Mercury IT Governance Center™

Getting Started

Version: 6.0

MERCURY™

Mercury
379 North Whisman Road
Mountain View, CA 94043
Tel: (650) 603-5200
Toll Free: (800) TEST-911
Customer Support: (877) TEST-HLP
Fax: (650) 603-5300

If you have any comments or suggestions regarding this document, please send email to documentation@mercury.com.

Publication Number: ITG60GettingStarted1104A

Table of Contents

List of Figures vii

List of Tables ix

Chapter 1: Introduction 11

About This Document 12

Who Should Read This Document 14

Related Documents 14

Overview of the Standard Interface 15
- Dashboard Pages 16
- Portlets 18
- Accessing Mercury IT Governance Center 19
- Using Mercury IT Governance Center 20
  - Executive Scenario: Managing Your Portfolio of Projects 20
  - Management Scenario: Scheduling Tasks and Resources 21
  - User Scenario: Completing Tasks and Requests 23

After This Document 25

Chapter 2: Using the Standard Interface 31

Logging On and Off Mercury IT Governance Center 32
- Logging On to Mercury IT Governance Center 32
- Logging Off Mercury IT Governance Center 34

Expanding and Collapsing Menus 34

Hiding and Displaying the Menu Bar 35

Creating Requests, Packages, and Other Entities 36

Searching for Requests, Packages, and Other Entities 39

Running New Searches 39
Running Saved Searches 39
Creating Saved Searches 40
Managing Saved Searches 41
Managing Saved Search Categories 42
Running Reports 44
Running New Reports 44
Opening Existing Reports 45
Changing Your Settings 46
Changing Your Password 46
Setting Maximized Views for Portlets 47
Setting Cost Displays 48
Viewing Product Information and Online Documentation 49
Accessing Documentation 49
Viewing Version and User Access Information 50
Using the Dashboard 51
Opening Dashboard Pages 51
Setting Portlet Views 51
Arranging Data in List Portlets 53
Drilling Down from Portlets 54
Exporting Data to Excel Spreadsheets 56
About Excel Exports 57
Personalizing Dashboards 58
Adding Dashboard Pages 58
Moving and Deleting Dashboard Pages 60
Renaming Dashboard Pages 61
Setting Refresh Rates for Dashboard Pages 62
Adding Portlets to Dashboard Pages 63
Copying and Moving Portlets on Dashboard Pages 65
Personalizing Portlets 66
Deleting Portlets 66
Changing the Size of Portlets 67
Configuring Portlets 68

Chapter 3: Using the Workbench 71

Overview of the Workbench 72
Opening and Closing the Workbench 74
Searching for Entities 76
Saved Queries 76
Creating Saved Queries 76
Using Saved Queries 77
Deleting Saved Queries 77
Case Sensitivity and Using Wildcards 78

Advanced Queries 79
Selecting Configuration Entities..... 82
Opening, Deleting, and Copying Entities..... 84
Creating New Entities 84
Navigating Inside Workbenches..... 85

Index 87

List of Figures

Figure 1-1 Mercury IT Governance Center standard interface 12
Figure 1-2 Mercury IT Governance Workbench 13
Figure 1-3 Mercury IT Governance Center standard interface 15
Figure 1-4 Typical Dashboard page 16
Figure 1-5 Typical portlets 18
Figure 1-6 Executive scenario 21
Figure 1-7 Management scenario 22
Figure 1-8 User scenario 24
Figure 1-9 User scenario 25
Figure 2-1 Logging off the standard interface 34
Figure 2-2 Expand All and Collapse All buttons 35
Figure 2-3 Hiding the menu bar 35
Figure 2-4 Displaying the menu bar 35
Figure 2-5 Dashboard page tab 51
Figure 2-6 Normal and minimized views of portlets 52
Figure 2-7 Portlet maximize icons 52
Figure 2-8 Portlet maximized view 53
Figure 2-9 Sort icon 54
Figure 2-10 Drilling down from a list portlet 55
Figure 2-11 Drilling down from a chart portlet 56
Figure 2-12 Exporting data to Excel 57
Figure 3-1 Mercury IT Governance Workbench 72
Figure 3-2 Mercury IT Governance Workbench 73
Figure 3-3 Package Workbench 79

Figure 3-4 Results tab 82
Figure 3-5 Navigating between multiple open detail windows 85

List of Tables

Table 1-1 Roles, processes, and documents ... 26
Table 3-1 Boolean operators ... 81

Chapter 1 Introduction

In This Chapter:

- *About This Document*
- *Who Should Read This Document*
- *Related Documents*
- *Overview of the Standard Interface*
  - *Dashboard Pages*
  - *Accessing Mercury IT Governance Center*
  - *Portlets*
  - *Using Mercury IT Governance Center*
- *After This Document*

About This Document

Welcome to Mercury IT Governance Center™!

This document provides the basic details you need to navigate Mercury IT Governance Center. The document also describes how to make changes to the standard interface, perform common tasks, and personalize the standard interface to make it work best for you. The document also introduces you to the Mercury IT Governance Workbench. For the most part, only advanced users, configurators, and application administrators use the Workbench. Some common tasks, such as those involving projects and packages, require using the Workbench.

Most IT Governance Center users work in the standard interface. The standard interface opens in a Web browser and offers you a customized view into Mercury IT Governance Center. From the standard interface, you can run reports, create requests, and search for packages, among other things. Most importantly, you view and use the Mercury IT Governance Dashboard™. The Dashboard is a real-time view into your Mercury IT Governance Center system. Using portlets, you can view almost anything, from the status of requests assigned to you, to comparisons between current projects and staffing profiles. *Figure 1-1* shows an example of the standard interface.

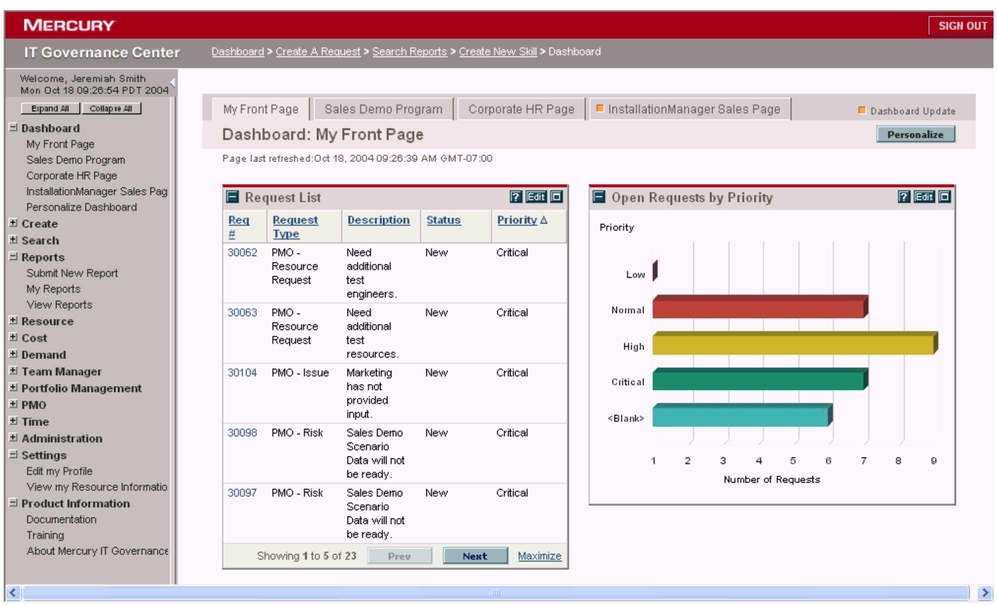


Figure 1-1. Mercury IT Governance Center standard interface

In addition to the standard interface, some users need to use the Mercury IT Governance Workbench to accomplish certain tasks. Unlike the standard interface, which opens in a Web browser, the Workbench opens in its own window. Designed for more advanced users, the Workbench is where much of the Mercury IT Governance Center is configured. Configurators can use the Workbench to define workflows, create request types, set up automatic notifications, and a host of other tasks and procedures. *Figure 1-2* shows an example of the Workbench.

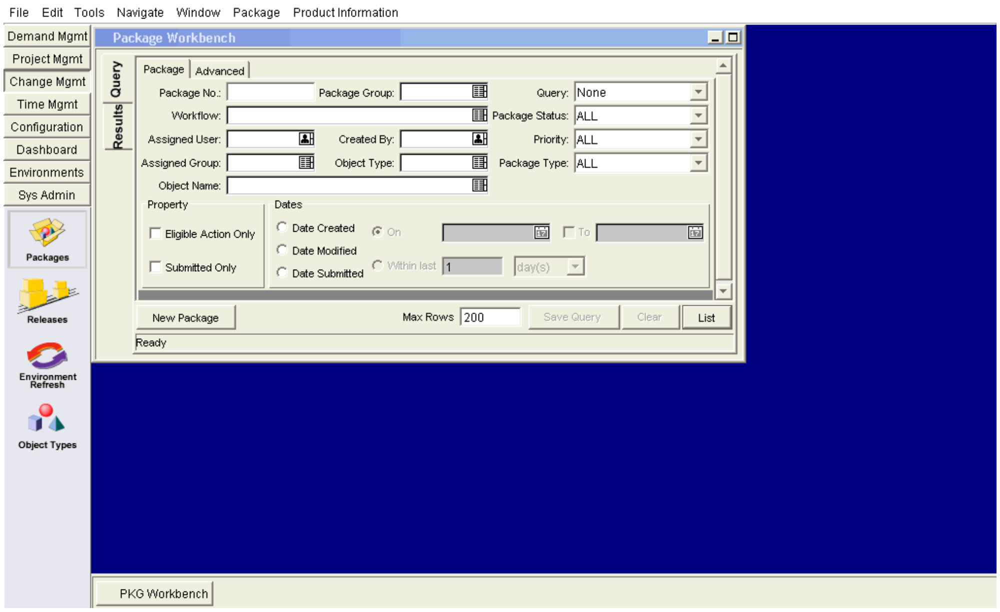


Figure 1-2. Mercury IT Governance Workbench

The following chapters describe the standard interface and the Workbench in greater detail. Each chapter title is followed by a brief summary of the information covered.

- Chapter 1, *Introduction*, on page 11

  This chapter, which contains information about this document and related documents, as well as an overview of the standard interface and the Workbench.

- Chapter 2, *Using the Standard Interface*, on page 31

  Describes how to run reports, create requests, search for packages, and accomplish other tasks. Also explains how to personalize the Dashboard and portlets. Whether you are an administrative assistant, engineer, manager, accountant, or programmer, you can personalize the Dashboard to suit your needs.

- Chapter 3, *Using the Workbench,* on page 71

  Unlike the standard interface, which opens in a Web browser, the Workbench opens in its own window. Some users access Workbench windows by performing specific tasks in the standard interface. These tasks include such things as creating packages or projects. More advanced users access the Workbench through the **Administration** menu in the standard interface. This chapter is for both types of users.

Who Should Read This Document

Anyone new to Mercury IT Governance Center should read this document. The document provides information for end users, configurators, and system administrators.

> Note: Installation and system administration issues are covered in the *System Administration Guide and Reference*.

Related Documents

Here are some related documents you should know about:

- For information about Mercury IT Governance Center documents and how to access them, see the *Guide to Documentation*.
- For information about terms and concepts, see the *Key Concepts* document.
- For information about reports, see the *Reports Guide and Reference.*

Overview of the Standard Interface

The Mercury IT Governance Center standard interface opens in a Web browser and offers you a customized view into Mercury IT Governance Center. From the standard interface, you can run reports, create requests, search for packages, and accomplish many other tasks. *Figure 1-3* shows the standard interface.

