Fields, Windows, Pages	Names of windows, fields, and pages are shown as displayed.	New Request window

`Code`	Code input and output are shown as displayed.	`CauchoConfigFile`
		`C:/`*ITG_Home*`/conf/`
		`resin.conf`

Link	Linked URLs, filenames, and cross references are shown as blue italicized text.	*www.mercury.com*
Variable	Variables are shown as italicized text.	*ITG_Home*/bin directory

Table 1-1. Document conventions [continued]

Convention	Description	Example
Note	Used to identify note boxes which contain additional information.	Note
Caution	Used to identify caution boxes which contain important information. Follow the instructions in all caution boxes, failure to do so may result in loss of data.	Caution
Example	Used to identify example boxes which contain examples of related procedure.	Example

Additional Resources

Mercury Interactive provides the following additional resources to help you successfully use Mercury ITG Center:

- *Related Documentation*
- *Customer Support*
- *Education Services*

Related Documentation

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

Processing Requests (Demand Management)	This document explains how to process Requests using Mercury Demand Management.
Processing Requests (Demand Management)	This document explains how to process Packages using Mercury Change Management.

Managing Your Projects (Project Management)	This document explains how to work with Projects using Mercury Project Management.
Configuring the Dashboard	This document provides instructions for configuring custom Portlets, maintaining standard and custom Portlets, and setting a Default Dashboard for all users.
Managing Your Resources (Resource Management)	This document provides instructions for managing Resources. This includes modeling Organizations, setting up Resource Categories and Calendars, creating Staffing Profiles and Resource Pools, and visualizing Resource load and capacity across the system.

Customer Support

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

Education Services

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

Chapter 2
Key Concepts

This chapter details key concepts and definitions related to the Mercury IT Governance interface. These concepts and definitions will help the user to utilize the full feature set of the Mercury IT Governance interface.

This chapter discusses the following topics:

- *The Mercury IT Governance Interface*
- *Menu Bar*
- *Menus, Sub-Menus and Menu Items*
- *Navigation Path*
- *Dashboard*
- *Dashboard Pages*
- *Portlets*
- *Exporting Data to Excel*
- *Personalization*

The Mercury IT Governance Interface

The Mercury IT Governance interface, also called the standard interface, is an HTML interface designed to view Mercury IT Governance data. The main components of the standard interface are the:

- Menu bar.
  A hierarchical organization of task-oriented pages. The Menu bar consists of Menus, Sub-Menus and Menu Items.

- Navigation Path.
  A list of the pages opened during a Dashboard session.
- Mercury IT Governance Dashboard.
  A the area where information is displayed. The Dashboard consists of Dashboard pages. Each Dashboard page can be configured to present specific information.

Figure 2-1 illustrates the IT Governance interface.

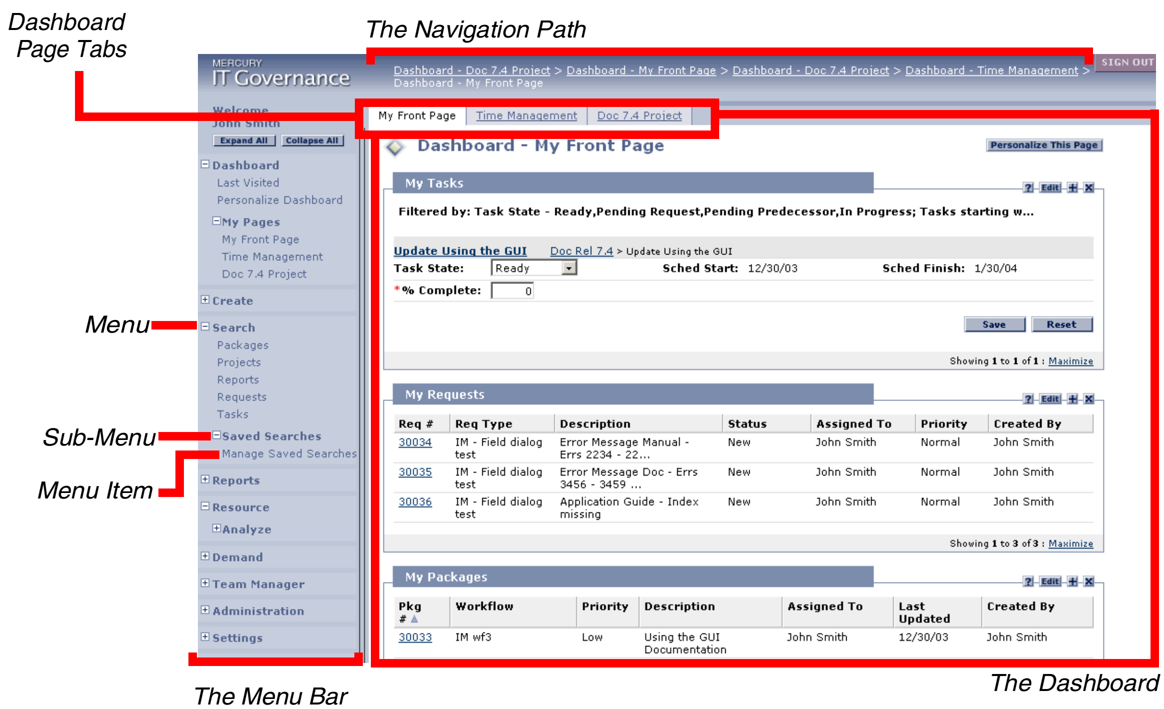


Figure 2-1 IT Governance Interface

Menu Bar

The menu bar presents a hierarchical organization of menus, sub-menus and menu items (see *Figure 2-2*). Menus and sub-menus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. For more information concerning menus, sub-menu and menu items, see *"Menus, Sub-Menus and Menu Items"* on page 7.

Two buttons are at the top of the menu bar:

- **Expand All**
  Expands all of the menus
- **Collapse All**
  Collapses all of the menus

The icon in the top right-hand corner of the menu bar hides or displays the menu bar.

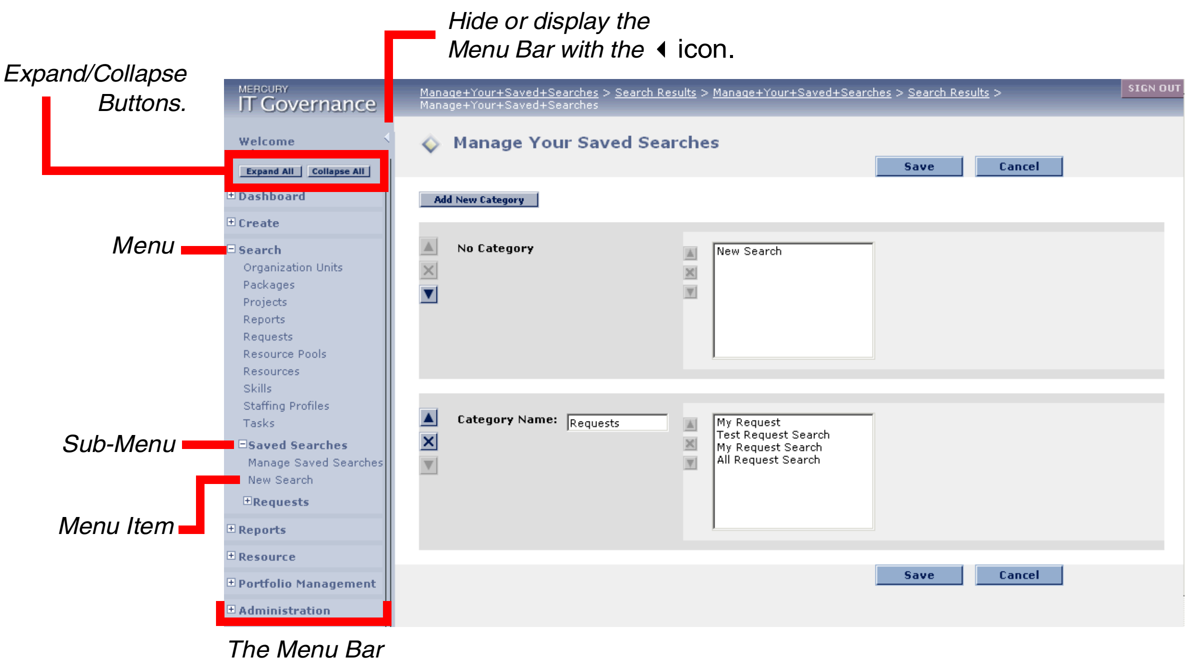


Figure 2-2 The Menu Bar

Menus, Sub-Menus and Menu Items

Menus and sub-menus organize menu items. Menu items are linked to pre-defined pages. Linked pages perform tasks, such as creating Budgets, running reports or performing searches. Selecting a menu item opens the associated linked page. *Figure 2-2* shows an example of the Manage Your Saved Searches page open in the Dashboard.

Table 2-1 lists the default menus available in the menu bar.

Note

Not all users can view and access all Menus. Menu access depends on:

- The appropriate licenses.
- The appropriate Security Group setting.

Table 2-1. Dashboard Menus

Menus	Description
Dashboard	Top-level grouping of available pages. Includes a link to the page last visited and a list of pages (tabs) set-up by the user (Front Page, etc.).
Create	Create or start something new, such as creating a Budget or creating a Package.
Search	Locate data within the system, such as finding budgetary data or finding Project data.
Reports	Get information, such as comparing Oracle environments or getting the history of a Package.
Resources	Create, view or edit information related to Resources, such as creating a staffing profile or modifying a resource pool.
Cost	Manage the monetary aspects of a Project, such as creating a Budget or analyzing the current cost of a Project.
Demand	Capture and manage all demands placed on an IT organization, such as scheduling Demand or getting the history of a Demand.
Team Manager	Capture and manage specific demands placed on an IT organization, such as getting an overview of specific demands or analyzing specific demands.
PMO	Manage all aspects of Projects and Programs, such as creating a Program or requesting a Project resource.
Time	Manage time for Resources, such as creating a time sheet or approving a time sheet.
Administration	Perform administrative tasks such as opening the Workbench interface.

Table 2-1. Dashboard Menus [continued]

Menus	Description
Settings	Perform system tasks such as setting the user password.
Help	Search for help concerning Mercury IT Governance Center; also provides a link to Mercury ITG education.

Navigation Path

The Navigation path lists the pages opened during the current Dashboard session (see *Figure 2-3*). Users can access previously visited pages by selecting entries in the Navigation path. As the list of visited pages grows, older accessed pages are scrolled off the Navigation path.

The Navigation Path

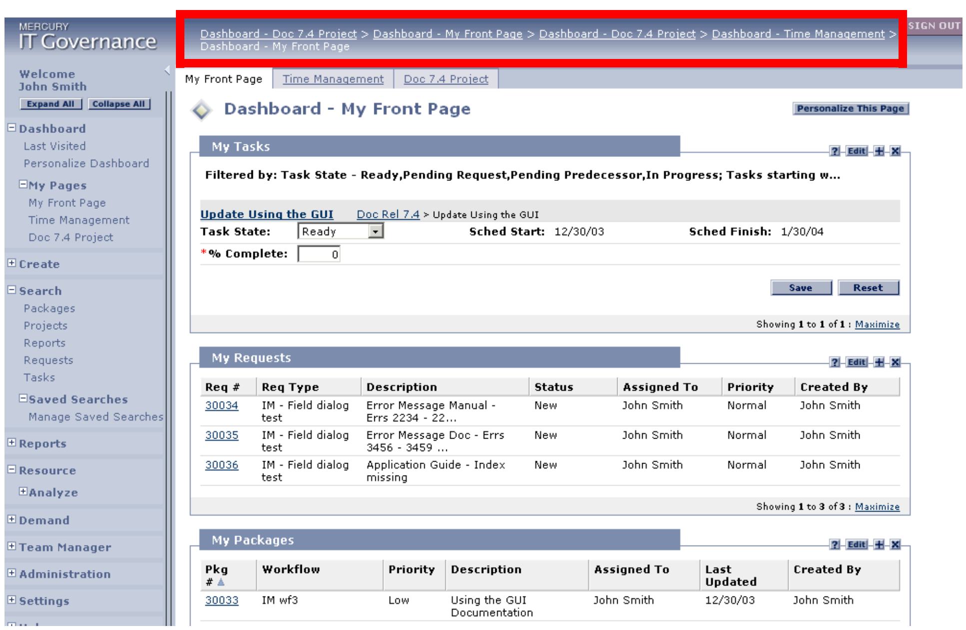


Figure 2-3 The Navigation Path

Dashboard

The Dashboard collects system data and displays it to the user. Each user can personalize the Dashboard to display only the information relevant to their duties (see *Figure 2-4*). Each Dashboard page has a tab at the top of the page. Selecting a tab opens that Dashboard page. Menu Items are found on the Menu bar. Menu Items are linked action pages, such as search pages, administration pages and report pages. For more information concerning Dashboard pages, see *"Dashboard Pages"* on page 10.

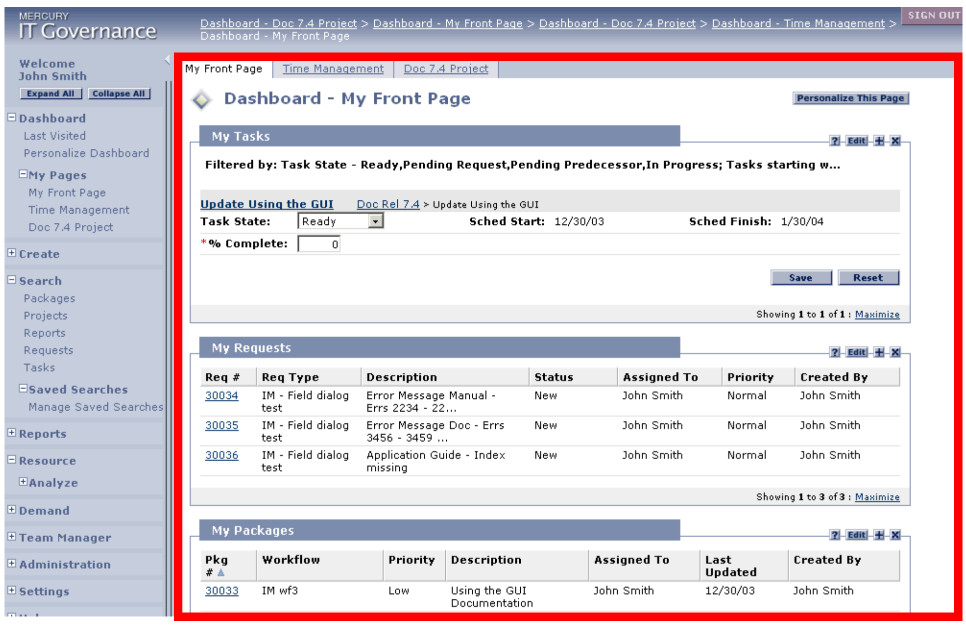


Figure 2-4 The Dashboard

Dashboard Pages

Dashboard pages contain Portlets that provide views into the Mercury IT Governance Center data. Your Dashboard can contain one or many pages. Move between Dashboard pages by selecting the tab at the top of a page. *Figure 2-5* displays a Dashboard page selected on the Dashboard.

Dashboard pages can be added and removed from the Dashboard. Additionally, Portlets can be added and removed from the Dashboard pages. For more information concerning Portlets, see *"Portlets"* on page 12.