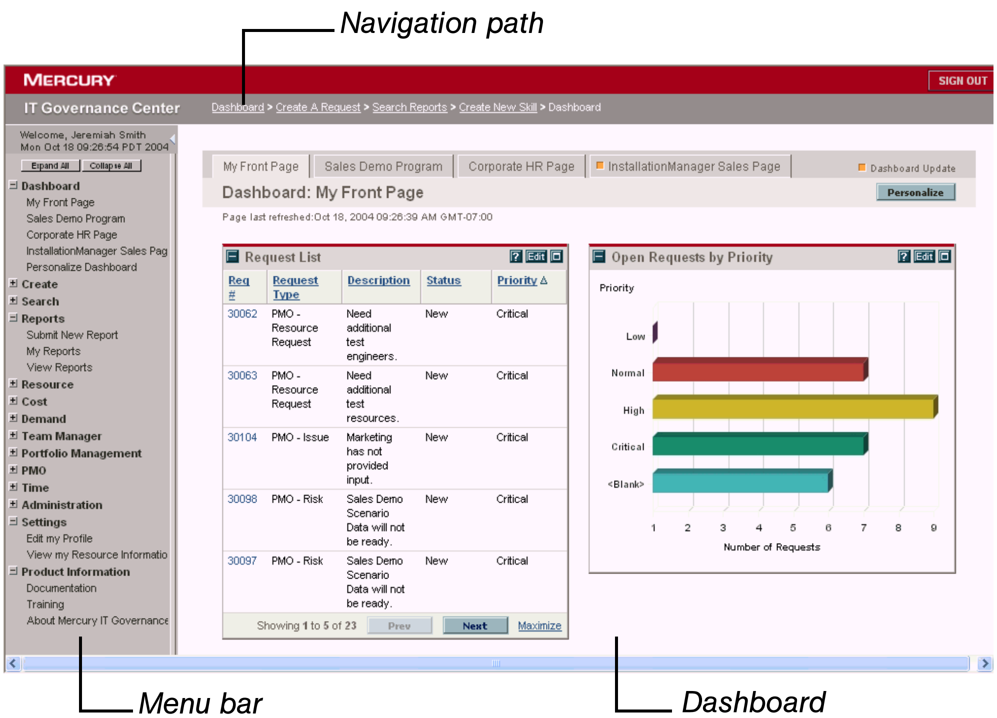


Figure 1-3. Mercury IT Governance Center standard interface

The Mercury IT Governance Center has the following components (see *Figure 1-3*):

- **Dashboard.** The Dashboard is at the heart of the standard interface. Using the Dashboard, you can obtain accurate, up-to-the-minute status on your projects and deliverables. With the Mercury IT Governance Dashboard, project teams always know exactly where they stand. Managers gain real-time insight into progress and problems in projects under their purview. Executives can view all initiatives from an IT value perspective at a high level, ensuring alignment with the company's overall strategic direction.

- **Navigation path.** Above the Dashboard is the navigation path. The navigation path lists the pages opened during the current Dashboard session. Users can access previously visited pages by selecting entries on the navigation path.
- **Menu bar.** The menu bar presents a hierarchical organization of menus, submenus, and menu items. Menus and submenus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. Some links, like **Create > Package** and **Create > Project**, open windows in the Workbench.

Dashboard Pages

Dashboard pages are a way of organizing application data. One Dashboard page can be devoted to project information while another can be reserved for a Mercury IT Governance Center product, such as Mercury Demand Management™ or Mercury Portfolio Management™. How you organize your data is entirely up to you.

At the top of each Dashboard page is a tab. The tab is used to identify and access a Dashboard page. *Figure 1-4* shows a Dashboard with several Dashboard pages.

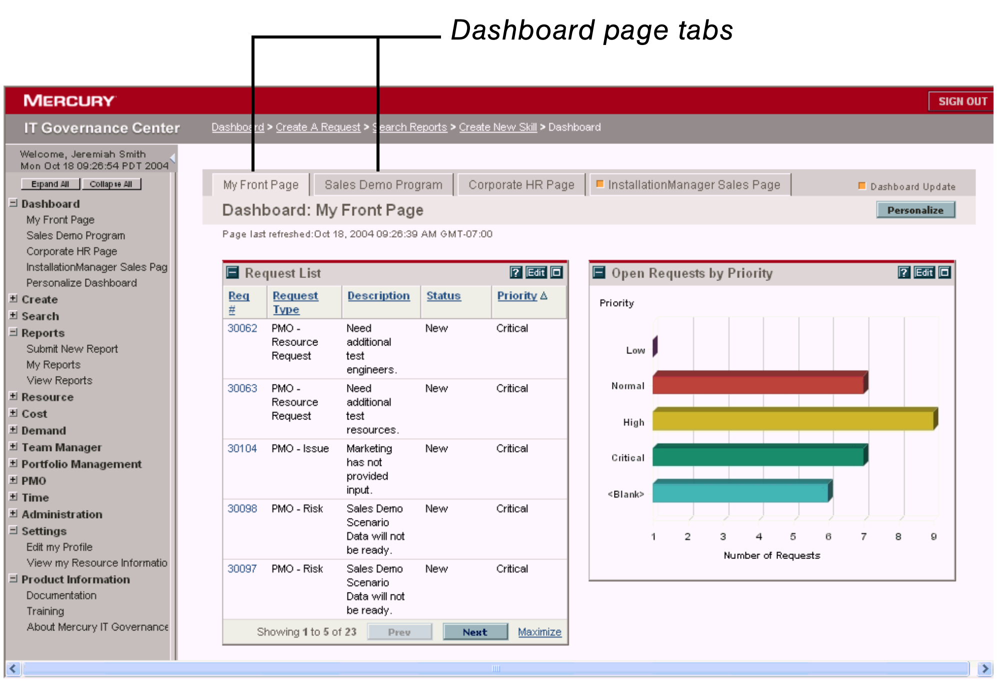


Figure 1-4. Typical Dashboard page

Dashboard pages can come from several different sources. Most of the time, you can pick and choose the Dashboard page and its content, but not always. The following is a list of the different Dashboard pages.

- **Default Dashboard page.** The default Dashboard page is configured by your application administrator and distributed to every Dashboard. It is the first Dashboard page you see when you log on to Mercury IT Governance Center. There is only one default Dashboard page.
- **Published Dashboard pages.** Published Dashboard pages are configured by your application administrator and published to one or many users. You cannot edit a published Dashboard page. Only the application administrator can remove or replace a published Dashboard page. Published Dashboard pages include the word **Publication** on the page. When a published Dashboard page is added or updated to your Dashboard, the **Page Update** icon appears on the tab.
- **Distributed Dashboard pages.** Distributed Dashboard pages are configured by your application administrator and distributed to one or many users. You can edit a distributed Dashboard page, or even remove the page. Once the application administrator gives you a distributed Dashboard page, it's yours. Your application administrator can't edit or remove the page. When a distributed Dashboard page is added to your Dashboard, the **Page Update** icon appears on the tab.
- **Pre-configured Dashboard pages.** Pre-configured Dashboard pages are Dashboard pages you choose to add to your Dashboard. Pre-configured Dashboard pages are either provided by Mercury or configured by your application administrator. Once you add a pre-configured Dashboard page to your Dashboard, you can edit the page to met your specific requirements.
- **Blank pages.** Blank pages are Dashboard pages without portlets. Once you add a blank Dashboard page to your Dashboard, you can configure the Dashboard page to your specifications.

Portlets

Portlets reside on Dashboard pages and display real-time data you want to see. Portlets are very configurable, allowing you to filter through all the data in the system, finding just what you need. There are two basic types of portlets:

- **List portlets.** List portlets present data in tabular form using rows and columns. *Figure 1-5* shows the Request List portlet.
- **Chart portlets.** Chart portlets present data in a graphical form, such as bar charts, pie charts, and bubble charts. *Figure 1-5* shows the Open Request By Priority chart portlet.

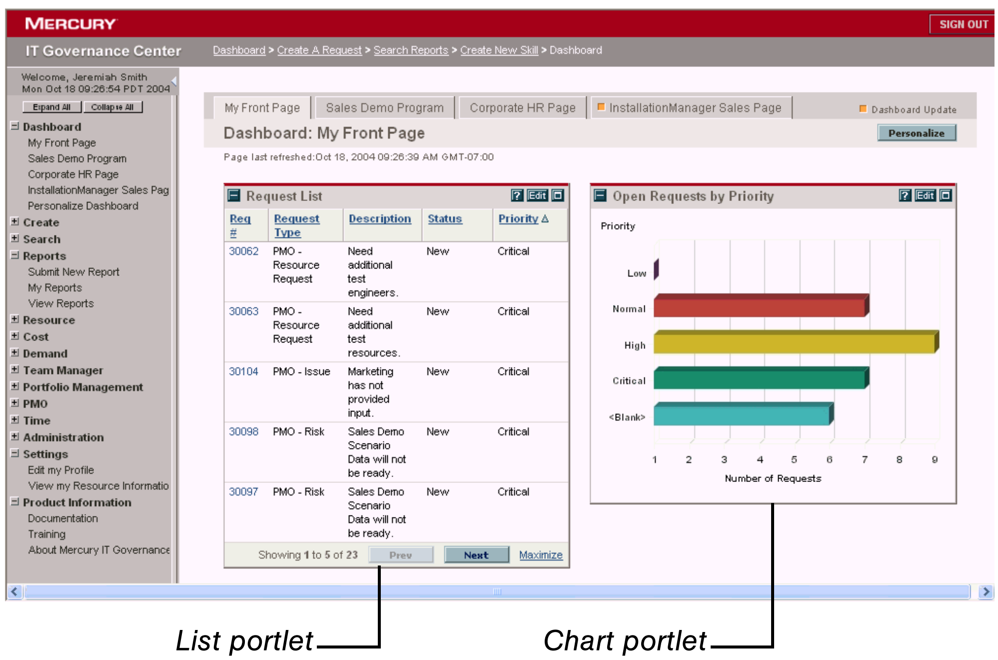


Figure 1-5. Typical portlets

A portlet's edit page is where a portlet is personalized to meet your specific needs. Every portlet edit page has a Preferences section. The Preferences section is where you configure the filters for displaying data you want to see. If your portlet is a list portlet, you also have a Choose Display Columns section. The Choose Display Columns section lets you decide which columns will appear in the portlet.

Accessing Mercury IT Governance Center

Businesses often need to control access to certain information and business processes. This can be done to protect sensitive information, such as employee salaries, or to simplify business processes by hiding data that is irrelevant to the user. Mercury IT Governance Center includes a set of features to help control data and process security on the following levels:

- Limiting who can access certain windows or pages
- Limiting who can view or edit certain fields
- Limiting the data displayed in sensitive fields or screens
- Limiting which users can view, create, edit or process Mercury IT Governance Center entities, such as requests, packages, projects, portfolios, and programs
- Limiting which users can view, create or edit Mercury IT Governance Center configuration entities, such as workflows, request types, object types, and security groups
- Limiting which users can alter the security settings

The following features control the data and process security in Mercury IT Governance Center. These features can be combined in a number of ways to provide a secure system:

- **Licenses.** Each user is assigned a license that provides the user with the potential to access to a set of Mercury IT Governance Center product-related screens and functions. Licenses dictate available behavior but need to be used in conjunction with access grants to enable specific fields and functions.
- **Access grants.** Linked to users through security groups, access grants define which windows and functions users can view, edit, or perform actions in. Access grants also provide varying levels of control over certain entities and fields.
- **Entity-level restrictions.** Settings on the entity that specify who can create, edit, process, and delete Mercury IT Governance Center entities, such as requests, packages, and projects. You can also control which request types and object types can be used with certain workflows. These restrictions are often configured in the configuration entities, such as workflows, request types, and object types.