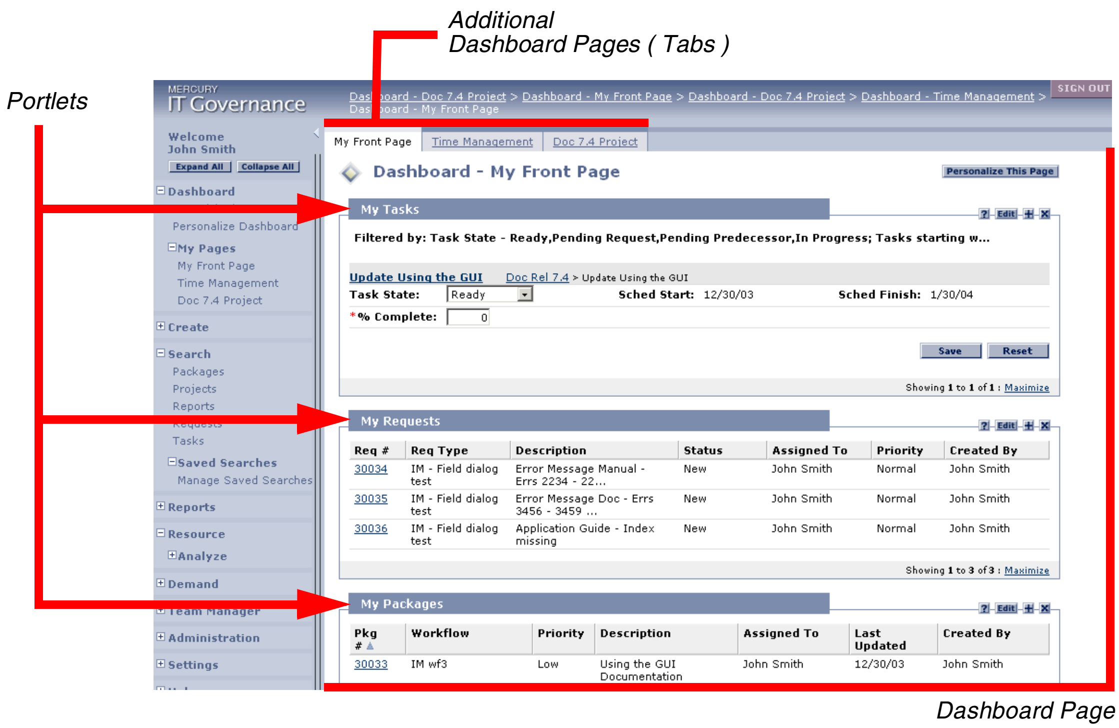


Figure 2-5 Example of a Dashboard page

Published Dashboard Pages

Published Dashboard pages are Dashboard pages configured by the application administrator (or an advanced user with the correct Access Grants) and published to one or many Dashboards. Published Dashboard pages are required Dashboard pages can not be edited or removed from the Dashboard by the owner of the Dashboard. Only the application administrator (or an advanced user with the correct Access Grants) can remove or replace a Published Dashboard page. Additionally, the Portlets on a Published Dashboard page can not be edited or removed by the owner of the Dashboard.

Project Overview Page

The Project Overview page is a specialized Dashboard page providing one-stop viewing of Project-specific data. The Project Overview page consists of unique Project Management-related Portlets. The Project Overview page can be personalized to display data relevant to a specific Project. *Figure 2-6* illustrates the Project Overview page. To open the Project Overview page, see *"Opening the Project Overview Page"* on page 32.

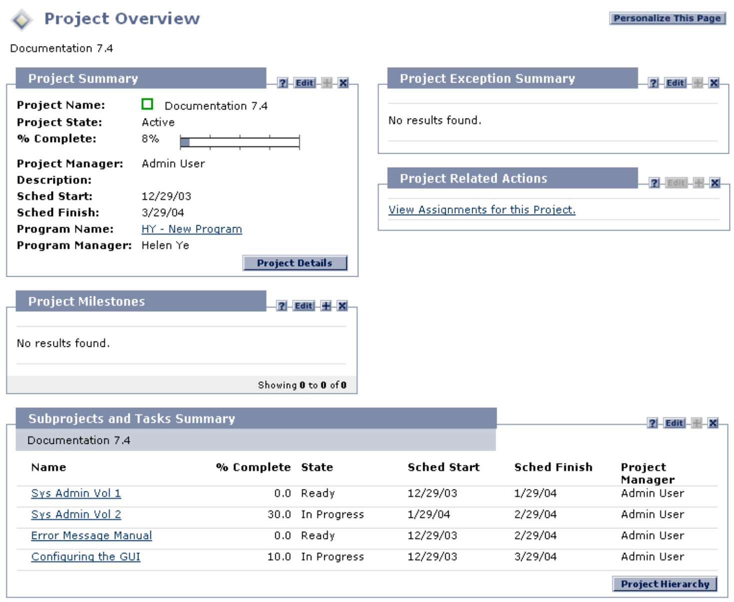


Figure 2-6 Project Overview Page

Portlets

Portlets are role-based visual displays providing relevant summary information concerning business data. In essence, Portlets are the way data contained within Mercury IT Governance Center is presented.

This section covers the following topics:

- *"Portlet Overview"* on page 12
- *"Portlet Help Page"* on page 14
- *"Portlet Edit Page"* on page 15
- *"Portlet Maximize Page"* on page 16
- *"Portlet Drill Down Page"* on page 17

Portlet Overview

Portlets display information captured by Mercury IT Governance Center. Depending on the Portlet, the data can be presented in tabular form, as a bar graph, pie chart, bubble chart or as a Gantt chart. Multiple Portlets can be displayed on a single Dashboard page and multiple Dashboard pages can have the same Portlet (see *Figure 2-7*).

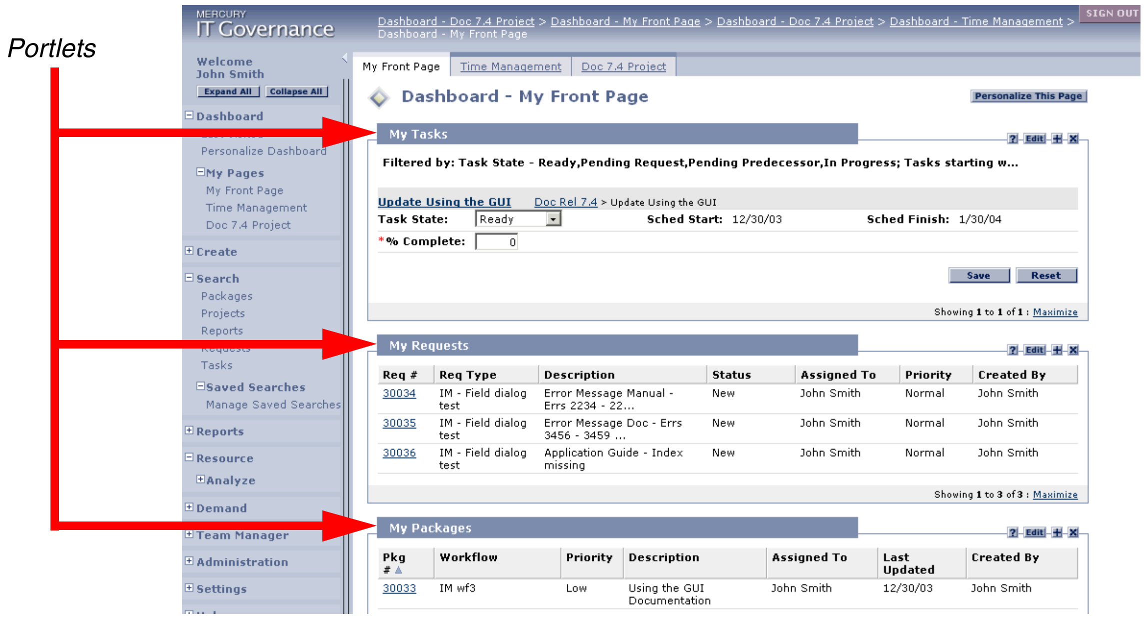


Figure 2-7 Portlets on a Dashboard page

Portlets consists of a title, the data, links, buttons and icons (see *Figure 2-8*). Portlets are highly personalizable. Portlets can be edited, removed and maximized to see all relevant returned values.

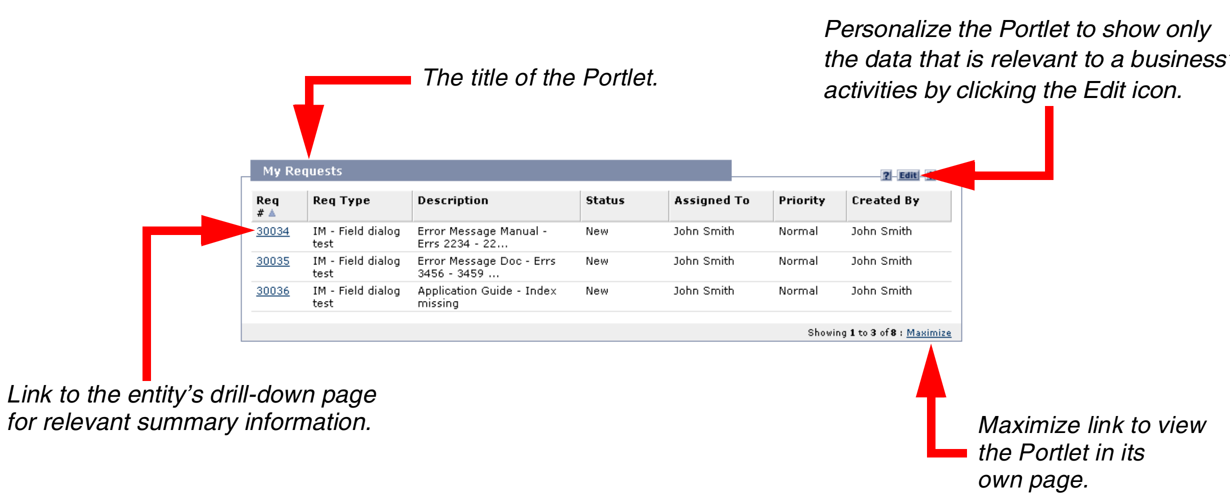


Figure 2-8 Portlet Interface

Note

Not all buttons and links are available on all Portlets. If a Portlet is missing an button, that functionality does not exist for the Portlet.

Portlet Data Lists

Some Portlets display data in a column and row format. Column headings with the sort icon ( ) indicate the data is sorted by that column. When the sort icon points down ( ), the data is sorted in alphanumeric order from first to last. When the sort icon points up ( ), the data is sorted in alphanumeric order from last to first. *Figure 2-9* illustrates the My Requests Portlet sorted by the Req # (Request number) column from lowest to highest Request number.

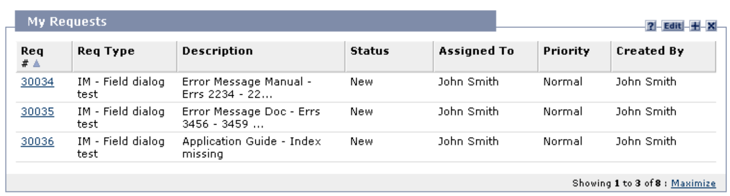


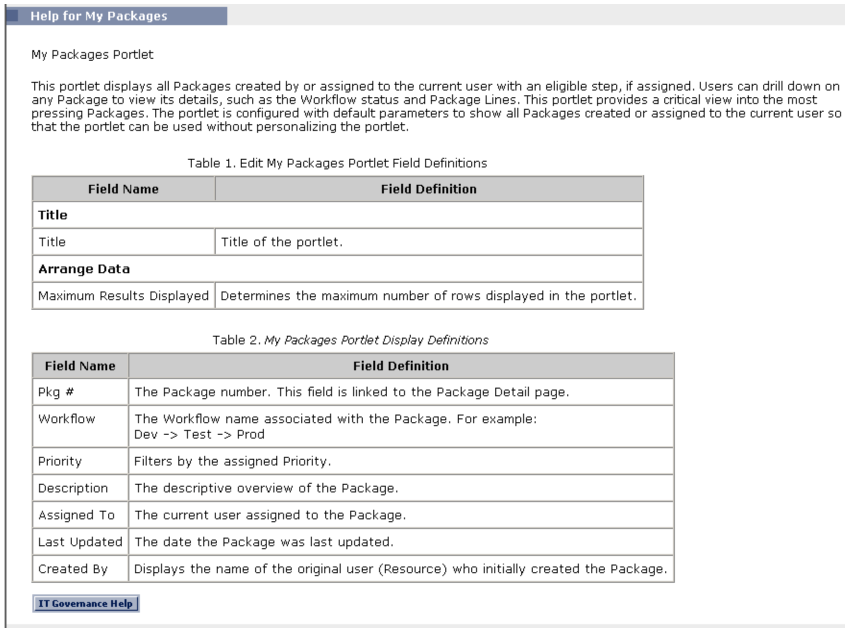
Figure 2-9 My Requests Portlet

Portlet Help Page

Clicking the **Help** button ( ) opens a Portlet's Help page. A Portlet's Help page contains useful information regarding the Portlet. This information includes an explanation of the Portlet and definitions for all of the Portlet's filter fields. See *Figure 2-10* for an example of a Portlet Help page.

Note

Not all Portlets have a Portlet Help page.



Help for My Packages

My Packages Portlet

This portlet displays all Packages created by or assigned to the current user with an eligible step, if assigned. Users can drill down on any Package to view its details, such as the Workflow status and Package Lines. This portlet provides a critical view into the most pressing Packages. The portlet is configured with default parameters to show all Packages created or assigned to the current user so that the portlet can be used without personalizing the portlet.

Table 1. Edit My Packages Portlet Field Definitions

Field Name	Field Definition
Title	
Title	Title of the portlet.
Arrange Data	
Maximum Results Displayed	Determines the maximum number of rows displayed in the portlet.

Table 2. *My Packages Portlet Display Definitions*

Field Name	Field Definition
Pkg #	The Package number. This field is linked to the Package Detail page.
Workflow	The Workflow name associated with the Package. For example: Dev -> Test -> Prod
Priority	Filters by the assigned Priority.
Description	The descriptive overview of the Package.
Assigned To	The current user assigned to the Package.
Last Updated	The date the Package was last updated.
Created By	Displays the name of the original user (Resource) who initially created the Package.

IT Governance Help

Figure 2-10 Portlet Help Page

Portlet Edit Page

Clicking the **Edit** button (Edit) opens a Portlet's Edit page. Use a Portlet's Edit page to configure the Portlet to meet specific needs, such as the number of results to display, fields to display, and the name of the Portlet (see *Figure 2-11).*

Note: Some Portlets can not Portlets be personalized.

The Portlet Edit page consists of the following sections:

- Title
- Filter By
- Arrange Data

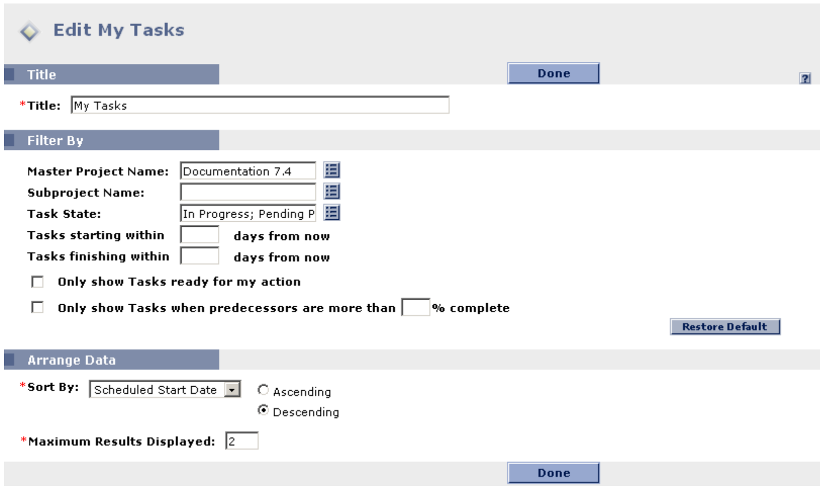


Figure 2-11 Example Edit Page

The Title section on a Portlet's Edit page lists the name of the Portlet in the Title field. The Title field can be edited to display a more useful title.