- **Field-level restrictions.** For each custom field that you define in Mercury IT Governance Center, you can configure when it is visible or editable. For some fields, you can additionally specify which users can view or edit the field.
- **Configuration-level restrictions.** You can specify, using ownership groups settings, which users can modify configuration entities in the system. For example, you can control who is allowed to edit an existing workflow. This allows you to guarantee that only appropriate users are altering your processes controlled by Mercury IT Governance Center.

Using Mercury IT Governance Center

The following scenarios provide examples of how different individuals in an organization might use Mercury IT Governance Center. Each scenario consists of a person in a particular job role going about his or her daily duties and using the Mercury IT Governance Center to accomplish tasks.

Executive Scenario: Managing Your Portfolio of Projects

Linda is the CIO of an IT organization. As the CIO, she is responsible for all of the hardware and software used by the company. She attends executive, program, and project meetings. The following scenario describes how she might use Mercury IT Governance Center:

Preparing for a Meeting to Discuss Project Status

Linda is preparing for an executive meeting to discuss the current status of all the projects. She wants to see the current status of all projects. She is not currently logged on to Mercury IT Governance Center.

- Linda logs on to Mercury IT Governance Center. (See the section *Logging On and Off Mercury IT Governance Center*.)
- Her front page has been personalized to include the Program Project portlet for every program. The Program Project List portlet displays all the projects within a program, their summary condition, and the project manager. Her front page also includes the Project List portlet. The Project List portlet has been personalized to display all projects not associated with a program. (See the section *Personalizing Portlets*.)

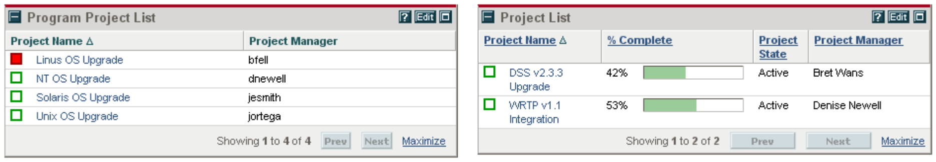


Figure 1-6. Executive scenario

- From the Program Project List portlet, Linda selects the project and opens the Project Overview page. On the Project Overview page, she sees one task is late. There is no reason why the task is late. (See the *Mercury Project Management User's Guide*.)
- From the Project Overview page, Linda selects the program. The Manage Program page for the program opens. On the Manage Program page, three issues are shown in the Details section. One of the issues is critical. Linda opens the critical issue. From the issue's detail page, she discovers two important developers have been reassigned to a corporate mission-critical project. (See the *Mercury Program Management User's Guide*.)
- Linda checks the resource pool to see if replacement developers can be assigned to the late task. (See the *Mercury Resource Management User's Guide*.)

Management Scenario: Scheduling Tasks and Resources

Hans is the manager of an application support group within an IT organization. As manager, he is responsible for several mission-critical software applications being used by the company. As an IT manager, he attends project meetings and is a voting member of the IT Release Team. The following scenario describes how he might use Mercury IT Governance Center:

Verifying a Package

Hans receives an automatically generated email stating that a package is ready for release. The email includes a link to the package. He clicks on the link to open the package. As he is not currently logged on to Mercury IT Governance Center, he must log on before he can see the package. (See the section *Logging On and Off Mercury IT Governance Center*.)

- The package opens in the Package window of the Workbench. Attached as references are the test plans and test results. He opens and reads the test plans and test results and determines the package is ready for release. In the Package window, he approves the release of the package. (See the *Mercury Change Management User's Guide*.)

- He closes the Workbench but leaves the standard interface open. (See the section *Opening and Closing the Workbench*.)

Assigning a Resource

In the standard interface, Hans checks his Request List portlet to see if there are any new requests assigned to him. His Request List portlet has been personalized to show only new requests assigned to him. Three new requests are listed in the portlet. (See the section *Personalizing Portlets*.)

Figure 1-7. Management scenario

- Each request listed in the Request List portlet is linked to its request detail page. Hans clicks the link to open the request's detail page, where he evaluates each request. Two of the requests are valid. The third request is not valid and he rejects the request. (See the *Mercury Demand Management User's Guide*.)

- For each of the valid requests, he uses the resource finder to determine which resource in his resource pool is available and has the right skills. The most qualified resources are assigned to each request. (See the *Mercury Resource Management User's Guide*.)

Watching a Project

In the standard interface, Hans checks on the projects. He opens the Project Overview page for each project to view the current status of several ongoing tasks. (See the *Mercury Project Management User's Guide*.)

Adding a Portlet

On one project, several tasks are running later than anticipated. He decides to keep a closer watch on these tasks. To keep a closer watch, he adds the Project Gantt portlet to one of his Dashboard pages. He then personalizes the portlet to show the project and all in-progress tasks. (See the sections *Adding Portlets to Dashboard Pages* and *Personalizing Portlets*.)

User Scenario: Completing Tasks and Requests

Jane is an application coder in the application support group managed by Hans. She is responsible for implementing changes to a mission-critical software application being used by the company. She attends some project meetings. The following scenario describes how she might use Mercury IT Governance Center:

Keeping Requests Current

Jane needs to know if any new jobs have come her way. Jane logs on to Mercury IT Governance Center. In the standard interface, Jane checks her My Requests portlet to see if there are any new requests assigned to her. There are a total of six requests listed in My Requests portlet. Five of the requests are **Pending** or **In Progress.** One of the requests is **Open.**

- Each request listed in the My Requests portlet is linked to its request detail page. For the **Open** request, Jane clicks the link to open the request's detail page, where she evaluates the request. She adds an estimated start date to the request. She also adds a note to the request, asking a specific question concerning the request. (See the *Mercury Demand Management User's Guide*.)

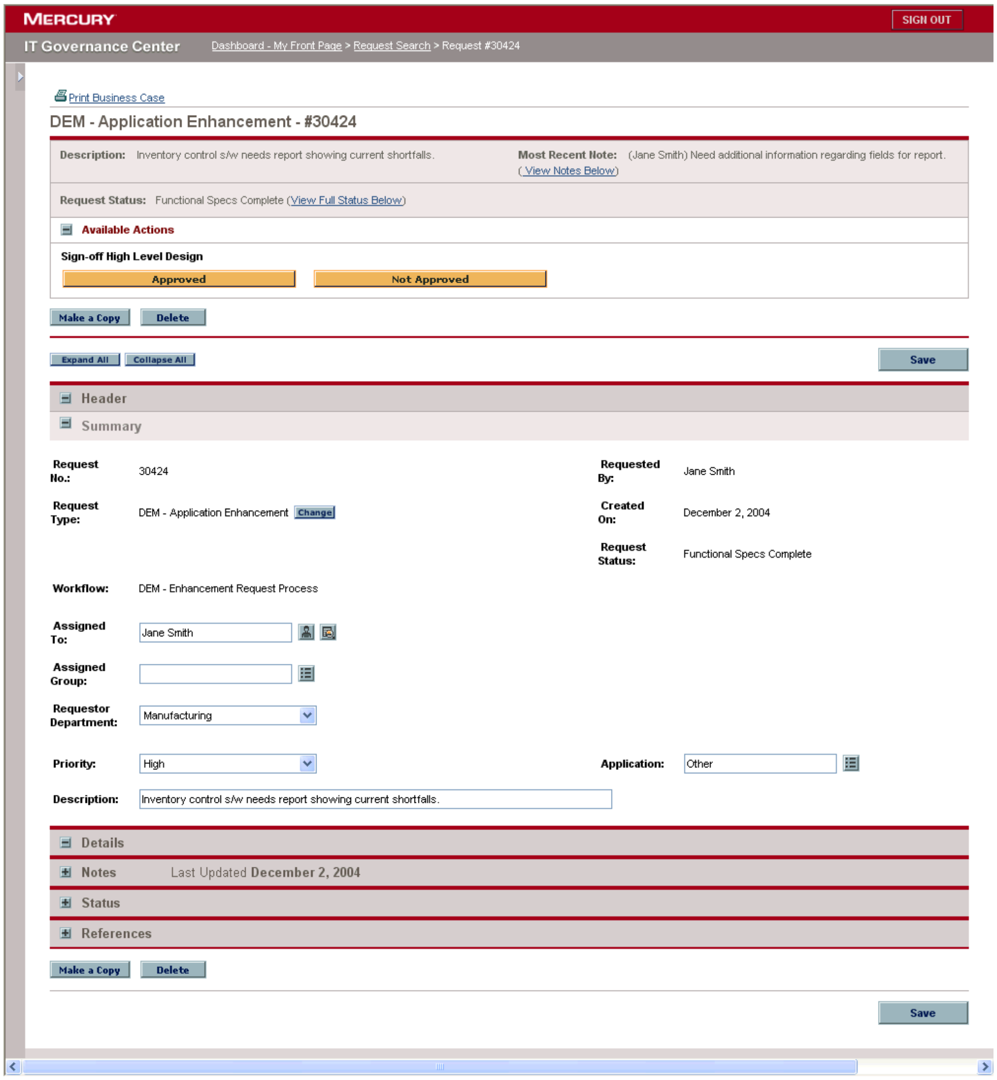


Figure 1-8. User scenario

- Jane sends an email to the originator of the request, asking that person to review the request's detail page and add specific information to the Notes section.

Keeping Tasks Current

Jane completes a task that is part of a project. Jane logs on to Mercury IT Governance Center. On a Dashboard page is the My Tasks portlets. For the task completed, she sets the Task State to **Completed.**

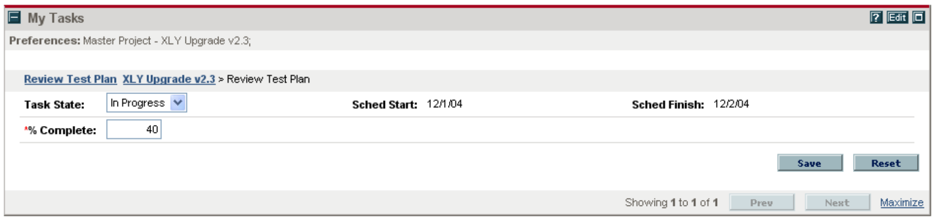


Figure 1-9. User scenario

After This Document

Once you've read this document, you'll be able to get around the Mercury IT Governance Center standard interface and the Workbench.

But then what?

You'll be ready to learn to use Mercury IT Governance Center in greater detail, according to the role you play in your organization. *Table 1-1* lists possible roles and some of the tasks associated with the Mercury IT Governance Center, and where the task is documented.

For complete information concerning Mercury IT Governance Center documents and how to access them, see the *Guide to Documentation*. For information about Mercury IT Governance Center terms and concepts, see the *Key Concepts* document.