The Filter By section on a Portlet's Edit page lists the search criteria of the Portlet. Red asterisks appear next to required fields. Depending on the Portlet, sub-sections can appear under the Filter By section, such as Time, Request Criteria and User Data.

The Arrange Data section on a Portlet's Edit page details how to arrange and sort the returned values of the search. This field sets which column to sort by and whether to list the returned values in ascending or descending order.

Depending on the Portlet, subsections can appear under the Arrange Data section, such as Choose Columns.

Portlet Maximize Page

Clicking the **Maximize** button ( ) or (Maximize) the opens a Portlet's Maximize page. Portlets on a Dashboard page are usually configured to list a limited number of results. A Portlet's Maximize page can list all of the results. *Figure 2-12* shows a Portlet on a Dashboard page and a Portlet's Maximize page.

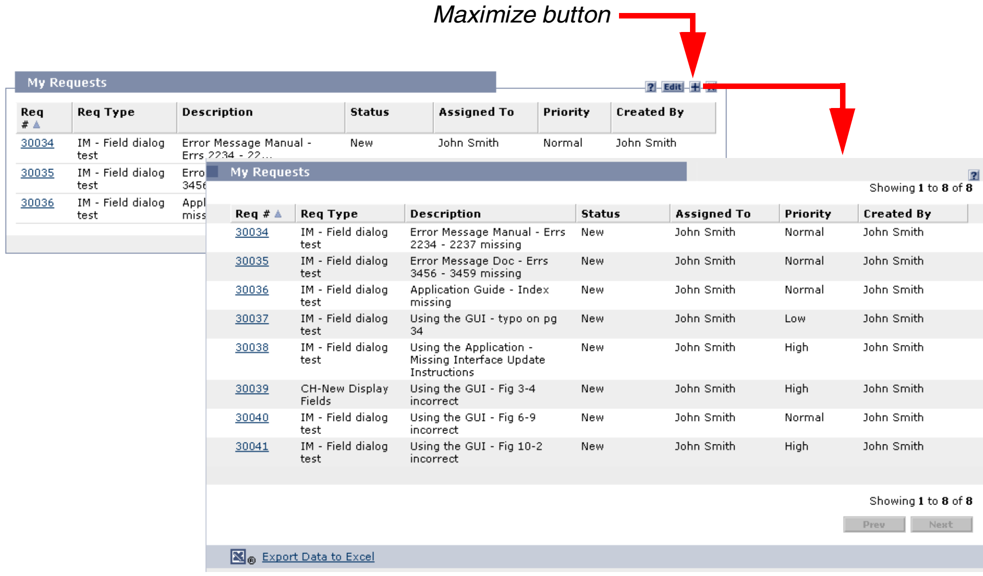


Figure 2-12 Portlet Maximized Page

> **Note**
>
> The number of entities displayed on a Portlet's Maximized page is configured through **Settings > Edit My Profile**.

Portlet Drill Down Page

Links on a Portlet open a Portlet's Drill Down page (see *"Portlet Drill Down Page"* on page 17). A Portlet Drill Down page contains the additional or background information for an entry on the Portlet.

Typically, a Portlet is personalized to display the most important and relevant data. A Drill Down page provides more detailed information regarding the linked item. For example, clicking on the Request # in the My Requests Portlet drills down to the linked Request's detail page. *Figure 2-13* illustrates a Portlet's Drill Down page.

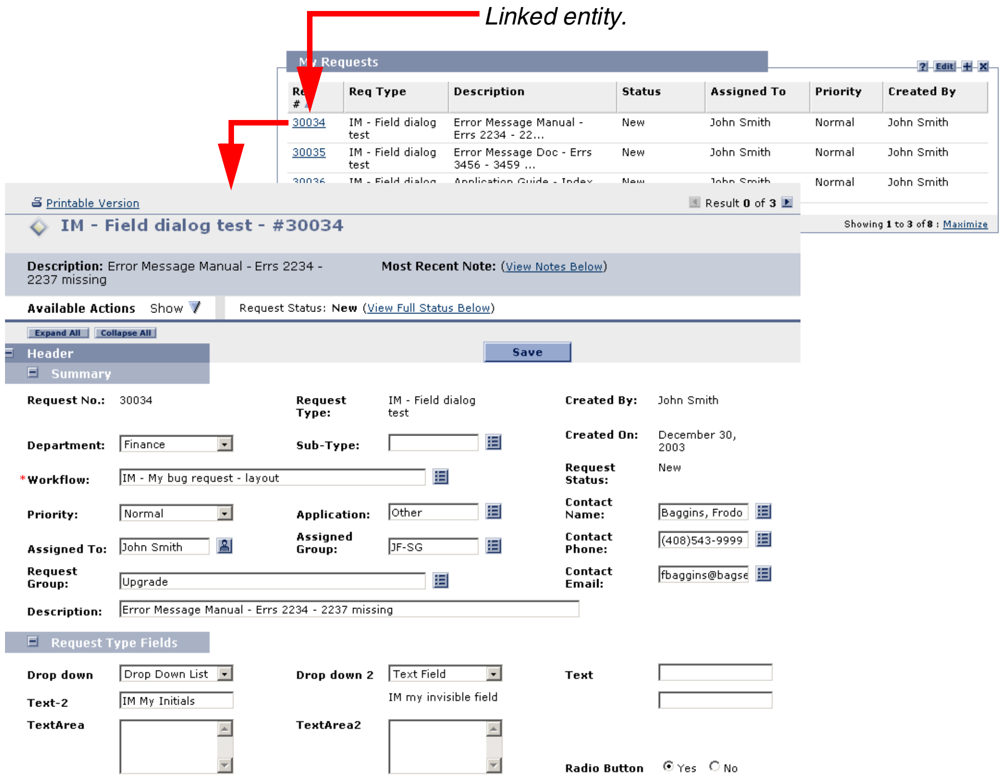


Figure 2-13 Portlet Drill Down Page

Exporting Data to Excel

Clicking on the **Export Data to Excel** button (Export Data to Excel) exports data from the Portlet to Microsoft Excel. When an export is initiated, a browser page is opened and the Portlet's data is displayed in a Microsoft Excel spreadsheet. Once the data is imported into Microsoft Excel, all the standard Excel functions are available, including the ability to save the spreadsheet.

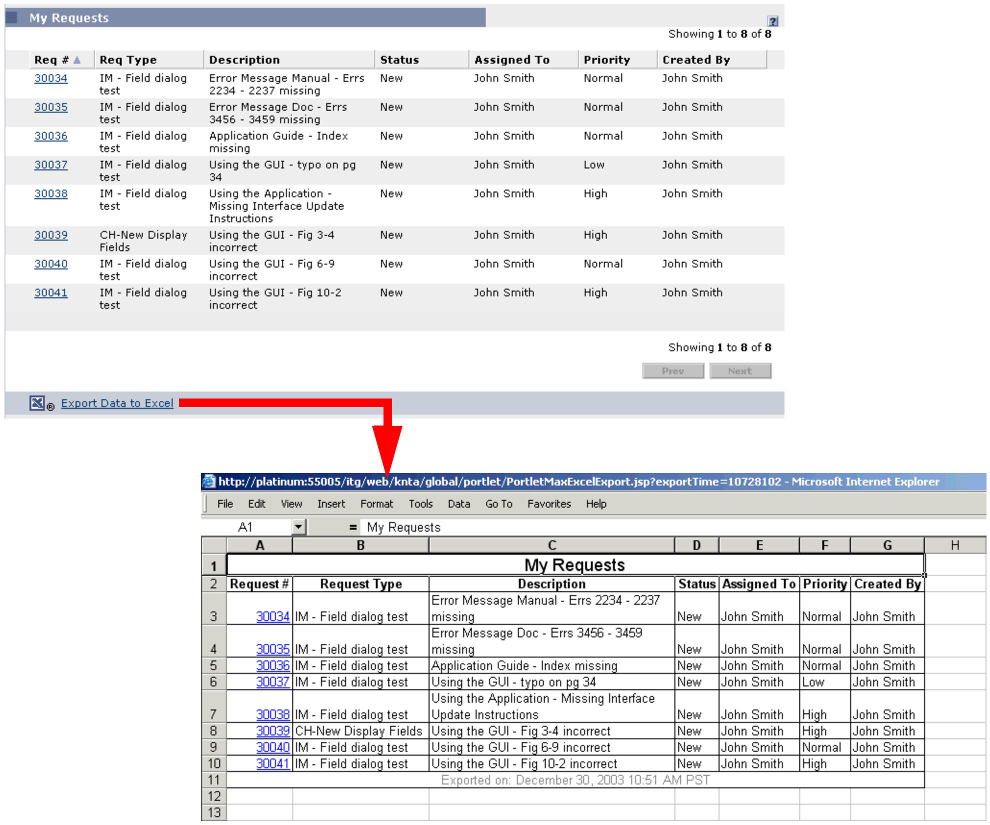


Figure 2-14 Export to Excel

Personalization

Personalization refers to the editing and configuring of the IT Governance interface. The following lists the levels of personalization:

- Personalizing a Dashboard - adding or removing Dashboard pages from the Dashboard.
- Personalizing a Dashboard page - adding, moving or deleting Portlets on a Dashboard page.
- Personalizing a Portlet - customizing a specific Portlet to display only the information relevant to a specific Project, Task, Package, Program or Request.

Note

Portlets can not be added or deleted from Published Dashboard pages. Additionally, Portlets on Published Dashboard pages can not be personalized.

Chapter

3

Using the Dashboard

The chapter details specific step-by-step procedures when using the Mercury IT Governance Dashboard.

This chapter discusses the following topics:

Logging On and Off the Dashboard

The Dashboard is accessed through a Web browser over a network. This section details the steps required to logon to the Dashboard and to log off the Dashboard.

To Logon to the Dashboard:

1. Contact the System Administrator or Webmaster to obtain the following:
   - Web address (URL)
   - A username
   - A password
2. From the browser, access the web address.

   The Mercury IT Governance Logon page opens.

3. In the Username field, enter the username.
4. In the Password field, enter the password.

Tip

To have the server retain a password, click the **Remember my logon** check box. Once this check box is selected, a logon password will not be required.

Note

First time user's might be prompted for a new password.

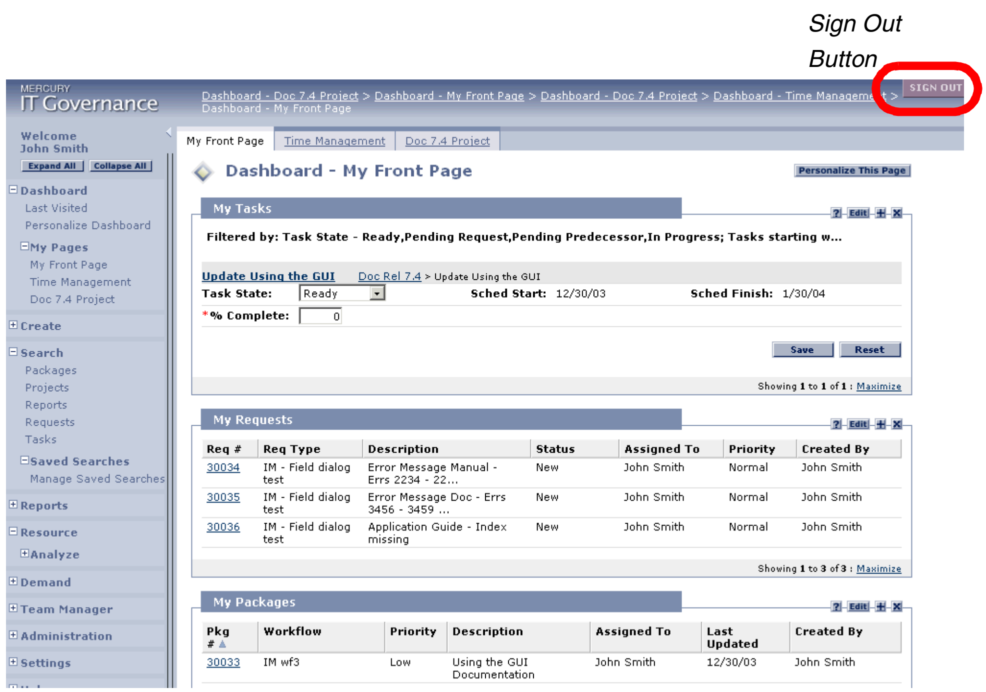
5. Click **Submit**.

   The Dashboard opens.

To Log Off the Dashboard:

1. In the upper right hand corner of the Dashboard, click **Sign Out**.

   The Dashboard closes.



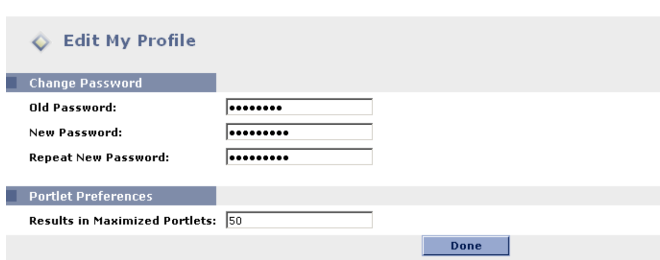
Changing a Password

A user's password is changed on the Edit my Profile page.

To change a password:

1. On the Menu bar, click **Settings > Edit my Profile**.

   The Edit My Profile page opens.



2. In the Old Password field, enter the existing password.
3. In the New Password field, enter the new password.
4. In the Repeat New Password field, re-enter the new password.
5. Click **Done**.

   The new password is accepted.

Configuring a Portlet Maximize Page

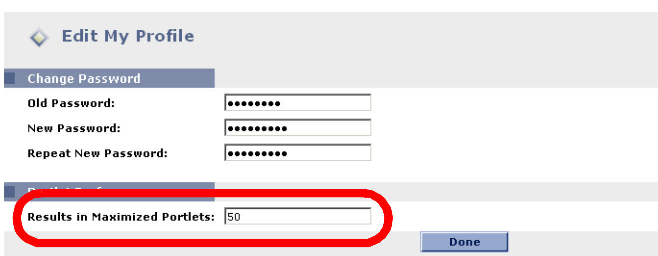
Change the number of entities on a Portlet's Maximize page on the Edit My Profile page.

To configure a Portlet's maximize page:

1. On the Menu bar, click **Settings > Edit my Profile**.

   The Edit My Profile page opens.

2. In the Results in Maximized Portlets field, enter the number of lines (entities) to be listed in a Portlet's Maximize page.



3. Click **Done**.

   The new Results in Maximized Portlets parameter is accepted.

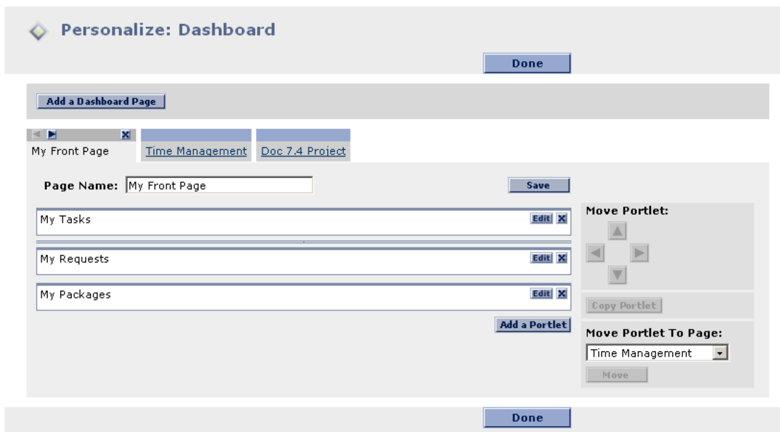
Adding a Dashboard Page

Dashboard pages allow users to group similar Portlets. For example, each Dashboard page can represent a view into a single Project or work group.

To add a Dashboard page:

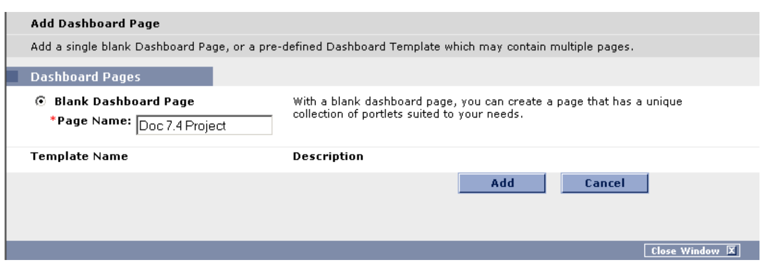
1. On the Dashboard, click **Personalize This Page** ().

   The Personalize: Dashboard page opens.



2. Click **Add a Dashboard page**.

   The Add a Dashboard page opens.



3. On the Add a Dashboard Page, select a radio button for the type of Dashboard page to add.

   The number and definition of available Dashboard pages depends on the specific site.

4. In the Page Name field, enter the name for the new Dashboard page.

5. Click **Add**.

   The new Dashboard page is added to the Dashboard. Portlets on the new Dashboard page can now be personalized. See *"Personalizing a Portlet"* on page 30.

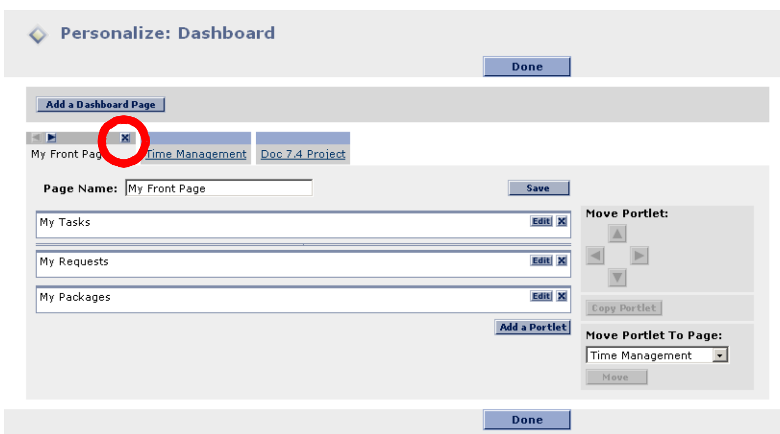
Deleting a Dashboard Page

Dashboards are deleted on the Personalize: Dashboard page.

To delete a Dashboard page:

1. Click **Personalize This Page** (Personalize This Page).

   The Personalize: Dashboard page opens.



2. In the upper right-hand corner of the Dashboard page's tab, click the delete button ( ).

   The selected Dashboard page is deleted from the Dashboard.

Adding Portlets to the Dashboard Page

The Dashboard enhances the interaction with business data by providing configurable views. Each licensed product has a number of associated Portlets which can be added to a Dashboard page. See *"System Portlets"* on page 37 for a list of all available Portlets.

Note

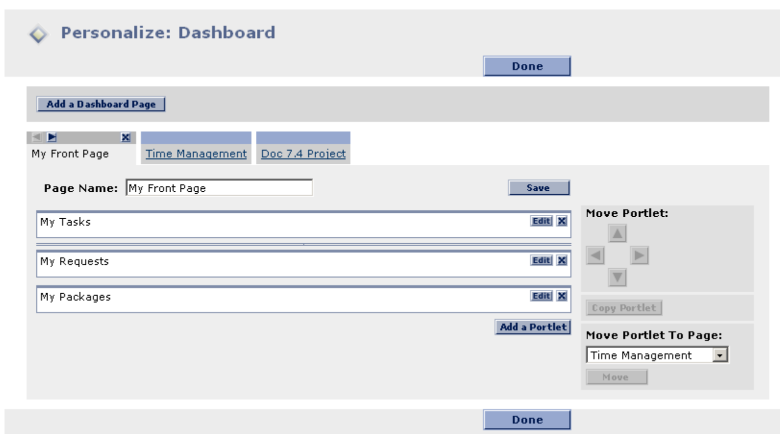
Portlets can not be accessed and viewed by all users. Portlet access depends on:

- The appropriate licenses.
- The appropriate Security Group setting.

To add a Portlet to a Dashboard page:

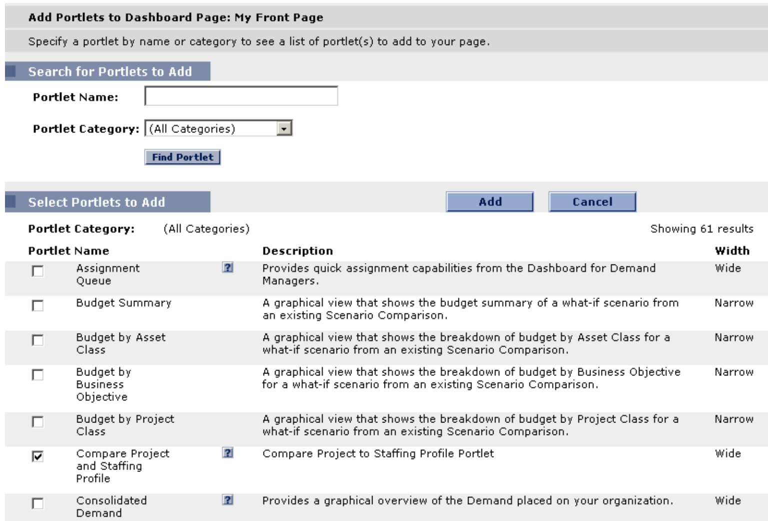
1. Click **Personalize This Page** (Personalize This Page).

   The Personalize: Dashboard page opens.



2. Click **Add a Portlet**.

   The Add a Portlet page opens.



3. Add a Portlet using one of the following methods:

   a. In the Portlet Name field, enter some or all of the Portlet's name.

   b. Under the Search for Portlets to Add heading, click **Find Portlet**.

      A list of Portlets matching the search criteria is returned.

   c. Select a Portlet to be added to the Dashboard page.

      Portlets listed with a **Help** icon (?) include a Portlet Help page. Portlet Help pages provide an explanation of the Portlet. Click the **Help** icon to open the Portlet's Help page.

   d. Click **Add**.

      The Portlet is added to the Dashboard page.

   or

   e. From the Portlet Category drop-down list, select a category.

      The drop-down list identifies the available groupings of Portlets, such as **Demand Management**.

   f. On the Add a Portlet page, click **Find Portlet**.

A list of Portlets associated with the chosen Portlet category is returned.

g. Select a Portlet to be added to the Dashboard page.

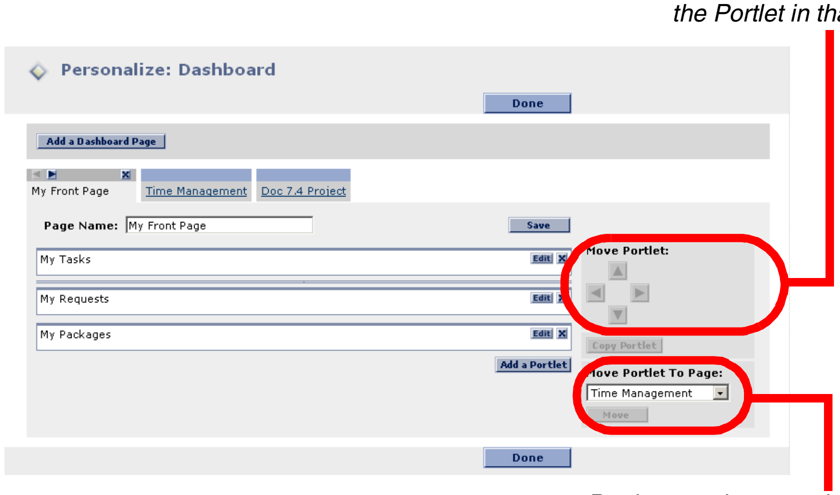
Portlets listed with a **Help** icon (?) include a Portlet Help page. Portlet Help pages provide an explanation of the Portlet. Click the **Help** icon to open the Portlet's Help page.

h. Click **Add**.

The Portlet is added to the Dashboard page.

4. Move the Portlet to the area where it should appear on the Dashboard.

Select (highlight) the Portlet to be moved and click the directional arrows to move the Portlet in that direction.



Portlets can be moved to a different Dashboard page using the Move Portlet to Page drop down list and Move button.

5. Personalize the Portlet.

a. On the Add a Portlet page, select the Portlet.

b. Click **Edit**.

The Portlet's edit page opens. (For information detailing how to personalize a Portlet, see *"Personalizing a Portlet"* on page 30.)

6. Once the Portlet is positioned and personalized, click **Done**.

   The new Portlet is added to the selected Dashboard page.

Tip

Not all Dashboard pages can be personalized. If **Personalize This Page** (Personalize This Page) does not appear on the Dashboard page, a Portlet cannot be added to that Dashboard page.

The same Portlet can be added to the same Dashboard page multiple times. Each version of the Portlet can then be edited to display a different view.

Deleting a Portlet From the Dashboard Page

To delete a Portlet from the Dashboard:

1. In the upper right-hand corner of a Portlet, click the delete button ( ).

   The Portlet is deleted from the Dashboard page.

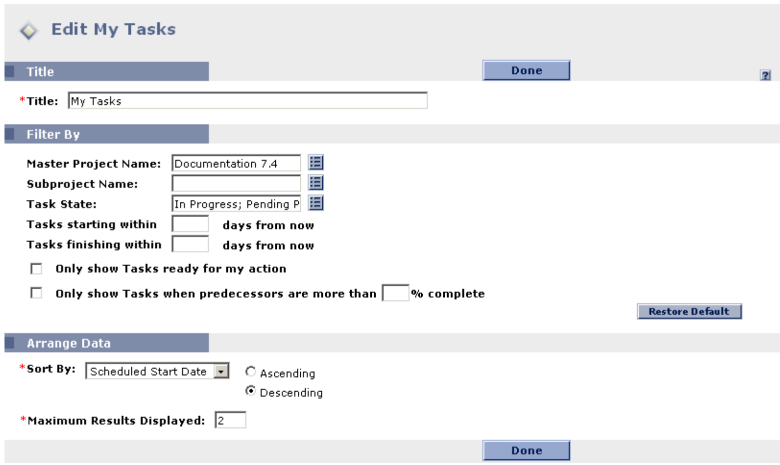
Personalizing a Portlet

Portlets can be personalized to show information relevant for each user. For example, a manufacturing manager might want to see information related to recently recorded critical production defects. The manager could select the Request List Portlet on the Dashboard (which provides visibility into the system capturing those defects). The manager could then personalize the Request List Portlet to show all High and Critical priority requests assigned to his team members.

To Personalize the contents in a Portlet:

1. On the Portlet, click **Edit** (Edit).

   The **Edit** button is located in the top right corner of the Portlet. The Portlet's Edit page opens.



Note

The fields in the Filter By section are different for different Portlets.

2. In the Title field, enter a new name for the Portlet.

   The Title field can be edited to display a more useful title, such as Project Management Tasks.

3. In the Filter By section, select what information to display.

   The Filter By section selects the Portlet's search criteria. Red asterisks appear next to required fields.

4. In the Arrange Data section, select how to display the information.

   The Arrange Data section arranges and sorts the returned values of the search. This section sets which column to sort by, whether to list the returned values in ascending or descending order, the number of entities to list in the Portlet.

Note

Additional returned values are accessible by clicking the **Maximize** button at the bottom of the Portlet.

Depending on the Portlet, subsections can appear under the Arrange Data section, such as Choose Columns. Columns are highlighted in the Available Columns field and moved to the Selected Columns field using the side to side arrows. Additionally, highlighted columns in the Selected Columns field can be moved up and down using the up and down arrows.

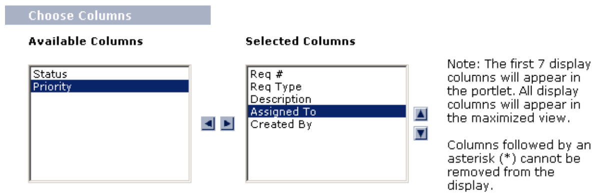


Figure 3-1 Choose Columns

Note

Some Portlet Edit pages do not have the Choose Columns section.

5. On the Portlet's Edit page, click **Done**.

   The Portlet displays the configured information.

Opening the Project Overview Page

The Project Overview page provides a one-stop view into Project-specific data.

To open the Project Overview page:

1. On the Menu bar, click **Search > Projects**.

   The Project Search page opens.

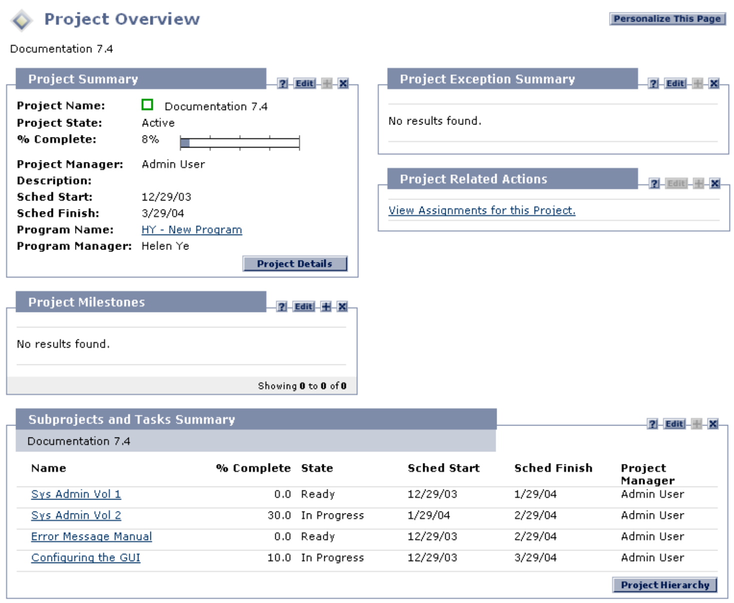
2. In the Project Search page, enter search criteria.

3. Click **Search**.

   A list of Projects opens.

4. Click a Project name.

The Project Overview page for the selected Project opens.