Table 1-1. Roles, processes, and documents

Roles	Processes	Documents
All Users	Logging on and logging off Mercury IT Governance Center	*Getting Started*
All Users	Adding and personalizing portlets	*Getting Started*
All Users	Adding and personalizing Dashboard pages	*Getting Started*
All Users	Running reports	*Getting Started*
All Users	Running searches	*Getting Started*
All Users	Creating requests	*Mercury Demand Management User's Guide*
All Users	Finding and modifying requests	*Mercury Demand Management User's Guide*
All Users	Creating Time Sheets	*Mercury Time Management User's Guide*
Application Developers	Creating packages	*Mercury Change Management User's Guide*
Application Developers and Managers	Processing packages	*Mercury Change Management User's Guide*
Application Developers and Managers	Migrating packages	*System Administration Guide and Reference*
Application Developers and Managers	Releasing packages	*Mercury Change Management: Configuring a Deployment System*
System/Instance/ Database Administrators	Installing Mercury IT Governance Center	*System Administration Guide and Reference*
System/Instance/ Database Administrators	Upgrading Mercury IT Governance Center	*System Administration Guide and Reference*
System/Instance/ Database Administrators	Backing up Mercury IT Governance Center	*System Administration Guide and Reference*
System/Instance/ Database Administrators	Monitoring Mercury IT Governance Center	*System Administration Guide and Reference*

Table 1-1. Roles, processes, and documents [continued]

Roles	Processes	Documents
Application Developers and Configurators	Creating workflows	*Mercury Demand Management: Configuring a Request Resolution System* *Mercury Change Management: Configuring a Deployment System*
Application Developers and Configurators	Creating request types	*Mercury Demand Management: Configuring a Request Resolution System*
Application Developers and Configurators	Creating object types	*Mercury Change Management: Configuring a Deployment System*
Application Developers and Configurators	Creating environments	*Mercury Change Management: Configuring a Deployment System*
Application Developers and Configurators	Creating environment groups	*Mercury Change Management: Configuring a Deployment System*
Application Developers and Configurators	Creating user data	*Mercury Demand Management: Configuring a Request Resolution System* *Mercury Change Management: Configuring a Deployment System*
Application Developers and Configurators	Creating notification templates	*Mercury Demand Management: Configuring a Request Resolution System* *Mercury Change Management: Configuring a Deployment System*
Application Developers and Configurators	Creating contacts	*Mercury Demand Management: Configuring a Request Resolution System*
Application Developers and Configurators	Creating and using validations	*Commands, Tokens, and Validations Guide and Reference*
Application Developers and Configurators	Creating and using special commands	*Commands, Tokens, and Validations Guide and Reference*
Application Developers and Configurators	Creating and using tokens	*Commands, Tokens, and Validations Guide and Reference*
Application Developers and Configurators	Creating users	*Security Model Guide and Reference*
Application Developers and Configurators	Creating security groups	*Security Model Guide and Reference*
Application Developers and Configurators	Assigning access grants	*Security Model Guide and Reference*
Application Developers and Configurators	Migrating Mercury IT Governance Center	*System Administration Guide and Reference*

Table 1-1. Roles, processes, and documents [continued]

Roles	Processes	Documents
Application Developers and Configurators	Configuring time policies	*Mercury Time Management Configuration Guide*
Application Developers and Configurators	Configuring delegations	*Mercury Time Management Configuration Guide*
Application Developers and Configurators	Configuring time sheet reviewers	*Mercury Time Management Configuration Guide*
Application Developers and Configurators	Configuring Program Management	*Mercury Program Management Configuration Guide*
Application Developers and Configurators	Configuring Demand Management	*Mercury Demand Management: Configuring a Request Resolution System*
Application Developers and Configurators	Configuring Change Management	*Mercury Change Management: Configuring a Deployment System*
Application Developers and Configurators	Configuring IT demand	*Configuring IT Demand Tracking and Management*
Application Developers and Configurators	Configuring Portfolio Management	*Mercury Portfolio Management Configuration Guide*
Application Developers and Configurators	Configuring Time Management	*Mercury Time Management Configuration Guide*
IT Managers	Creating portfolio scenarios	*Mercury Portfolio Management User's Guide*
IT Managers	Managing and analyzing IT demand	*Guide to Tracking and Managing IT Demand*
IT Managers	Creating projects	*Mercury Project Management User's Guide*
IT Managers	Grouping and assigning users	*Mercury Resource Management User's Guide*
IT Managers	Creating budgets	*Mercury Financial Management User's Guide*
IT Managers	Creating work allocations	*Mercury Time Management User's Guide*
Managers	Creating projects	*Mercury Project Management User's Guide*
Managers	Grouping and assigning users	*Mercury Resource Management User's Guide*
Managers	Creating budgets	*Mercury Financial Management User's Guide*
Managers	Reviewing time sheets	*Mercury Time Management User's Guide*
Managers	Creating work allocations	*Mercury Time Management User's Guide*
Project and Program Managers	Creating projects	*Mercury Project Management User's Guide*

Table 1-1. Roles, processes, and documents [continued]

Roles	Processes	Documents
Project and Program Managers	Creating programs	*Mercury Program Management User's Guide*
Project and Program Managers	Grouping and assigning users	*Mercury Resource Management User's Guide*
Project and Program Managers	Creating budgets	*Mercury Financial Management User's Guide*
Project and Program Managers	Reviewing time sheets	*Mercury Time Management User's Guide*
Project and Program Managers	Creating work allocations	*Mercury Time Management User's Guide*

Chapter 2
Using the Standard Interface

In This Chapter:

- *Logging On and Off Mercury IT Governance Center*
  - *Logging On to Mercury IT Governance Center*
  - *Logging Off Mercury IT Governance Center*
- *Expanding and Collapsing Menus*
- *Hiding and Displaying the Menu Bar*
- *Creating Requests, Packages, and Other Entities*
- *Searching for Requests, Packages, and Other Entities*
  - *Running New Searches*
  - *Running Saved Searches*
  - *Creating Saved Searches*
  - *Managing Saved Searches*
  - *Managing Saved Search Categories*
- *Running Reports*
  - *Running New Reports*
  - *Opening Existing Reports*
- *Changing Your Settings*
  - *Changing Your Password*
  - *Setting Maximized Views for Portlets*
  - *Setting Cost Displays*
- *Viewing Product Information and Online Documentation*
  - *Accessing Documentation*
  - *Viewing Version and User Access Information*
- *Using the Dashboard*
  - *Opening Dashboard Pages*
  - *Setting Portlet Views*

    - *Arranging Data in List Portlets*
    - *Drilling Down from Portlets*
    - *Exporting Data to Excel Spreadsheets*
- *Personalizing Dashboards*
    - *Adding Dashboard Pages*
    - *Moving and Deleting Dashboard Pages*
    - *Renaming Dashboard Pages*
    - *Setting Refresh Rates for Dashboard Pages*
    - *Adding Portlets to Dashboard Pages*
    - *Copying and Moving Portlets on Dashboard Pages*
- *Personalizing Portlets*
    - *Deleting Portlets*
    - *Changing the Size of Portlets*
    - *Configuring Portlets*

Logging On and Off Mercury IT Governance Center

The standard interface is accessed through a Web browser over a network. Before logging on to the standard interface, you must have the following:

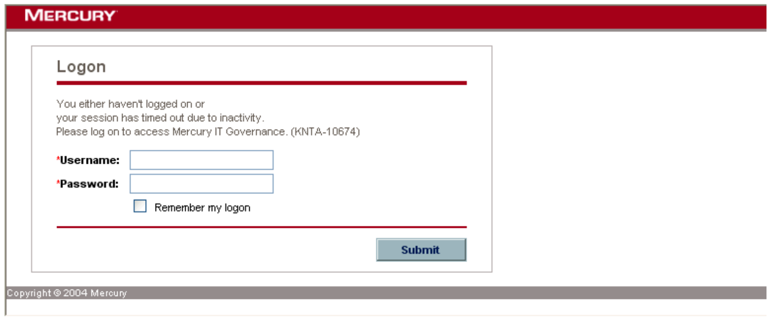
- Mercury IT Governance Center Web address (URL)
- A username
- A password
- At least one Mercury IT Governance Center product license

Logging On to Mercury IT Governance Center

To log on to the Mercury IT Governance Center:

1. From the Web browser, enter the Mercury IT Governance Center Web address.

   The Mercury IT Governance Center Logon page appears.

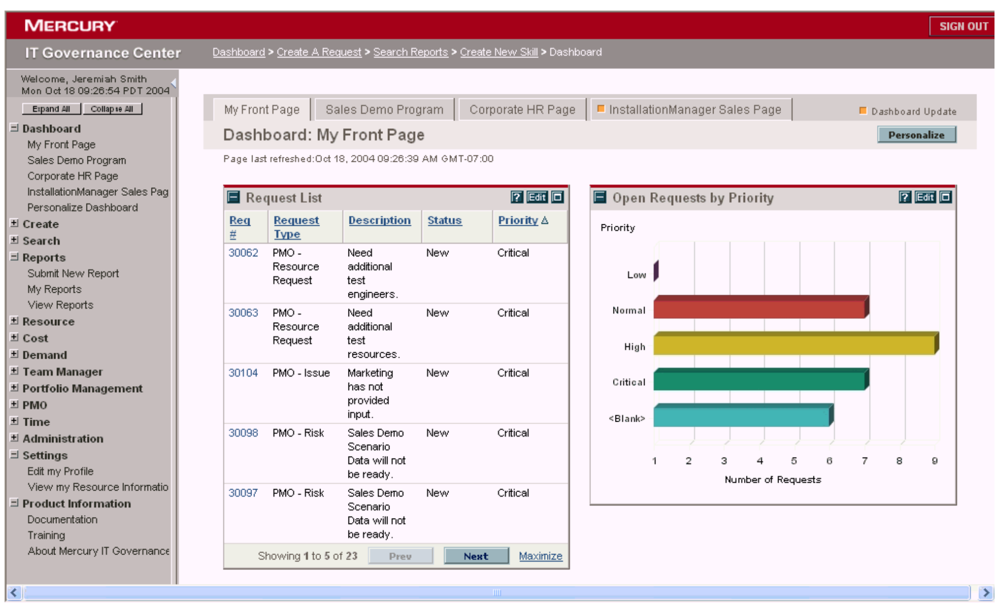


2. Enter the username and password in the appropriate fields.

   To have the server retain a password, select the **Remember my logon** checkbox. Once this checkbox is selected, you don't have to enter a password each time you log on.

3. On the Mercury IT Governance Center Logon page, click **Submit.**

   The standard interface opens. First-time users might be prompted for a new password.



Logging Off Mercury IT Governance Center

To log off Mercury IT Governance Center, in the upper-right corner of the standard interface, click **Sign Out** (see *Figure 2-1*).