Exporting Data to an Excel Spreadsheet

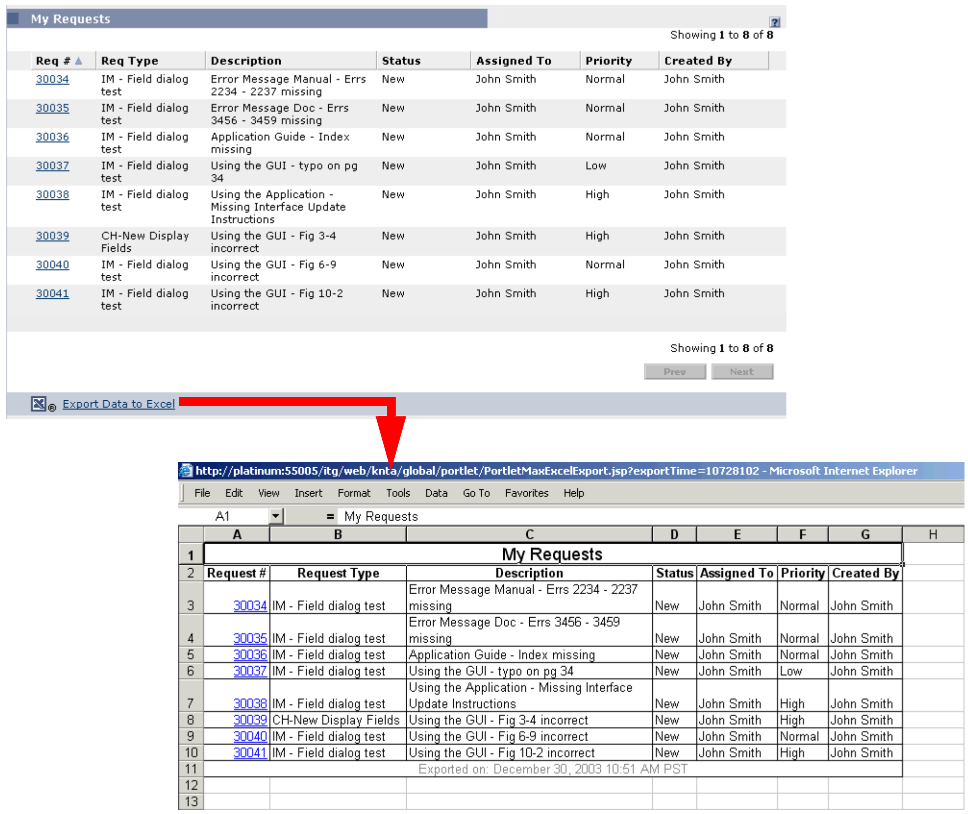
This section details how to export data from some Portlet pages or search results pages into an Excel spreadsheet.

To Export Data to an Excel Spreadsheet:

1. Select a Portlet or a search results page containing the **Export Data to Excel** icon (Export Data to Excel).

2. From the selected Portlet, click the **Export Data to Excel** icon.

   When an export is initiated, a browser page is opened and the Portlet's data is displayed in a Microsoft Excel spreadsheet. Once the data is imported into Microsoft Excel, all the standard Excel functions are available, including a save of the file.



Request #	Request Type	Description	Status	Assigned To	Priority	Created By
30034	IM - Field dialog test	Error Message Manual - Errs 2234 - 2237 missing	New	John Smith	Normal	John Smith
30035	IM - Field dialog test	Error Message Doc - Errs 3456 - 3459 missing	New	John Smith	Normal	John Smith
30036	IM - Field dialog test	Application Guide - Index missing	New	John Smith	Normal	John Smith
30037	IM - Field dialog test	Using the GUI - typo on pg 34	New	John Smith	Low	John Smith
30038	IM - Field dialog test	Using the Application - Missing Interface Update Instructions	New	John Smith	High	John Smith
30039	CH-New Display Fields	Using the GUI - Fig 3-4 incorrect	New	John Smith	High	John Smith
30040	IM - Field dialog test	Using the GUI - Fig 6-9 incorrect	New	John Smith	Normal	John Smith
30041	IM - Field dialog test	Using the GUI - Fig 10-2 incorrect	New	John Smith	High	John Smith

Exported on: December 30, 2003 10:51 AM PST

Notes on the Excel Export

Most data from search results and maximized Portlet pages is exported “as-is” and Excel translates the data into the various formats. There are a few exceptions. Those exceptions are:

- Red, Yellow, or Green indicators translate into a shaded cell with a white ‘R’, ‘Y’, or ‘G’ letter.
- Task Exception indicators translate into a red exclamation mark.
- Milestone indicators translate into a black diamond character.
- Status bars export with the percentage number plus a percent (%) character.
- Currency values export with the currency sign and any commas and periods.
- Links to URLs export but are altered to open in a new browser page (instead of the current browser page).

- Checkboxes in search results are not exported.

Note

Some pages can not export data to an Excel spreadsheet. Typically, two types of pages support the export functionality.

- Search Results Pages – For standard searches, the user is able to export the results page to an Excel spreadsheet. The exports all of the queried results, not just the results on the page (i.e. no need to do a previous/next and export each page). If a search reaches the maximum number of rows, only that maximum number of rows is exported. Columns are exported to the Excel spreadsheet in the same order as displayed in the results.
- Portlet Maximized Pages - In table and some graph Portlets, the Portlet's Maximize page can be exported into an Excel spreadsheet. Exporting data into an Excel spreadsheet also supports a Portlet's Drill Down pages (Project Overview and custom Overview pages). If the maximum number of entities for the Portlet is reached, only that maximum number of entities is exported. Columns are exported to the Excel spreadsheet in the same order as displayed in the results.

Exporting Portlet data into an Excel spreadsheet does not support the following:

- Graphical Portlets (standard or custom)
- JSP Portlets (updateable Portlets, My Tasks, the Gantt Chart Portlet, etc.)
- Form Portlets (Project Overview)
- Any Portlet not supporting a Portlet Maximize page

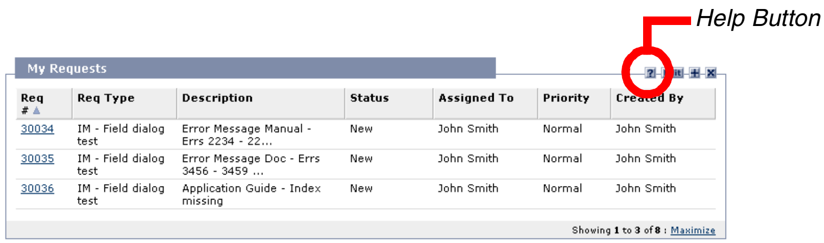
Using Online Help

This section details how to access online help.

To access a Portlet's Help page:

1. On a Portlet, click the Portlet's **Help** icon(?).

   A new page containing the Portlet's help information opens.



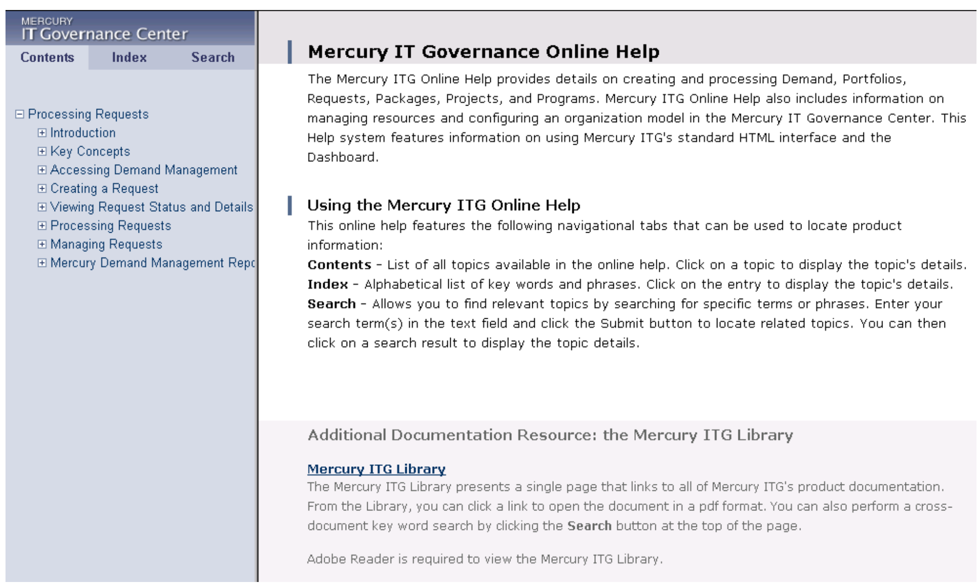
Note

Portlets do not have Help pages if the **Help** icon (?) is not present.

To access Online help:

1. On the Navigation bar, select **Help > Contents and Index**.

   The Online Help page opens.



Appendix A System Portlets

This appendix lists the following:

- Mercury Financial Management Portlets, listed in *Table A-1 on page 38*
- Mercury Change Management Portlets, listed in *Table A-2 on page 39*
- Mercury Demand Management and Request Portlets, listed in *Table A-3 on page 40*
- Mercury Portfolio Management Portlets, listed in *Table A-4 on page 42*.
- Mercury Program Management Portlets, listed in *Table A-5 on page 43*.
- Mercury Project Management Portlets, listed in *Table A-6 on page 44*.
- Mercury Project Management (Project Overview) Portlets, listed in *Table A-7 on page 47*
- Mercury Resource Management Portlets, listed in *Table A-8 on page 48*
- Mercury Time Management Portlets, listed in *Table A-9 on page 49*

Note

Some users can not view and access all Portlets. Portlet access depends on:

- The appropriate licenses.
- The appropriate Security Group setting.

Table A-1. Financial Management Portlets

Financial Management Portlets	Description
Budget To Budget Comparison	Displays a Budget to Budget Comparison bar chart. Allows a comparison of one or more Allocation Budgets to one or more Allocated Budgets. This allows users to compare one budgeted allocation to another.
Cumulative Cost Metrics (Program)	Displays a trend chart analyzing the cumulative cost metrics for a Program. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Cumulative Cost Metrics (Project)	Displays a trend chart analyzing the cumulative cost metrics for a Project. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Current Cost Metrics (Program)	Displays an analysis of the Current Cost Metrics for a Program. Displays a bubble chart analyzing the current cost metrics for a Program. The bubble chart can be used to show current cost status of a Project or current cost status of a Program.
Current Cost Metrics (Project)	Displays an analysis of the Current Cost Metrics for a Project. Displays a bubble chart analyzing the current cost metrics for a Project. The bubble chart can be used to show current cost status of a Project or current cost status of a Program.
Project Cost Summary	Displays a list of cost information for a Project.

Table A-2. Change Management Portlets

Change Management Portlets	Description
My Packages	Displays all Packages created by or assigned to the current user. Users can drill down on any Package to view its details, such as the Workflow status and Package Lines. This Portlet provides a critical view into the most pressing Packages.
Package Activity	Displays activity information about the number of deployments (Package Line execution step transactions) completed during the last three weeks. Users can drill down on any Object Type or Environment to view the included Packages.
Package List	Displays general information about Packages, such as their description and status. This Portlet can be personalized to display information based on various Package related criteria. This enables users to display only the Packages relevant to their personal activities.
Package List (Expanded)	Displays general information about Packages, such as their description and status. This Portlet can be filtered for the same Package criteria as the Package List Portlet, but displays more detailed Package information on the Dashboard.
Package Reference	Displays the References attached to the Package based on filters such as Reference Types, Relationship, and the time period when they were added.
Package Summary Bar Chart	Displays information in the form of a bar chart about groups of Packages, including priority, ‘Assigned To’ user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages comprising the group’s total number.
Package Summary Pie Chart	Displays information in the form of a pie chart about groups of Packages, including priority, ‘Assigned To’ user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages comprising the group’s total number.

Table A-2. Change Management Portlets [continued]

Change Management Portlets	Description
Pending Deployment	Displays general information about Packages which have not been deployed. This Portlet provides visibility into scheduled or required Package migration.

Table A-3. Demand Management and Request Portlets

Demand Management Portlets	Description
Assignment Queue	Provides a personalized view into the Demand not assigned to a resource. This Portlet assigns a user as a resource to a Request.
Consolidated Demand	Provides a graphical overview of the Demand placed on an organization.
Demand by Category	Provides a quick view into different areas of Demand. This Portlet provides a quick, graphical Demand summary and can be grouped by Department, Demand Type, Priority, etc.
Demand List	Provides a personalized list of the demand placed on an organization or individual. This Portlet can be personalized to display Demand filtered based on specified criteria (Demand Type, Priority, Demand Disposition, etc.)
My Requests	Displays all Requests created by or assigned to the current user. This Portlet provides a critical view into the most pressing Requests and nearing deadlines.
Open Requests by Priority	Displays a bar chart of the number of Requests currently open, grouped by priority. This Portlet provides a graphical representation to help the user visualize and group a business' open issues.
Request Activity	Displays general activity information such as the number of Requests opened and closed during the last two weeks, and the number of open Requests. This Portlet provides visibility into high traffic Request Types as well as the groups or users assigned to address them.

Table A-3. Demand Management and Request Portlets [continued]

Demand Management Portlets	Description
Request List	Displays general information about Requests, such as their description and status. This Portlet can be personalized to display information based on specific Request numbers or other Request related criteria. This enables users to display only the Requests relevant to their personal activities.
Request List (Expanded)	Displays general information about Requests, such as their description and status. This Portlet can be filtered for the same Request criteria as the Request List Portlet, but displays more detailed Request information.
Request References	Displays the References attached to the Request based on filters such as Reference Types, Relationship, and the time period when they were added.
Request Summary	Displays information about groups of Requests, including priority, type, status and the total number of Requests for each category. Users can drill down on any group of Requests and individual Requests of the group’s total number.
Request Summary Bar Chart	Displays a bar chart allowing users to easily see rolled up information about requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests the bar represents.
Request Summary Pie Chart	Displays as a pie chart information allowing users to easily see rolled up information about requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests the bar represents.
SLA Exception Roll Up	Lists the open Requests triggering SLA exceptions. The Service Level Agreements are configured using Request Type rules. The Portlet displays the active SLAs related to a Demand, highlighting the violations in red.

Table A-4. Portfolio Management Portlets

Portfolio Management Portlets	Description
Current Portfolio Map Portlet	The Current Portfolio Map Portlet displays a configurable bubble chart representing the Projects and Assets currently active.
Portfolio by Category Portlet	The Portfolio by Category Portlet can be used to analyze aggregate financially-significant values of your Portfolio's contents, including Budget, Financial Benefit, NPV, and ROI.
Resource by Category Portlet	The Resource by Category Portlet allows users to perform a by-period comparison of resource requirements and availability in the Portfolio.
Total Budget Portlet	The Total Budget Portlet shows the total budget each scenario in a specified Scenario Comparison will consume per period. The Portlet also displays the total budget available, if one is specified in the Scenario Comparison being referenced.
Total Resource Portlet	The Total Resource Portlet displays the total Resource demand per period of each scenario in a specified Scenario Comparison. The Portlet also displays the total available Resources, if specified in the selected Scenario Comparison.
Budget Summary Portlet	The Budget Summary Portlet provides a graph of the budget information for each scenario in a specified Scenario Comparison. Each graph displays Capital and Operating expense in a stacked bar chart. If there is a total available budget specified for the Scenario Comparison, it is displayed as the capacity line.
Cost Benefit Analysis Portlet	The Cost Benefit Analysis Portlet provides a graph illustrating the cost/benefit analysis for each scenario. The graph consists of a bar chart depicting the expected cost per period, as well as the expected benefit.
Budget by Asset Class Portlet	The Budget by Asset Class Portlet provides a graph illustrating the budget by Asset Class per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Asset Class) in each period.

Table A-4. Portfolio Management Portlets [continued]

Portfolio Management Portlets	Description
Budget by Project Class Portlet	The Budget by Project Class Portlet provides a graph illustrating the budget by Project Class per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Project Class) in each period.
Budget by Business Objective Portlet	The Budget by Business Objective Portlet provides a graph illustrating the budget by Business Objective per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Business Objective) in each period.

Table A-5. Program Portlets

Program Portlets	Description
Program Cost Summary	Displays an overview of the Project Cost Health. Cost overview summarizes labor, non-labor and total expenses set against baseline, planned and actual costs. The Earned Value Summary includes the Planned Value, Sched Variance, Earned Value, Cost Variance, Actual Cost, SPI and CPI.
Program Issue List	Displays a list of Program issues. This Portlet can be personalized to display Program issues based on Project, escalation level, priority, status or other Program related criteria. This enables users to display only the Programs that are relevant to their personal activities.
Program List	Displays general information about Programs, such as Program priority, Program state and issues. This Portlet can be personalized to display information based on Program Name or other Project related criteria. This enables users to focus on and display only the most relevant Program data.

Table A-5. Program Portlets [continued]

Program Portlets	Description
Program Project List	Displays the Project List of a Program. The Portlet is configured with default parameters to show all Project items for the Program so that the Portlet can be used without personalizing the Portlet. The Project items are sorted by the Project hierarchy and optionally, by name, resource, state, scheduled finish, and Project hierarchy.
Program Resource Request List	Displays a list of Program resource requests. This Portlet can be personalized to display Program resource requests based on, priority, status, assigned to and assigned to group. This enables users to display only the Resource requests that are relevant to their personal activities.
Program Risk List	Displays a list of Program risks. This Portlet can be personalized to display Program risks based on Project, escalation level, priority, probability, impact level or other Program related criteria. This enables users to display only the Program Risks that are relevant to their personal activities.
Program Scope Change List	Displays the List of a Program's Scope Changes. The sequence, Tasks and Project name are displayed, as well as the values for the Project and baseline pair selected of the four schedule fields. The four fields are: Scheduled Start, Scheduled Finish, Scheduled Duration and Scheduled Effort.

Table A-6. Project Management Portlets

Project Management Portlets	Description
My Tasks	Displays all Project Tasks currently assigned to the user having a scheduled finish date two weeks from the current date.This Portlet provides a critical view into the most pressing Tasks and nearing deadlines.

Table A-6. Project Management Portlets [continued]

Project Management Portlets	Description
Project Budget and Staffing Profile vs. Actuals	Displays a summary of Project performance relative to budgetary constraints. Values are for the entire Project to date. This Portlet is intended to provide dashboard-level oversight into the status of a group of Projects. The intended audience is PMO staff or external stakeholders. Budgeted values for cost and hours are drawn from a Budget, not from a Project baseline. Actuals for cost are gathered from the Budget. Actuals for hours are aggregated from Tasks assignments and Tasks actuals on the Project linked to the Budget. Percent complete is similarly drawn from the Project actuals.
Project Cost Summary	Displays a list of cost information for a Project if the Project has Financial Management setting enabled. This Portlet information is restricted if the user do not have the appropriate cost security.
Project Exception Detail	Displays information about the current Project's exceptions, stating the Violation, Tasks State, Start and Finish Dates, and the assigned Resource.
Project Exception Summary	Displays relevant exception information about the Project. Exception rules are configured by the Project Manager using the Project Management Workbench. The Portlet is configured with default parameters to show all exceptions for the Project so the Portlet can be used without personalizing the Portlet.
Project Gantt	Displays a Gantt chart for all Projects assigned to resources. The default values show Projects scheduled for the next two weeks.
Project List	Displays general information about Projects, such as how close they are to completion and their scheduled finish date. This Portlet can be personalized to display information based on Project Name or other Project related criteria. This enables users to focus on and display only the most relevant Project data.

Table A-6. Project Management Portlets [continued]

Project Management Portlets	Description
Project List (Expanded)	Displays general information about Projects, such as how close they are to completion and their scheduled start and finish date. This Portlet can be filtered for the same Project criteria as the Project List Portlet, but displays more detailed information on the Dashboard.
Project Milestones	Displays a list of milestones within a Project. The Portlet is configured with default parameters to show all milestones for the Project so the Portlet can be used without personalizing the Portlet.
Project Overview Gantt	Displays a Gantt chart in the Project Overview page.
Project References	Displays the References attached to the Project based on Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks. The Portlet is configured with default parameters to show all References for the Project so the Portlet can be used without personalizing the Portlet.
Project Related Actions	Displays links to related Assignments and Staffing Profiles.
Project Summary	Provides a quick status for the selected Project or Subproject, including information on the Project State, Percent Complete, Project Manager and Start and Finish Dates.
Project Summary Pie Chart	Displays a pie chart that rolls up a group of Projects and displays them grouped by their summary condition. Users have the option to either select a set of specific Projects and Subprojects, or filter by Department and/or Project Manager fields.
Resource Gantt	Displays a Gantt chart for all work items assigned to resources. Work items are differentiated by color, with Tasks remaining the same color as in the Project Gantt chart and requests being a different color. The default values show Tasks and requests scheduled for the next two weeks. The work items are labeled by having the resource displayed to the right of the work item. This is necessary if there are multiple resources or a resource group specified.

Table A-6. Project Management Portlets [continued]

Project Management Portlets	Description
Subprojects and Tasks Summary	Displays information about the current Project's Subprojects and Tasks: when there are exceptions, how close it is to completion, and the scheduled start/finish dates.

Table A-7. Project Management (Project Overview) Portlets

Project Overview Portlets	Description
Project Cost Summary	Displays a list of cost information for a Project if the Project has Financial Management setting enabled. This Portlet information is restricted if the user do not have the appropriate cost security.
Project Exception Detail	Displays information about the current Project's exceptions, stating the Violation, Tasks State, Start and Finish Dates, and the assigned Resource.
Project Exception Summary	Displays relevant exception information about the Project. Exception rules are configured by the Project Manager using the Project Management Workbench. The Portlet is configured with default parameters to show all exceptions for the Project so that the Portlet can be used without personalizing the Portlet.
Project Milestones	Displays a list of milestones within a Project. The Portlet is configured with default parameters to show all milestones for the Project so that the Portlet can be used without personalizing the Portlet.
Project Overview Gantt	Displays a Gantt chart in the Project Overview page.
Project References	Displays the References that are attached to the Project based on Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks. The Portlet is configured with default parameters to show all References for the Project so that the Portlet can be used without personalizing the Portlet.

Table A-7. Project Management (Project Overview) Portlets [continued]

Project Overview Portlets	Description
Project Related Actions	Displays links to related Assignments and Staffing Profiles.
Project Summary	Provides a quick status for the selected Project or Subproject, including information on the Project State, Percent Complete, Project Manager and Start and Finish Dates.
Subprojects and Tasks Summary	Displays information about the current Project's Subprojects and Tasks: when there are exceptions, how close it is to completion, and the scheduled start/finish dates.

Table A-8. Resource Management Portlets

Resource Management Portlets	Description
Analyze Assignment Load	Compares capacity (resource calendars X resource workload capacity) to assignments (requests, Tasks, and staffing profiles marked “treat as assignments.” It is used to assess upcoming load on resources, in support of manual load leveling.
Analyze Resource Pools	Analyzes the resource pools. This Portlet compares capacity (active resource pools) to load (lines on active staffing profiles drawing from these resource pools). The Portlet is used to assess planned load on resource pools, in support of strategic resource planning.
Compare Project and Staffing Profile	Compares a Project to the staffing profile. This Portlet compares capacity (as the set of active staffing profiles for a Project) to assignments within the Project. The Portlet is used either by the Project manager or by resource managers in charge of planning staffing profiles to monitor compliance of the project plan and actuals to organizationally agreed staffing levels for the Project.
Current Resource Load by Organization	Displays the current resource load by Organization. Organization unit or skill name is a link to the related detail page. Note that to support breakdowns it is desirable to sort the list by organization hierarchy structure.

Table A-8. Resource Management Portlets [continued]

Resource Management Portlets	Description
Current Resource Load By Skill	Displays the current resource load by skills. This Portlet displays a snapshot of current load on a set of resources, broken down by the skill booked on the work item. Note that when skill is not specified during the booking process, it will default to the resource's primary skill.
Resource Assignment	Displays a list of assigned resources and their related assignments and statues including: Open Tasks, Task Effort, Open Reqs and Open Pkgs.
Resource Pool List	Displays a list of resource pools. Listings include following columns: Resource Pool, Resource Pool is for, Status, Active, Start and Finish. Columns are configurable.
Staffing Profile List	Displays staffing profiles. This Portlet allows flexible filtering so the desired set of staffing profiles can be drawn out and presented. Filters include: Specific staffing profile name(s), department, workload type, status (multi-select), start date after, finish date before, and total hours above.

Table A-9. Time Management Portlets

Time Management Portlets	Description
TMG - Actuals for Direct Reports	Displays the total time entered by all the direct reports for a specific manager or set of managers.
TMG - My Time Sheets	Displays the Time Sheets for the user during the last 10 time periods.
TMG - My Work Items	Displays all Work Items created by or assigned to the current user. This Portlet provides a critical view into the most pressing Work Items and nearing deadlines.

Table A-9. Time Management Portlets [continued]

Time Management Portlets	Description
TMG - Resource Group Total by Work Item	Displays a snapshot of current load on a set of teams. Teams are organization units. By selecting both a particular organization unit and also the organization units beneath this unit, it is possible to display a departmental summary and team breakdown. This Portlet is intended to provide dashboard-level summary of upcoming load. The intended audience is PMO staff or middle managers (responsible for coordinating several teams).
TMG - Resource Group Totals	Displays the time charged by Resource Groups, summarizing the totals of all the Resources in those groups, letting the user see the level of activity (by time) in the current and previous period for these groups.
TMG - Resource Totals	Displays the time charged by a set of resources, letting the user see the level of activity (by time) in the current and previous period for these users.
TMG - Total Hrs by Work Item	Displays detail information on the time allocated to and the time charged for specific Work Items. It shouldn't be used to display information for all Work Items but for a specific set based on filter criteria.
TMG - Work Allocation Details	Displays summary information on the defined work allocations. It is especially helpful to see which allocations are close to being used up or actually are over budget.
TMG - Work Item Set Budgets and Actuals	Displays summary information at the Work Item Set level. This Portlet is useful to get a snapshot of which projects or types of activities the users are spending the most time on as well as where the most time is budgeted. Values are for the entire project to date (as opposed to period-by-period). This Portlet is intended to provide dashboard-level oversight into the status of a group of projects. The intended audience is PMO staff or external stakeholders. For this Portlet, the budgeted values for cost and hours are drawn from a Budget, not from a project baseline. Actuals for costs are gathered from the Budget.

Appendix B

Field Formats

Pages in Mercury IT Governance Center feature a number of standard interface components. This appendix summarizes these components.

This appendix discusses the following topics:

- *Component Types*
- *Using Auto-Complete Lists*
- *Using Table Components*

Component Types

Table B-1 lists the standard interface components found on the Dashboard.

Table B-1. Component Types

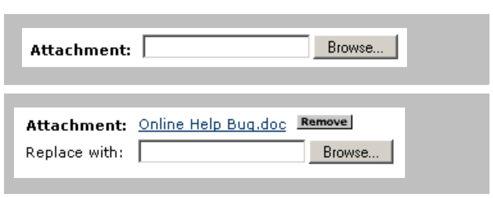
Component Type	Example	Description
Attachment		Field for indicating file attachments. Comes with buttons for locating files for previewing the contents of a selected file. When no file is attached, the Attachment field consists of the text field and the Browse button. Once an attachment is added and saved, the name of the attachment and a Remove button are added.
Auto-complete list		Field showing a list of choices. See *"Using Auto-Complete Lists"* on page 53 for additional information.

Table B-1. Component Types [continued]

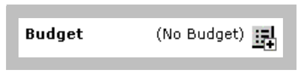
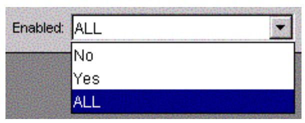
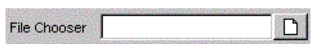
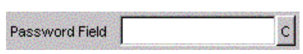
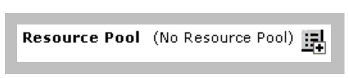
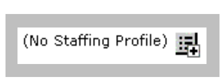
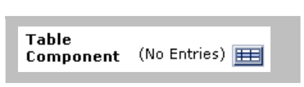
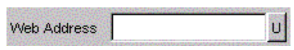
Component Type	Example	Description
Budget		Field to view, edit or create Budgets associated with a Request or Project.
Date Field		A field supporting s a variety of date and time formats.
Directory Chooser		Text entry field for entering a directory name. Pressing the icon opens a browser window to the specified web address.
Drop down list		Field showing a column of choices.
File Chooser		Text entry field for entering a filename. Pressing the icon opens a browser window to the specified web address.
Password field		Field for capturing and storing passwords.
Radio Button		Field providing a Yes/No input.
Resource Pool		Field to view, edit or create Resource Pools associated with a Request or Project.
Staffing Profile		Field to view, edit or create Staffing Profiles associated with a Request or Project.
Table Component		Used to enter multiple records into a single component. The table component can be configured to include multiple columns of varied data types. See *"Using Table Components"* on page 65 for more information.

Table B-1. Component Types [continued]

Component Type	Example	Description
Text Area		Text entry field that can span multiple lines.
Text Field		Text entry fields displayed on a single line.
Web Address (URL)		Text entry field for entering a URL. Pressing the U button opens a browser window to the specified web address.

Using Auto-Complete Lists

Auto-complete fields contain a list of values. The values listed are the valid values for the field, such as the enabled Security Groups for the Assigned Groups field. Clicking the auto-complete list icon ( ) opens a Select page where the user can choose one or many items from the list, depending on the configuration of the field. The auto-complete field also features an automatic value matching and completion function, to help you find the correct value.

If you type a character or string into the field and click the **Tab** key, the field automatically:

- Completes the entry if the character or string only matches one value in the list
- Opens the Select page and displays only the values matching the character or string.

If you enter text in the auto-complete field and then click the auto-complete icon, the Select page returns values matching the entry in the auto-complete field (see *Figure B-1*).