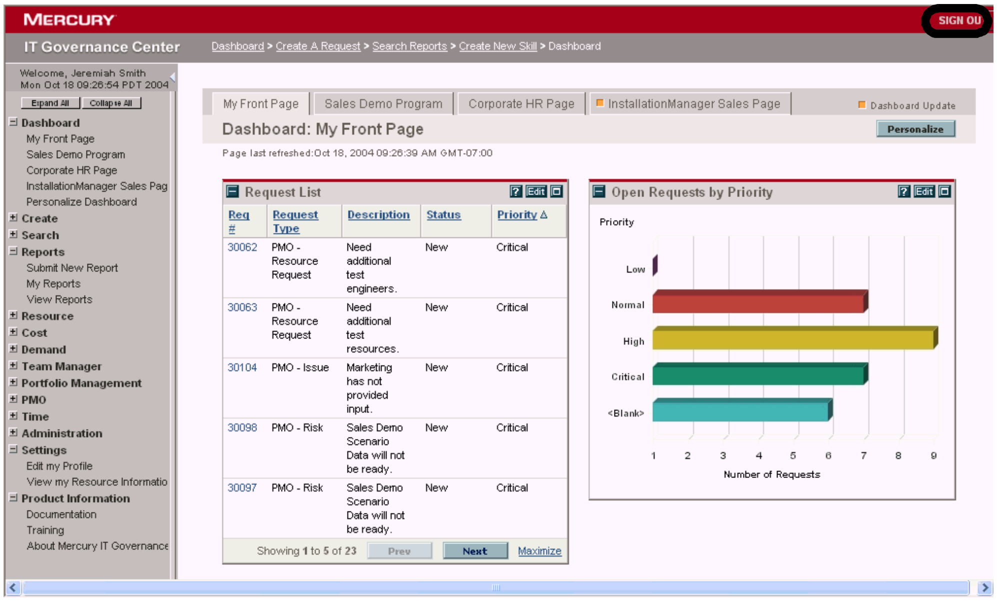


Figure 2-1. Logging off the standard interface

Expanding and Collapsing Menus

The menu bar presents a hierarchical organization of menus, submenus and menu items. Menus and submenus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. Some links, like **Create > Package** and **Create > Project**, open windows in the Workbench.

You can expand all of the menus to view every menu, submenu, and menu item. You can also collapse all of the menus, leaving only the menus visible.

- To expand all of the menus to view every menu, submenu, and menu item, click the **Expand All** button at the top of the menu bar.
- To collapse all of the menus, leaving only the menus visible, click the **Collapse All** button at the top of the menu bar.

Figure 2-2 shows the location of the **Expand All** and **Collapse All** buttons.

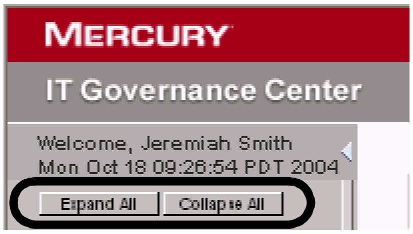


Figure 2-2. Expand All and Collapse All buttons

Hiding and Displaying the Menu Bar

You can hide or display the menu bar, depending upon your preference.

- To hide the menu bar, click the **Hide Menu Bar** icon at the top of the menu bar (see *Figure 2-3*).

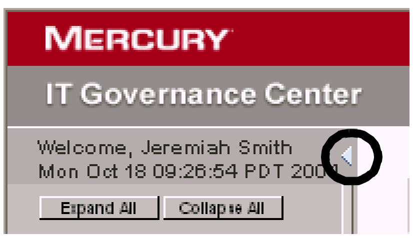


Figure 2-3. Hiding the menu bar

- Once the menu bar is hidden, you can display the menu bar by clicking the **Display Menu Bar** icon at the below the Mercury logo (see *Figure 2-4*).

Figure 2-4. Displaying the menu bar

Creating Requests, Packages, and Other Entities

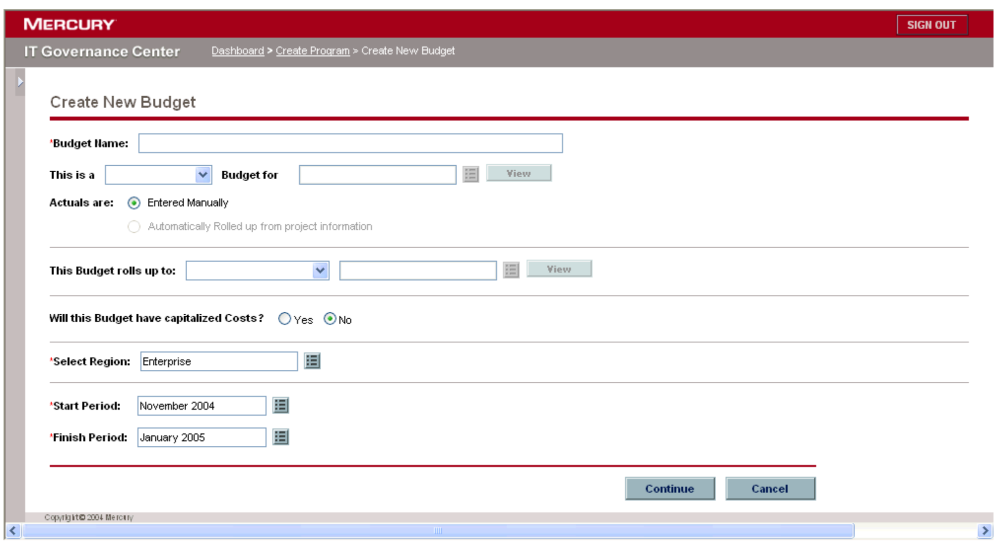
Entities are the requests and packages and projects and other objects you work with when using Mercury IT Governance Center. The entities you can create depend upon the access grants you have been given by the application administrator.

To create an entity:

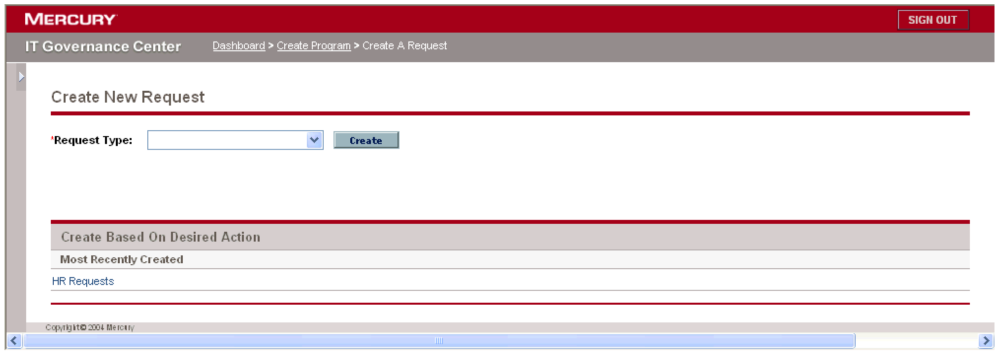
1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Create > <*Entity*>**, where **<*Entity*>** is the entity type you want to create, such as a **Request** or **Project.**

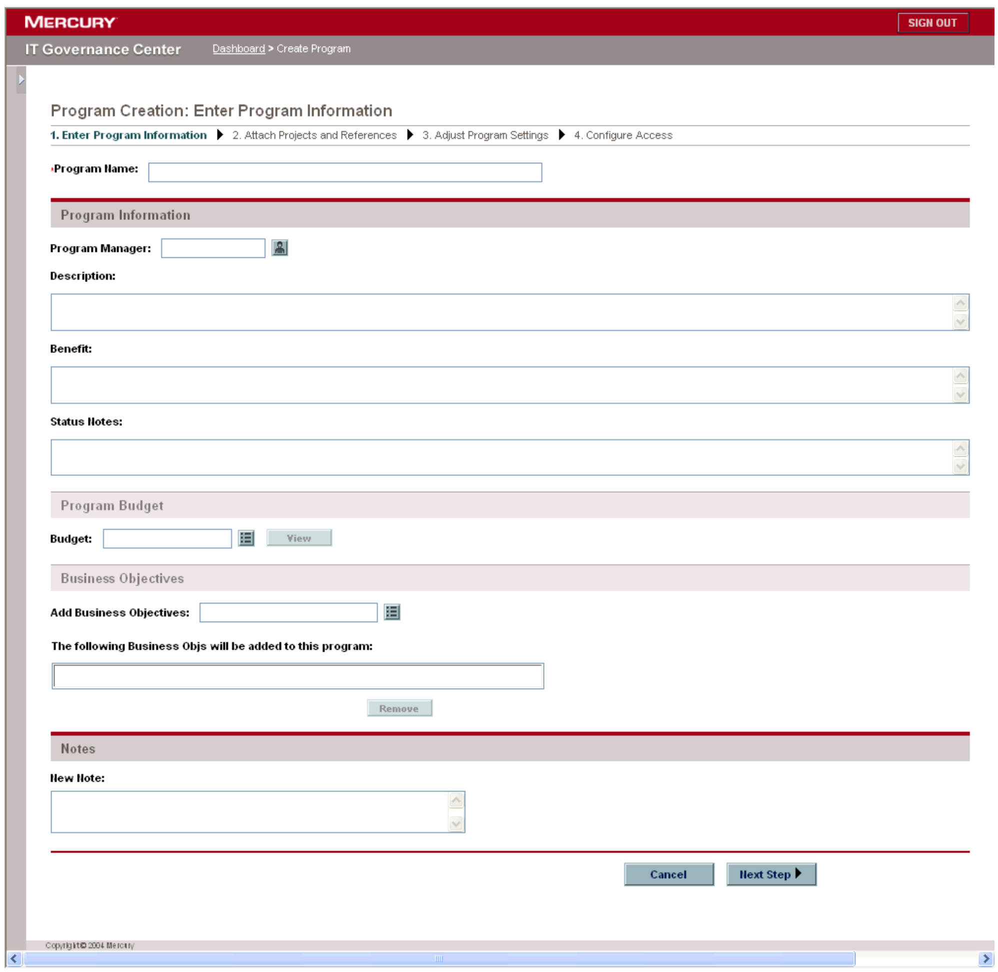
   The create page appears. The create page includes the fields associated with the entity type. Not all entities are alike. Some entities have a single entity type, such as budgets and skills.



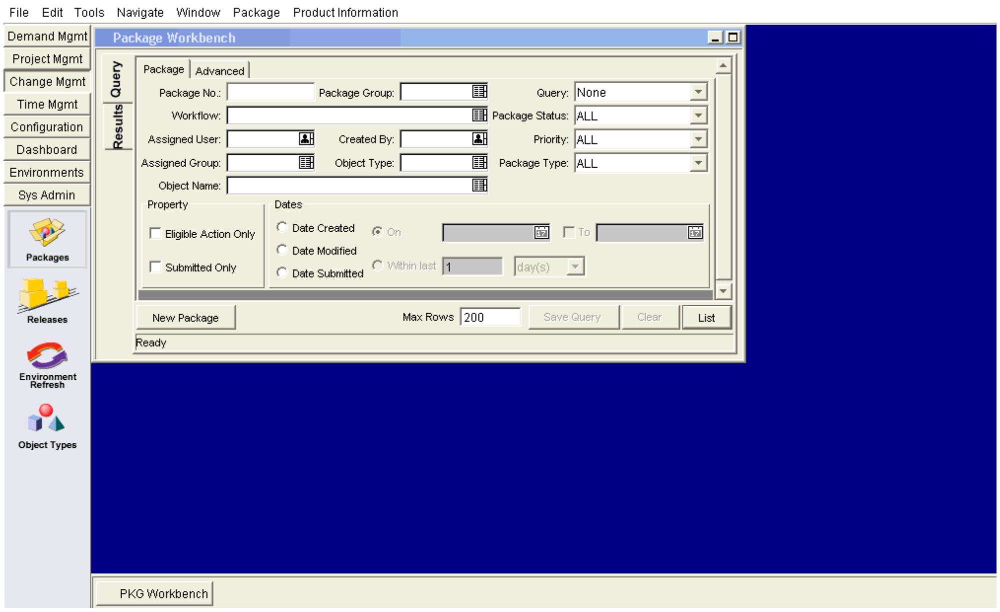
   Some entities have multiple entity types, such as requests. For those entities, you must select the entity type before the create page appears.



Some entities, such as programs, require you to follow a process to create an entity. For those entities, you must complete the entire process to create the entity.



Finally, some entities, such as packages, require the Workbench to create the entity. For those entities, you must complete all of the required Workbench Detail windows to create the entity. You must also have the access grants required to open the Workbench. For more information on how to create packages, see the *Mercury Change Management User's Guide*.



Searching for Requests, Packages, and Other Entities

Searches are used to find existing entities within Mercury IT Governance Center. Searching for entities does not use the Mercury IT Governance Center document management capabilities.

Running New Searches

To run a new search:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Search > <*Entity*>**, where **<*Entity*>** is the entity type you want to find, such as a **Request** or **Project.**

   The search page appears. The search page includes the fields associated with the search type.
3. On the search page, fill in all the required parameters and any optional parameters and click **Search.**

   The Search Results page appears in a separate page.

Running Saved Searches

To run a saved search:

1. Log on to Mercury IT Governance Center.
2. On the menu bar, under **Searches > Saved Searches,** click on a saved search.

   The saved search is run. The Search Results page appears in a separate page.

Creating Saved Searches

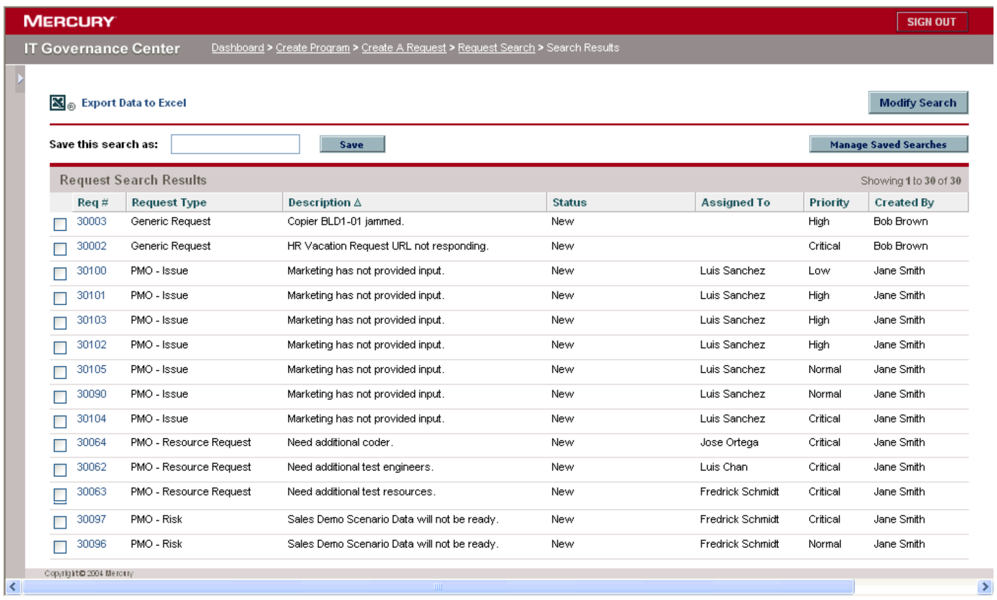
You can save and re-run commonly run searches.

To save a search:

1. Log on to Mercury IT Governance Center.

2. Run a search.

   For instruction on how to run a search, see the section *Running New Searches*. The Search Results page appears in a separate page.



3. In the Save this search as field, enter a name for the search and click **Save.**

   A dialog window opens, displaying the results of the save.

   - Click **Manage Saved Searches** to go to the Manage Saved Searches page.

   - Click **Return to Search Results** to return to the search results.

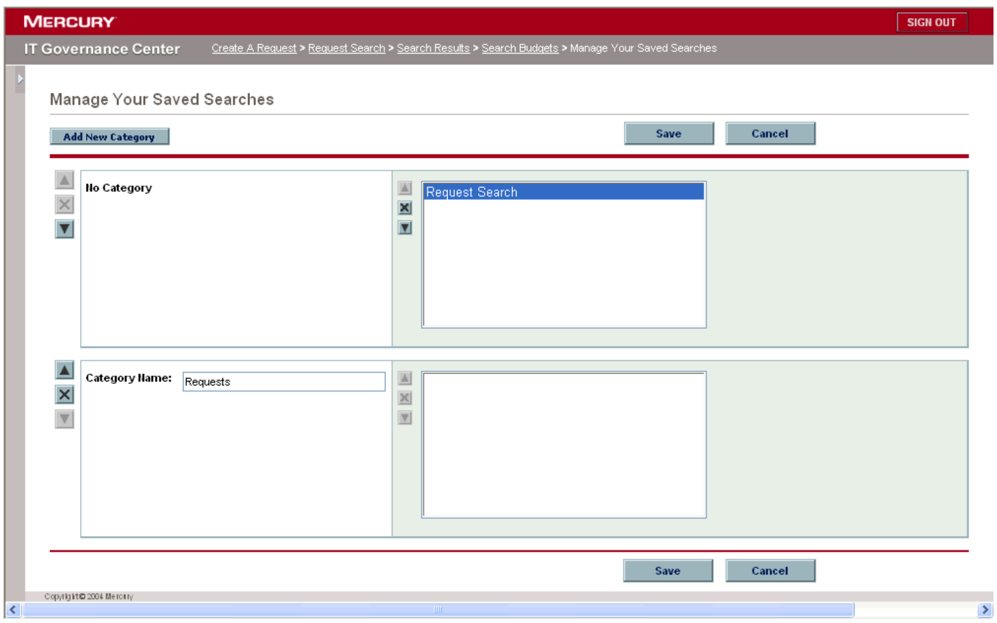
Managing Saved Searches

You can move between saved search categories and delete saved searches.

To manage a saved search:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Searches > Manage Saved Searches.**

   The Manage Your Saved Searches page appears.



3. Move or delete a saved search.

   - To move a saved search:

   a. Select a saved search.

      The **Move Arrow** and **Delete** icons for the selected saved search are enabled.

   b. Click an enabled **Move Arrow** icon to move the saved search.

      The selected saved search can move up or down in the category and move between categories.

c. On the Manage Your Saved Searches page, click **Save.**

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

- To delete a saved search:

a. Select a saved search.

The **Move Arrow** and **Delete** icons for the selected saved search are enabled.

b. Click the enabled **Delete** icon to delete the saved search.

The selected saved search is deleted.

c. On the Manage Your Saved Searches page, click **Save.**

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

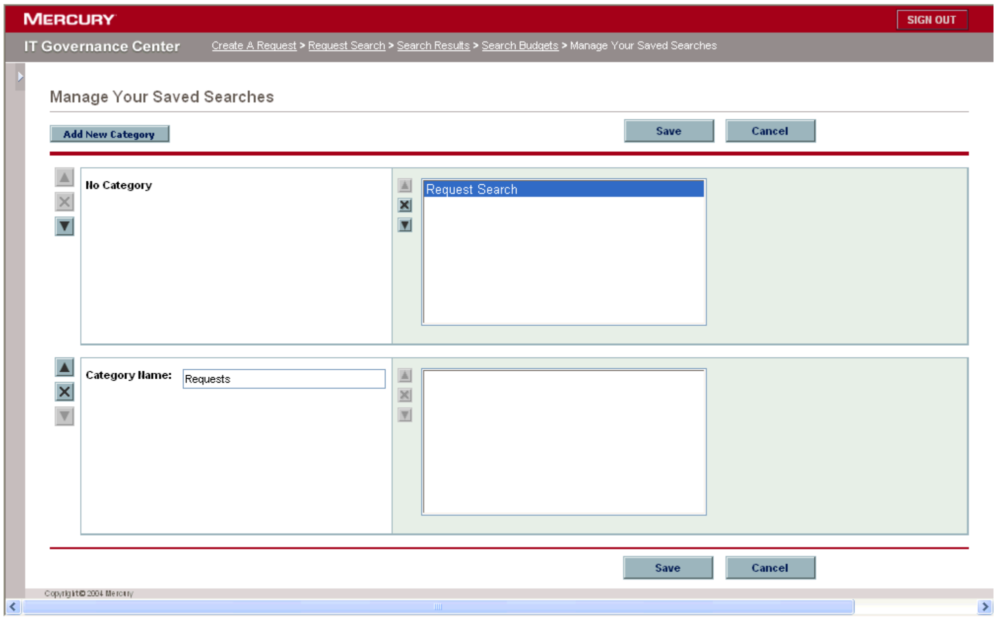
Managing Saved Search Categories

You can create, move, or delete saved search categories.

To manage a saved search category:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Searches > Manage Saved Searches.**

   The Manage Your Saved Searches page appears.



3. Create, move, or delete a saved search category.

- To create a saved search category:

  a. On the Manage Your Saved Searches page, click **Add New Category.**

     A new category section opens.

  b. In the Category Name field of the new category section, enter the name of the new category and click **Save.**

     The new category is created and saved. When the category includes a saved search, the category will appear in the menu bar.

- To move a saved search category:

  a. In a Category section to move, click a **Move Arrow** icon to move the category.

     The **Move Arrow** icons available to a category are always enabled.

  b. On the Manage Your Saved Searches page, click **Save.**

     The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

- To delete a saved search category:

a. In a Category section to delete, click the **Delete** icon to delete the category.

When a **Delete** icon is enabled, the category can be deleted. If the **Delete** icon is not enabled, you cannot delete the category.

b. On the Manage Your Saved Searches page, click **Save.**

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

Running Reports

Mercury IT Governance Center comes with a number of ready-to-run reports. Many of these reports can also be customized to meet your specific requirements.

For More Information

For information about specific reports, see the *Reports Guide and Reference*.

Running New Reports

To run a new report:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Reports > Submit New Report.**

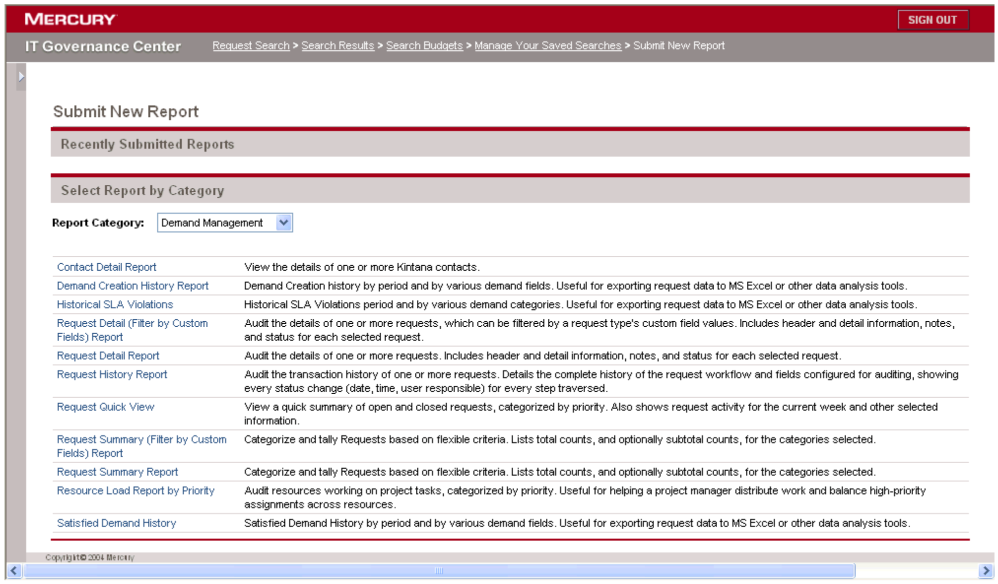
   The Submit New Report page appears.