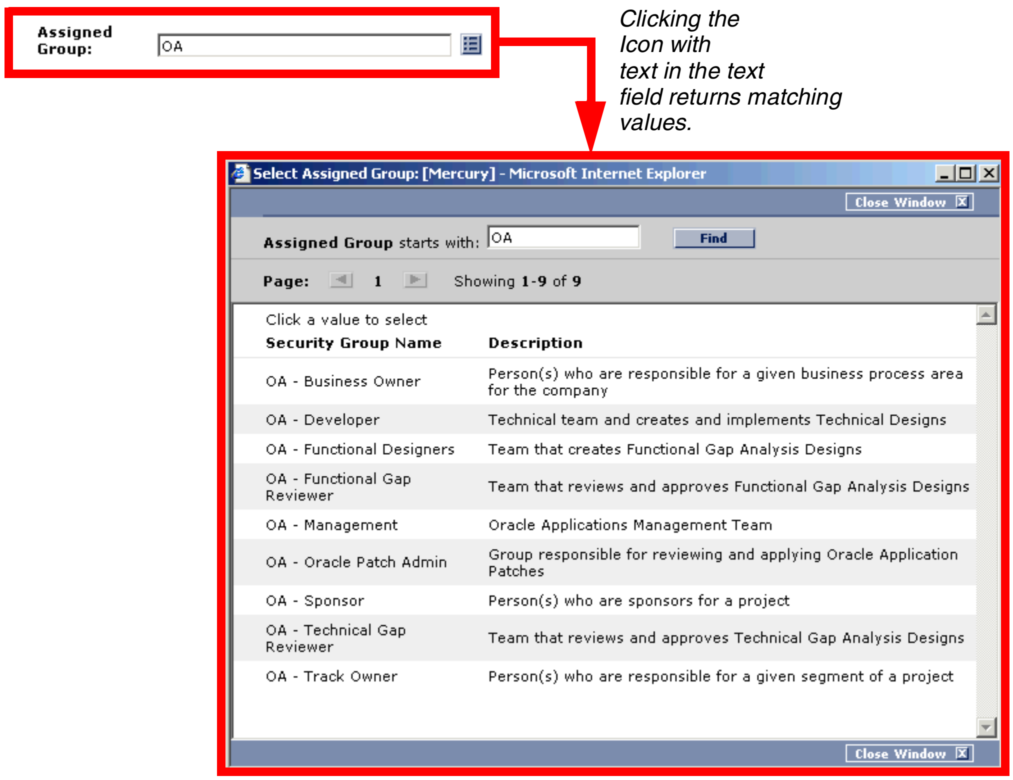


Figure B-1 Clicking an Auto-Complete Icon - With Text

If you do not enter text in the auto-complete field and then click the auto-complete icon, the Select page returns a Select page empty of values. Clicking **show all** returns all valid values (see *Figure B-2*).

Note

If you do not enter text in the auto-complete field configured as a short list, the Select page returns all available values.

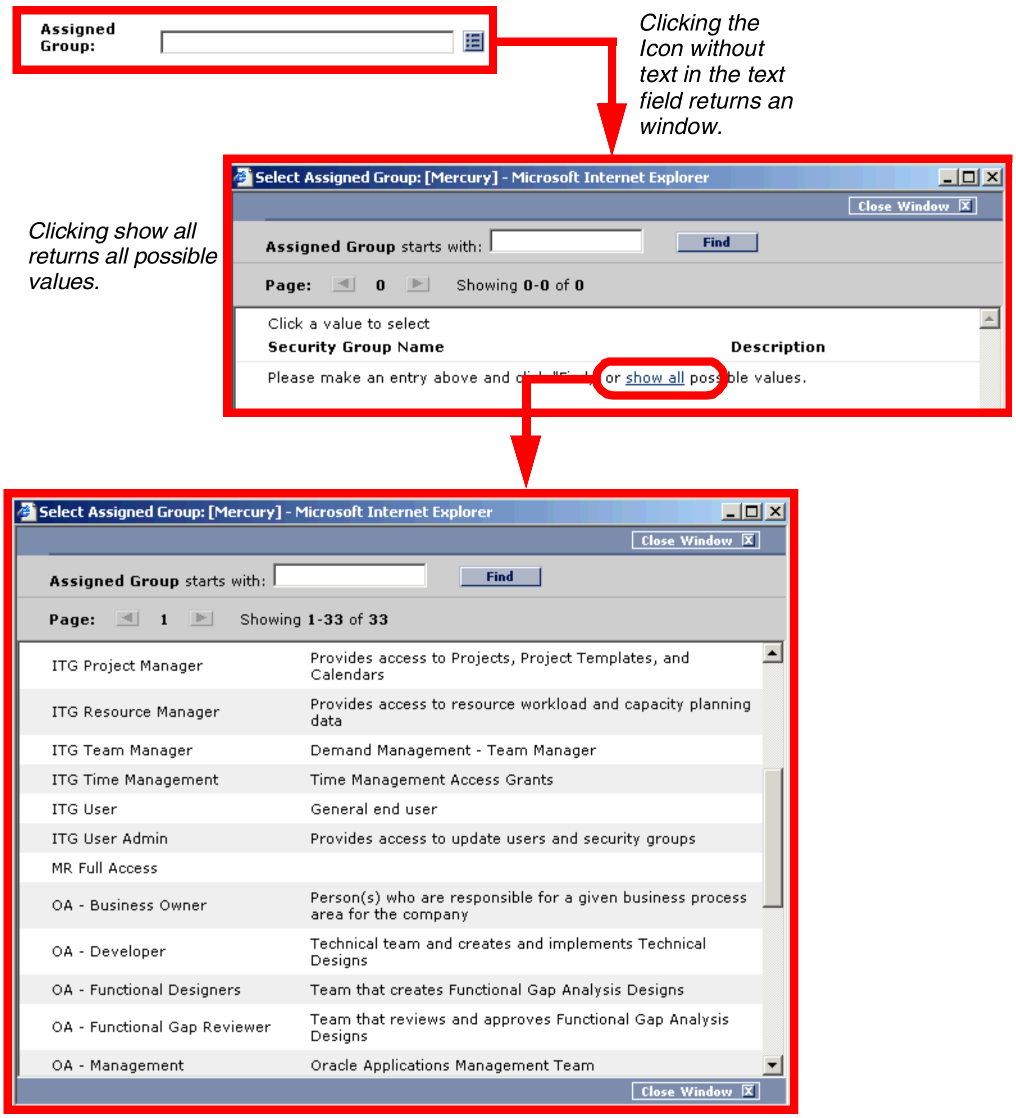


Figure B-2 Clicking an Auto-Complete Icon - No Text

Some auto-complete fields can accepts multiple entries separated by a semicolon (;). The field will automatically complete all exact matches. If some of the entries do not have exact matches, the Select page will open and display both the items that were matched and the items that did not match. This is shown in *Figure B-3*.

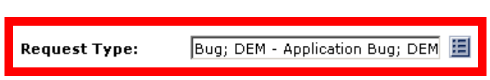


Figure B-3 Auto-complete Field with Multiple Entries

Auto-Complete Select Pages

Depending on how the field is configured, you will see one of the following Select pages:

- Single select page for a short list of values, see *Figure B-4*.
- Multi-select page for a short list of values, see *Figure B-5*
- Single select page for a long list of values, see *Figure B-6*
- Multi-select page for a long list of values, see *Figure B-7*
- Select page for selecting one or more Mercury ITG Users, see *Figure B-8*