3. Select a report.

   The following lists the ways in which to select a report:

   - In the Recently Submitted Reports section, select a report. The report's submission page appears.

- In the Report Category field, select a report category. The Submit New Report page is refreshed with the available reports. Select a report. The report's submission page appears.



4. On the report's submission page, fill in all the required filter fields, any optional filter fields, and click **Submit.**

   The Report Submitted page appears prior to the report.

Opening Existing Reports

Once a report is run, Mercury IT Governance Center saves that report, allowing you or others to view the report at a later date.

To open an existing report:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Reports > View Reports.**

   The Search Reports page appears. The Search Reports page includes the fields associated with searching for an existing report. To view your saved reports, select **Reports > My Reports.**

3. On the Search Reports page, fill in all the required filter fields and any optional filter fields, and click **Search.**

   The Report Search Results page appears. All existing reports meeting the report search criteria are listed.

4. On the Report Search Results page, select the report.

   The previously run report is opened.

Changing Your Settings

Using the **Settings** menu, you can adjust several interface settings to fit your own preferences. You can also change your password.

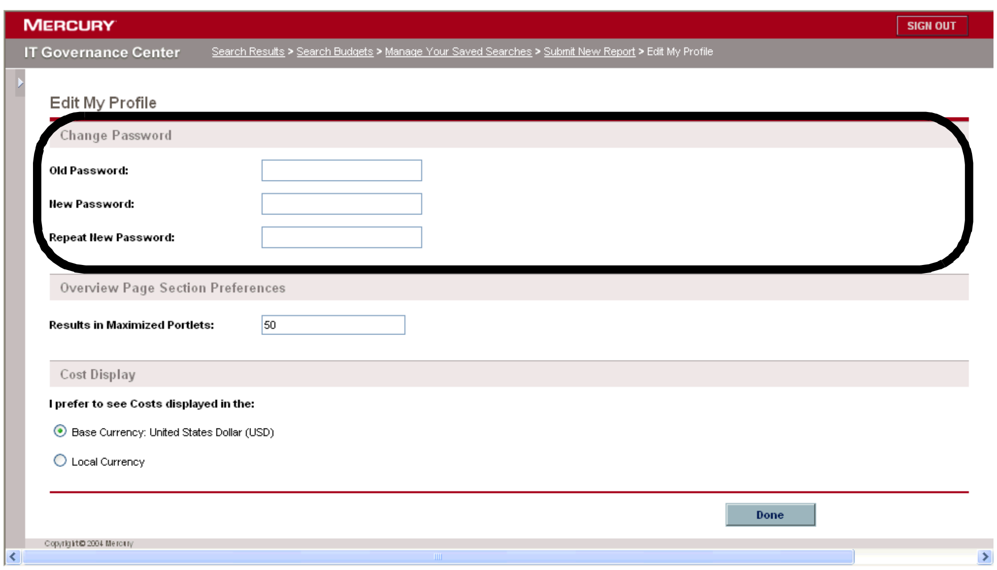
Changing Your Password

To change your password:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, click **Settings > Edit my Profile.**

   Change your password in the Change Password section.



3. In the Change Password section, complete the fields and click **Done.**

   The new password is accepted.

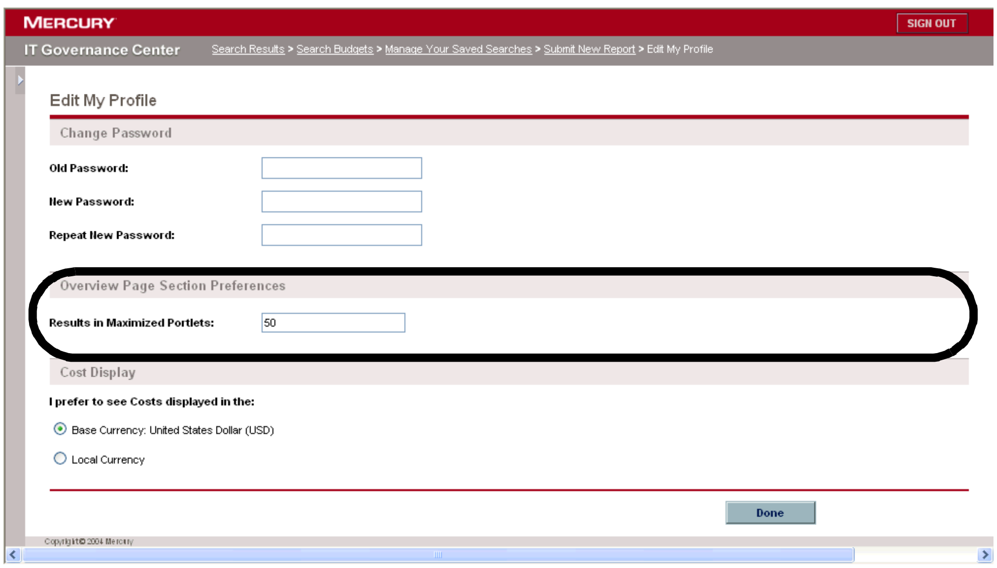
Setting Maximized Views for Portlets

A portlet's maximized view displays more of the data gathered from the system than in the normal view. The number of rows displayed in the maximized view can be configured to be greater than in the normal view.

To change your portlet's maximized view setting:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, click **Settings > Edit my Profile.**

   Change your portlet maximized view setting in the Overview Page Section Preferences section.



3. In the Results in Maximized Portlets field, enter the number of entries you want to see in a maximized view and click **Done.**

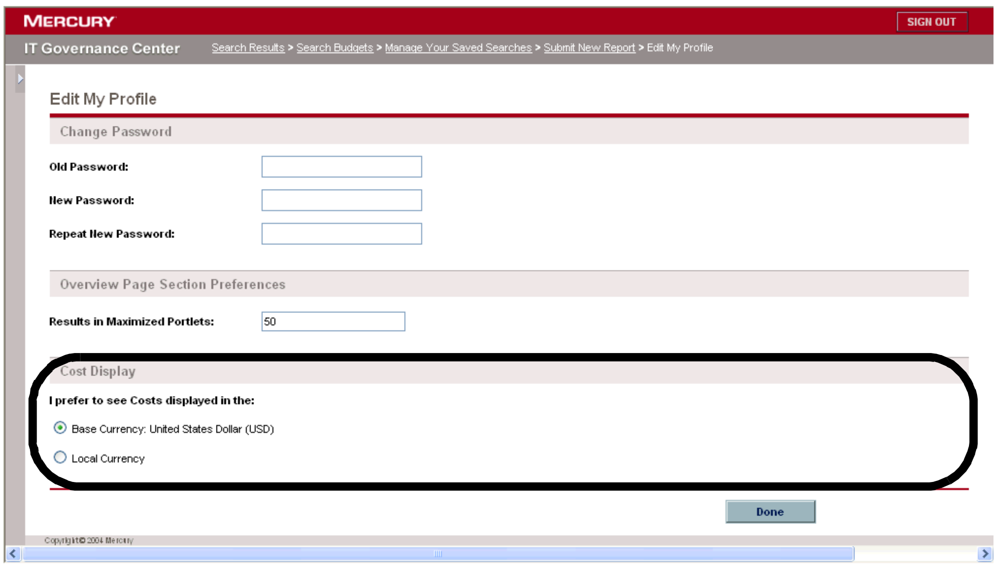
   The new portlet maximized view setting is accepted.

Setting Cost Displays

To change your cost display setting:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, click **Settings > Edit my Profile.**

   Change your cost display setting in the Cost Display section.



3. In the Cost Display section, select how you want to view costs.

   Selecting one option deselects the other option. Choose one of the following:

   - Base Currency: United States Dollar (USD)
   - Local Currency

4. At the lower-right corner of the Edit My Profile page, click **Done.**

   The new cost display setting is accepted.

Viewing Product Information and Online Documentation

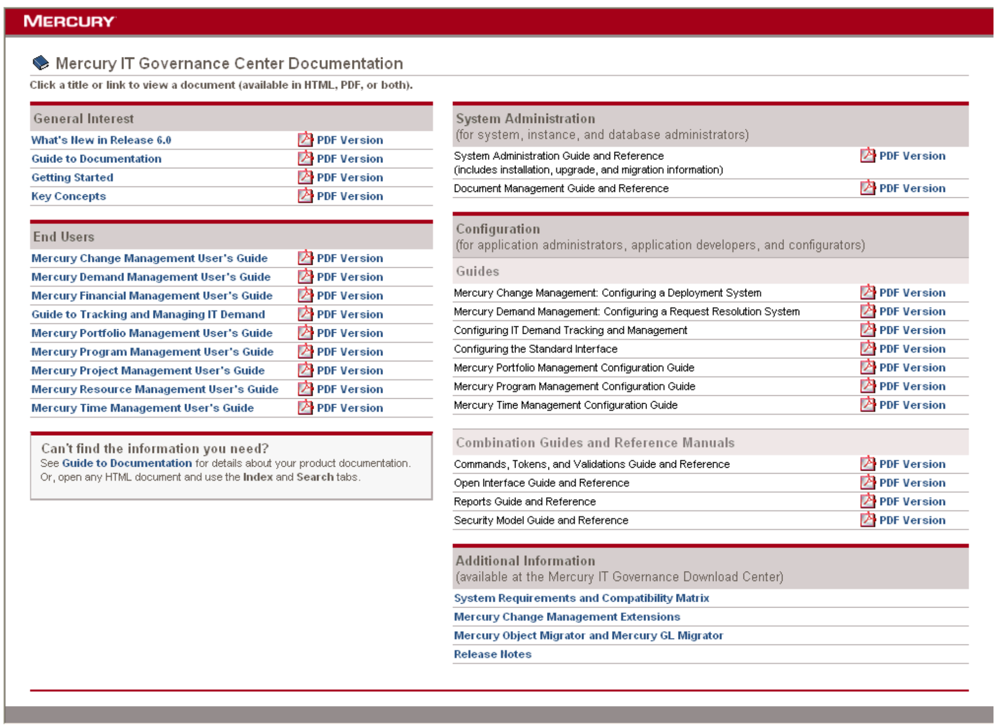
At the bottom of the menu bar is the **Product Information** menu. The **Product Information** menu provides you with access to the Documentation page, Training page, and About Mercury IT Governance Center page.

Accessing Documentation

To find the available documentation:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Product Information > Documentation.**

   The Documentation home page appears.



For More Information

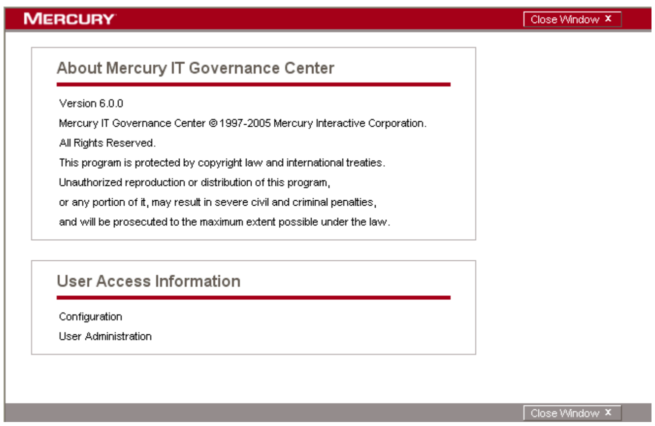
For more information about Mercury IT Governance Center documentation, see the *Guide to Documentation*.