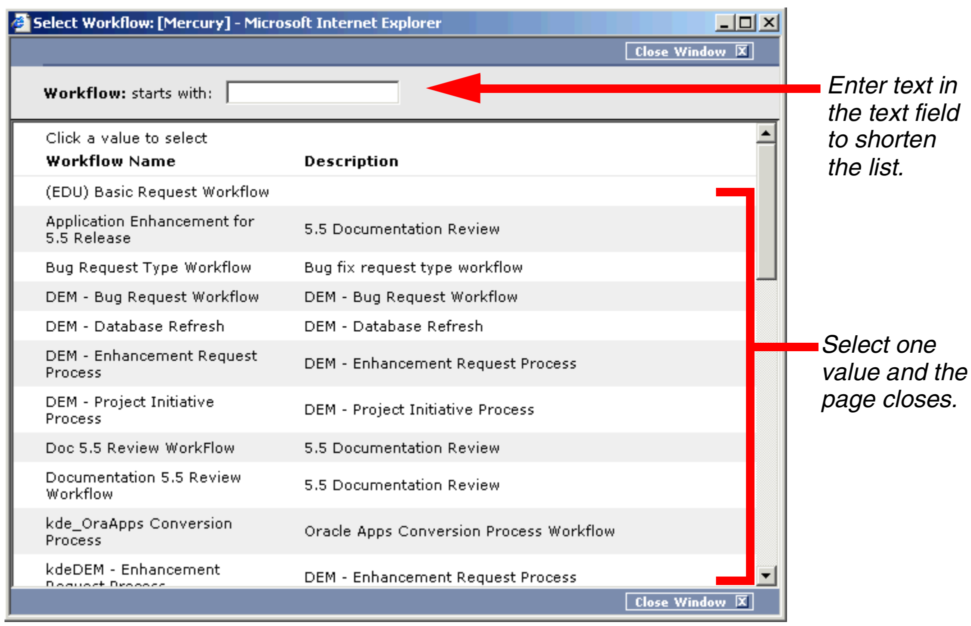


Figure B-4 Single Select Page for a Short List of Values

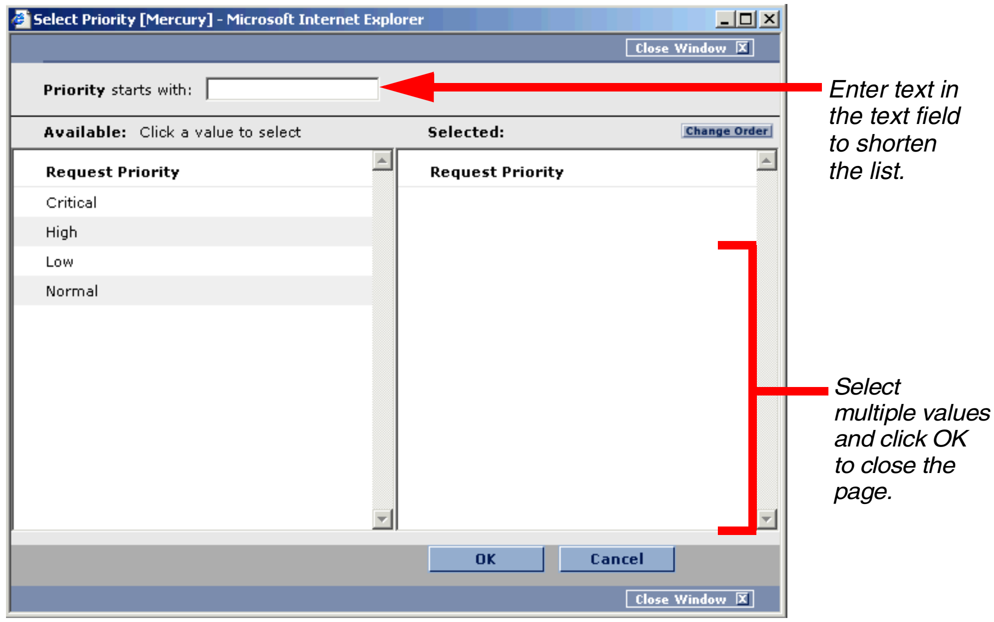


Figure B-5 Multi-Select Page for a Short List of Values

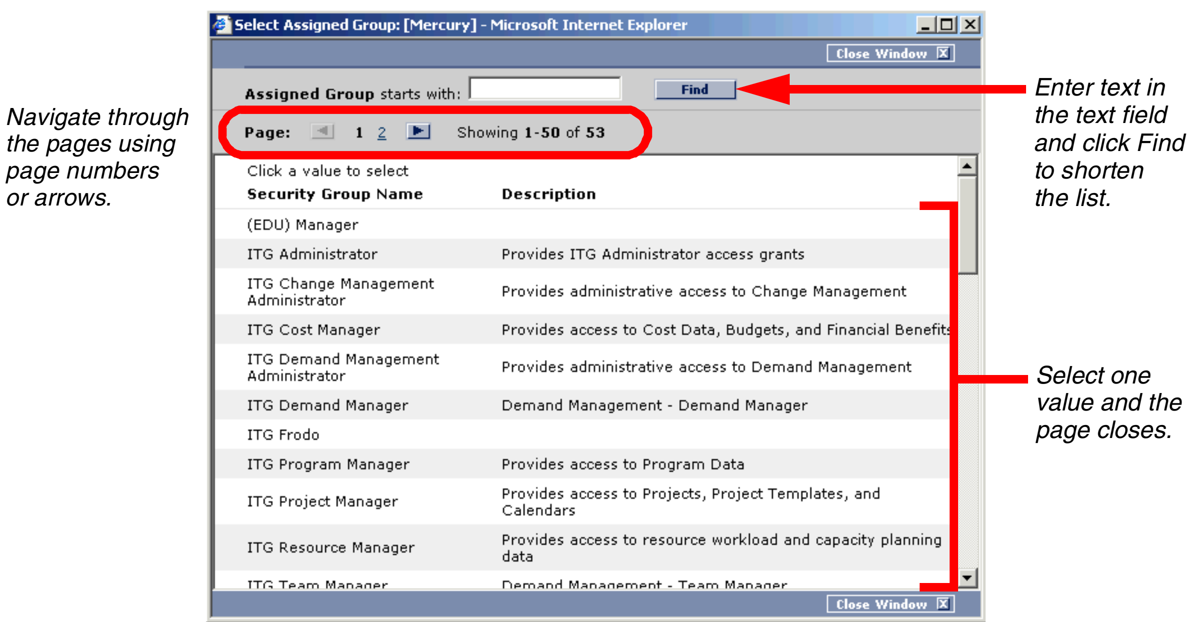


Figure B-6 Single Select Page for a Long List of Values

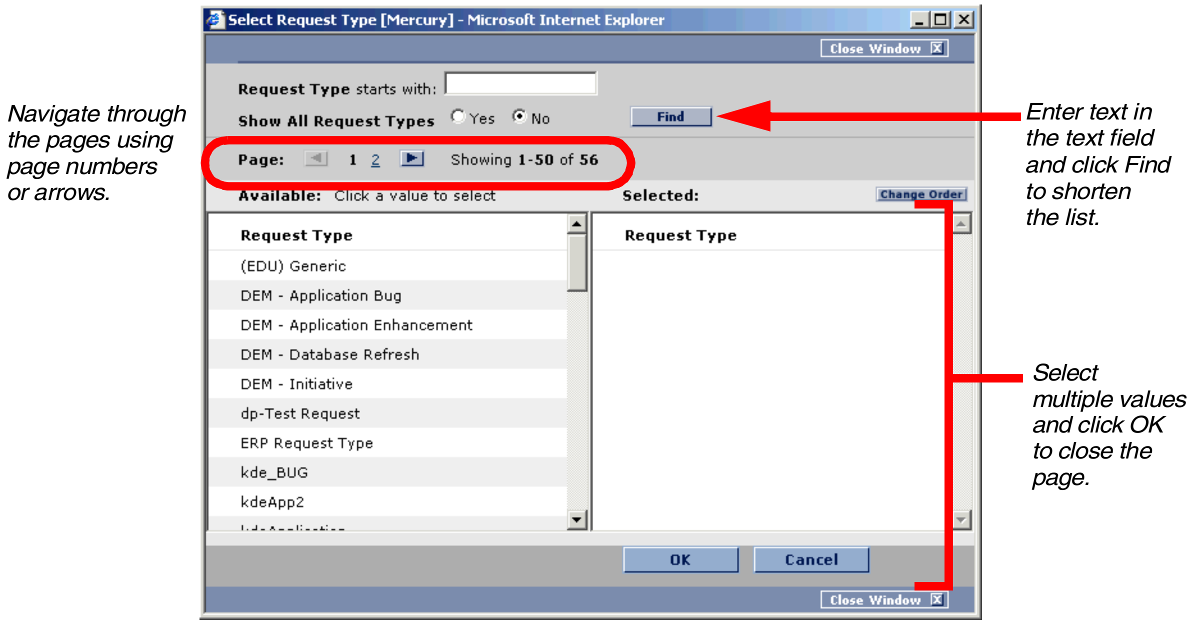


Figure B-7 Multi-Select Page for a Long List of Values

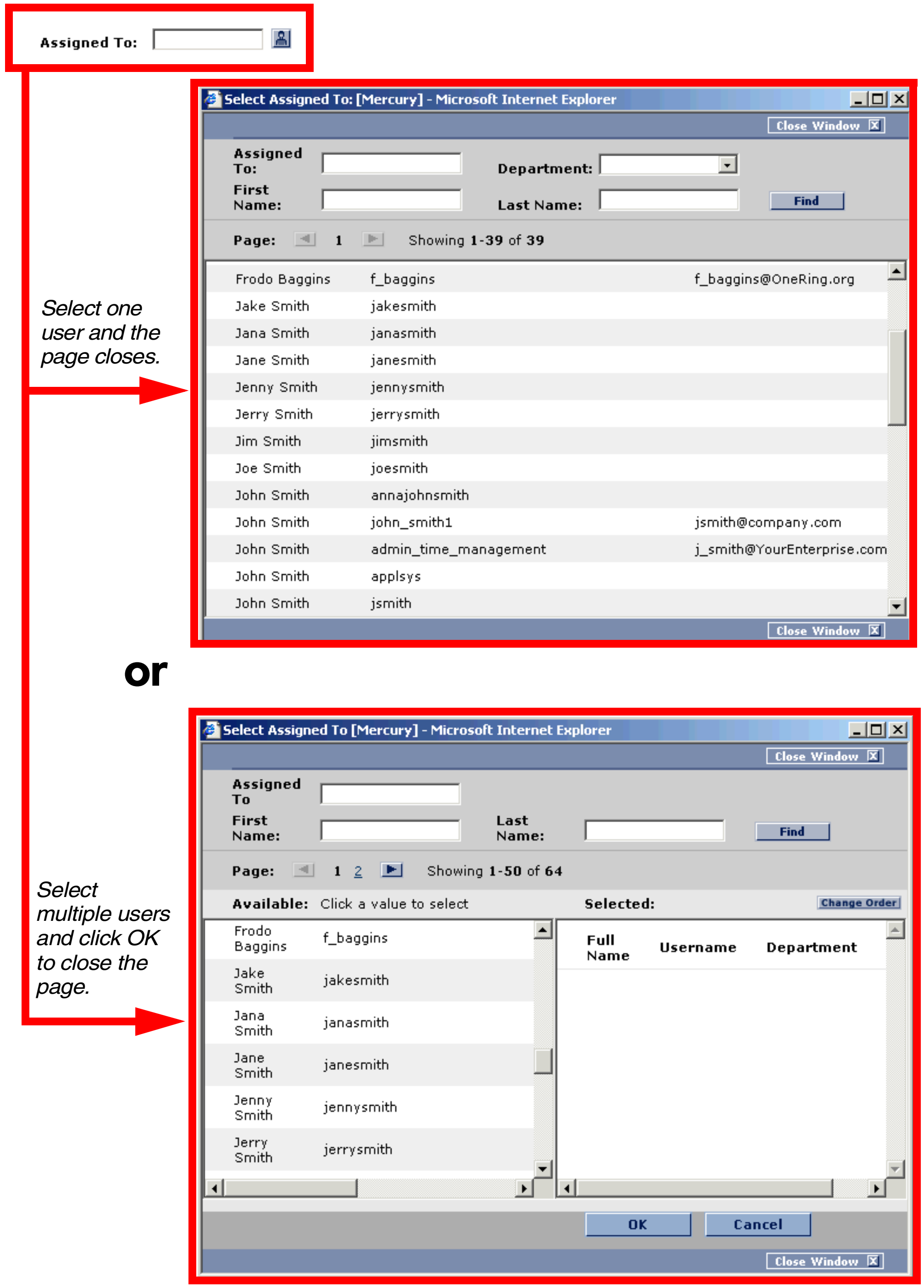


Figure B-8 Select Page for Selecting One or More Mercury ITG Users

Finding Items in the Auto-Complete List

The Select page can potentially contain a long list of values. This page, therefore, includes the following features to help you to quickly find the desired list item:

- Text matching and dynamic list updates for short lists:
  You can search for list items that "start with" or "contain" text that you enter into the field on the Select page. Users can shorten the list in the Select page by entering text into the search field at the top of the window. As each character is added, non-matching items are dynamically removed. Deleting characters dynamically adds matching items to the list. If text was entered in the Auto-Complete text field before the Select page was opened, the text is displayed in the search field.

- Text matching and list updates for long lists:
  Similar to the matching performed in the short list, you can search for list items that match text that you enter into the field on the Select page. Enter a character or text string and click **Find**. The list will be filtered to only matching items. For these searches, you can use a wildcard search by typing a % before the text. This will find matches for items that contain the text.

- Paging for long lists:
  For long lists, the Select page displays the list of entities in a paging mode. Users can navigate through the pages using page numbers or arrow buttons. *Figure B-9* displays the Select page in a paging mode.

Figure B-9 Paging for Long Lists

- Additional Search Fields on the Search Page:
  Auto-complete fields can include additional filter fields on the auto-complete Select page. In the Select page, users can limit the returned values by filtering by one of the fields. Additional filter criteria is automatically added to system Validations for user auto-completes. In *Figure B-10*, Department and Location are additional search filter fields.

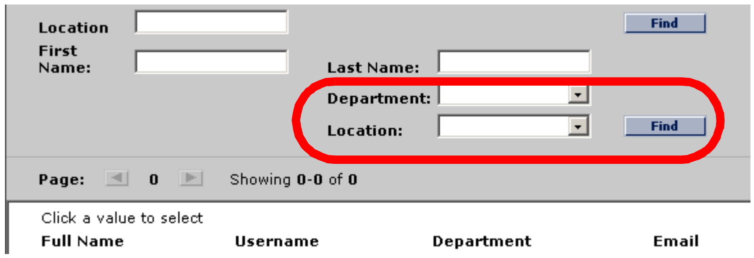


Figure B-10 Additional Filter Fields

- Selecting Multiple Items
  When an auto-complete field is configured to accept multiple values, the Select page displays an Available area and a Selected area. Click an item in one area to move it to the other area. Clicking **OK** adds the entities in the Selected area to the auto-complete list. *Figure B-11* illustrates the multiple selection paging mode Select page.

  Within the Select page, you can highlight multiple items to move them into the Selected area. Press and hold the **Shift**-key and then select a range of adjacent items. When you release the **Shift**-key, the items will be moved into the other list. Similarly, you can use the **Ctrl**-key to select multiple non-adjacent items.

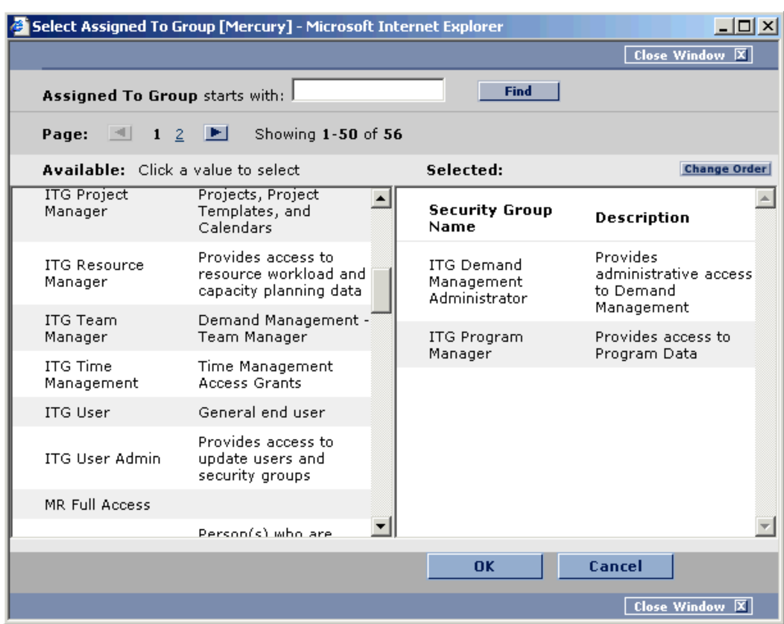


Figure B-11 Multiple Selected Values

Notes on the User Auto-Completes

The following is a list of notes concerning auto-complete field behavior.

- User auto-complete fields include a few additional features to help locate specific users based on their username, first name, last name, or full name. User auto-completes are denoted by a special user icon ( ) rather than the standard auto-complete icon ( ). The user auto-complete field includes the following features:

- Comprehensive name matching on the auto-complete field. The user auto-complete field accepts and resolves the following name formats: username, first name, last name, and full name (see *Figure B-12*). As with all auto-complete fields, partial matching is supported. For example, each of the following entries will find the user John Smith:

  - jsmith
  - j smith
  - john
  - smith
  - smith, john
  - smi, jo

Within the Select page, the primary search field (which shared a name with the auto-complete field name) can accept either the username or full name. In *Figure B-12*, this is the Assigned To field.

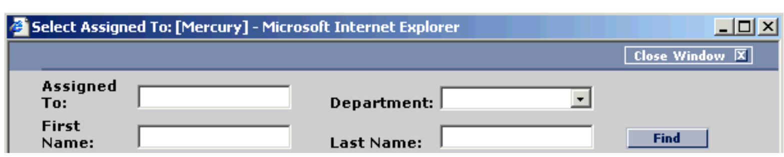


Figure B-12 Select Page for Mercury ITG Users

- If you click on the field without first entering any text, the Select page will open without any displayed values. You then need to click on the **Show All** link to display the list. You can also enter text into the search field and then click **Find**.

Note

If you do not enter text in the auto-complete field configured as a short list, the Select page returns all available values.

- Use the **Change Order** button to change the order of the entities in the Selected area.
- All auto-complete fields respect a wildcard search. You can use a wildcard search by typing a **%** before the text. This will find matches for all items that contain the text. This feature, however, is not available within every Select page. For the short list, dynamic Select pages, it will execute whatever behavior is configured, such as “contains” or "starts with". Wildcard searches are, however, supported on the long-list Select pages. On these pages, enter the wildcard search criteria and click **Find**.

Example

For example, enter **%jo** and click **Find**. The following results could be returned:

John Smith, Jon Smythe, Jonah Lee, Brandon Johnson, and William Cajon.

Useful Auto-Complete Keyboard Shortcuts

Auto-complete lists can be manipulated from the keyboard as well as the buttons in the auto-complete Select page. The applicable keyboard shortcuts depend on the configured auto-complete list. The following is a list the possible auto-complete field configurations and their associated table.

- Short list keyboard shortcuts, see *Table B-2*
- Long list keyboard shortcuts, see *Table B-3*
- Single select list keyboard shortcuts, see *Table B-4*
- Multi-select list keyboard shortcuts, see *Table B-5*

Table B-2. Short List Keyboard Shortcuts

Keystroke	Action
Down Arrow	Moves the cursor to the next Available value. When the cursor is in the Auto-Complete text field, the first Available value is highlighted.

Table B-2. Short List Keyboard Shortcuts [continued]

Keystroke	Action
Up Arrow	Moves the cursor to the previous Available value. If the first Available value is highlighted, the cursor moves to the Auto-Complete text field.
Enter	Selects the highlighted value. If the cursor is in the Auto-Complete text field, no action is taken.
Esc	Closes the window without selecting a value.

Table B-3. Long List Keyboard Shortcuts

Keystroke	Action
Down Arrow	Moves the cursor to the next Available value. When the cursor is in the Auto-Complete text field, the first Available value is highlighted.
Up Arrow	Moves the cursor to the previous Available value. If the first Available value is highlighted, the cursor moves to the Auto-Complete text field.
Right Arrow	When an Available value is highlighted, the cursor move to the next page of Available values.
Left Arrow	When an Available value is highlighted, the cursor move to the previous page of Available values.
Enter	Executes a find based on the criteria of the Auto-Complete text field and any other filter fields. After the find, the cursor returns to the Auto-Complete text field.
Esc	Closes the window without selecting a value.
Tab	Moves the cursor to the next search field. If the cursor is in the last search field, the cursor moves to the Find button.

Table B-4. Single Select List Keyboard Shortcuts

Keystroke	Action
Enter	Selects the highlighted Available value and closes the window.
Space Bar	Selects the highlighted Available value and closes the window.

Table B-5. Multi-Select List Keyboard Shortcuts

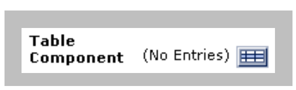
Keystroke	Action
Tab	Toggles the cursor (highlighted value) between the Available section and Selected section.
Enter	Selects the highlighted Available value and closes the window. If there is a value in the elected section, the highlighted value is not selected.
Space Bar	The highlighted Available value is moved to the Selected section. Conversely, a highlighted Selected value is moved to the Available section.

Using Table Components

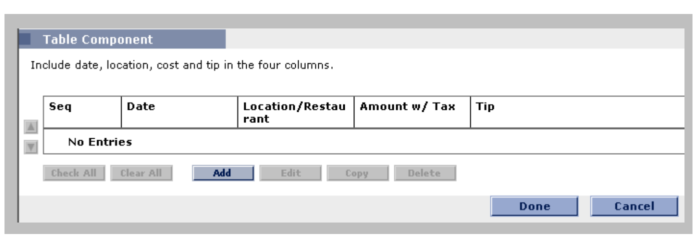
Table components are used to enter multiple records into a single component. The table component can be configured to include multiple columns of varied data types.

To use the Table Component:

1. Click the **Table** icon.



The Table window opens.

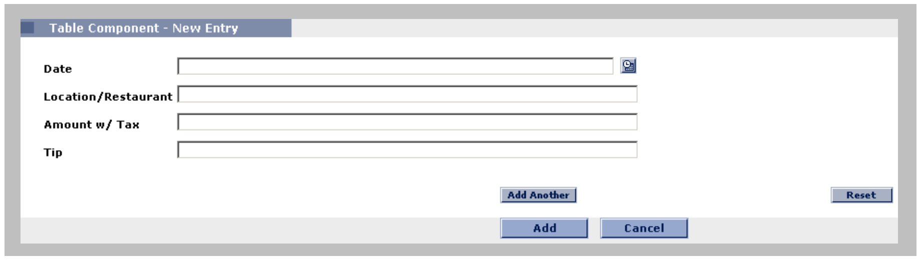


2. Click **Add** to add a row to the columns.

The add row window opens.

3. Enter data in the available fields.

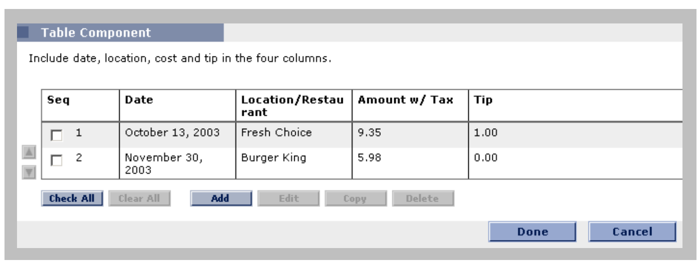
   The table component are configured to include columns of varied data types.



4. Click **Add Another** to add another row to the columns.

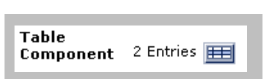
5. Click **Add** to return to the Table window.

   The Table window opens. All of the added rows are displayed.



6. Click **Done**.

   The Table window closes and the original window opens. The entries are recorded next to the **Table** icon.



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