Viewing Version and User Access Information

To view the current version of the Mercury IT Governance Center, and to see the user access information:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Product Information > About Mercury IT Governance Center.**

   The About Mercury IT Governance Center page appears.



Using the Dashboard

The Dashboard collects data from the Mercury IT Governance Center and displays the data in real time. System data is organized using Dashboard pages and portlets. Every Dashboard has at least one Dashboard page.

Opening Dashboard Pages

Every Dashboard can have one or more Dashboard pages. Every Dashboard page includes a tab at the top of the Dashboard page. To move from one Dashboard page to another, select the Dashboard page tab (see *Figure 2-5*).

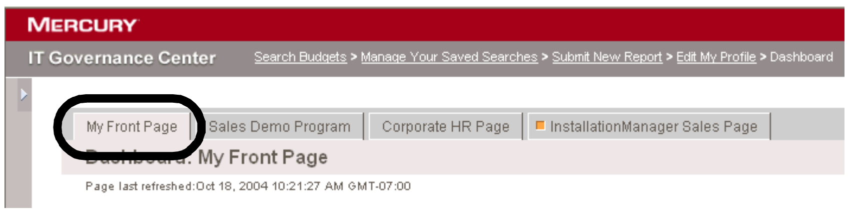


Figure 2-5. Dashboard page tab

Setting Portlet Views

Portlets can be set to one of the following views:

- **Minimize view.** Only the portlet's title bar is visible. A portlet retains a minimized view between standard interface sessions. To minimize a portlet, in the portlet's normal view, click the **Minimize** icon (see *Figure 2-6*).
- **Normal view.** The default view of the portlet. For list portlets, the default rows and columns are visible in the portlet. For chart portlets, the chart or graph is visible. A portlet retains a normal view between standard interface sessions. To return a minimized portlet to the normal view, in the portlet's minimized view, click the **Normal** icon (see *Figure 2-6*).

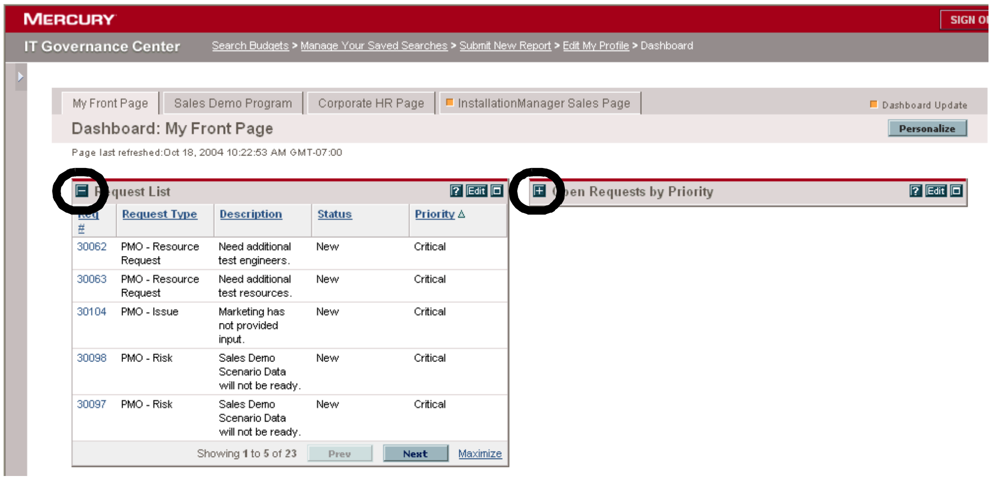


Figure 2-6. Normal and minimized views of portlets

- **Maximize view.** A maximized view of a portlet appears in a new page. A maximized view of a portlet contains more rows and columns than a portlet in a normal view. Maximized views of portlets are not retained between standard interface sessions. To see a portlet's maximized view, in the portlet's normal view, click the **Maximize** icon (see *Figure 2-7*). To return a maximized view portlet to the normal view, in the portlet's maximized view, click **Back** (see *Figure 2-8*).

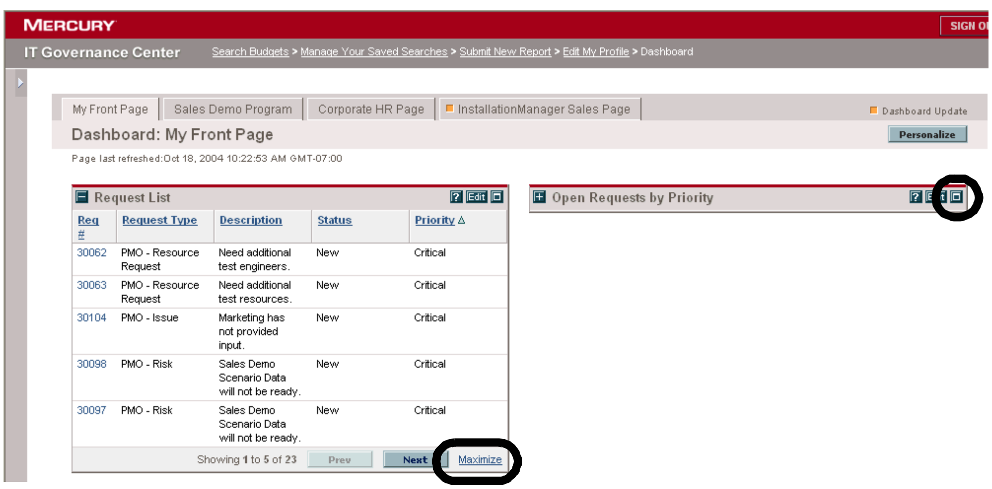
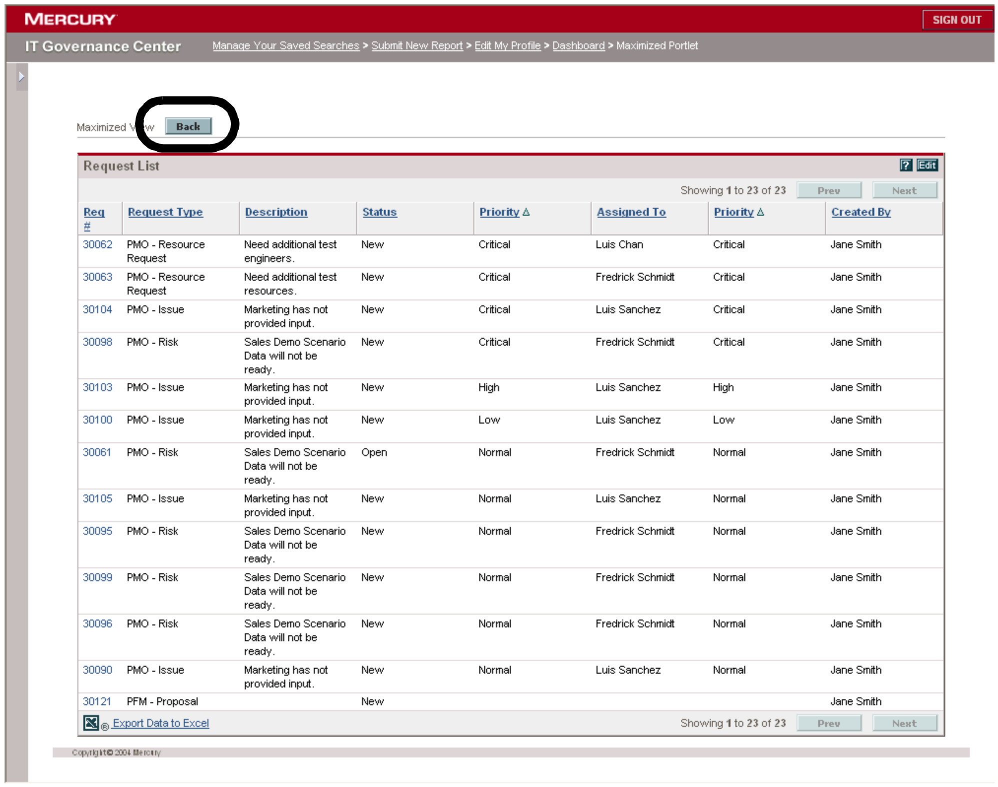


Figure 2-7. Portlet maximize icons



Req #	Request Type	Description	Status	Priority	Assigned To	Priority	Created By
30062	PMO - Resource Request	Need additional test engineers.	New	Critical	Luis Chan	Critical	Jane Smith
30063	PMO - Resource Request	Need additional test resources.	New	Critical	Fredrick Schmidt	Critical	Jane Smith
30104	PMO - Issue	Marketing has not provided input.	New	Critical	Luis Sanchez	Critical	Jane Smith
30098	PMO - Risk	Sales Demo Scenario Data will not be ready.	New	Critical	Fredrick Schmidt	Critical	Jane Smith
30103	PMO - Issue	Marketing has not provided input.	New	High	Luis Sanchez	High	Jane Smith
30100	PMO - Issue	Marketing has not provided input.	New	Low	Luis Sanchez	Low	Jane Smith
30061	PMO - Risk	Sales Demo Scenario Data will not be ready.	Open	Normal	Fredrick Schmidt	Normal	Jane Smith
30105	PMO - Issue	Marketing has not provided input.	New	Normal	Luis Sanchez	Normal	Jane Smith
30095	PMO - Risk	Sales Demo Scenario Data will not be ready.	New	Normal	Fredrick Schmidt	Normal	Jane Smith
30099	PMO - Risk	Sales Demo Scenario Data will not be ready.	New	Normal	Fredrick Schmidt	Normal	Jane Smith
30096	PMO - Risk	Sales Demo Scenario Data will not be ready.	New	Normal	Fredrick Schmidt	Normal	Jane Smith
30090	PMO - Issue	Marketing has not provided input.	New	Normal	Luis Sanchez	Normal	Jane Smith
30121	PFM - Proposal		New				Jane Smith

Figure 2-8. Portlet maximized view

Arranging Data in List Portlets

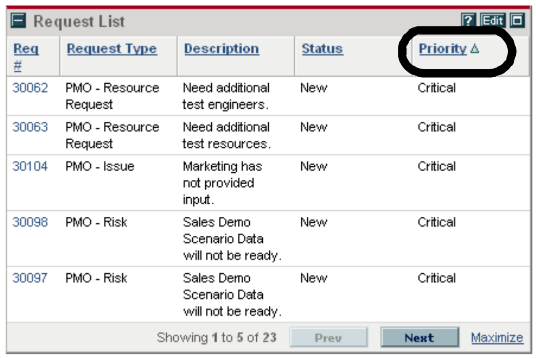
For list portlets, you can personalize the data gathered and the way the data is presented, using the portlet's edit page. However, you can temporarily change the way the data is presented using the portlet's **Sort** icon (see *Figure 2-9*).

- To move the **Sort** icon from column to column, click on a column's heading. The **Sort** icon will move to that column. The data displayed in the portlet will then be sorted by that column.

Once you have selected the sort column, you can then select the order of the sort. When the **Sort** icon points up, the data is sorted in alphanumeric order from lowest (0 or A) at the top to highest (9 or Z) on the bottom. When the **Sort** icon points down, the data is sorted in alphanumeric order from highest (9 or Z) at the top to lowest (0 or A) on the bottom.

- To change the order of the sort, click a column heading containing the **Sort** icon. The **Sort** icon toggles from pointing up to pointing down, or from pointing down to pointing up.

> Note
>
> Using the portlet's **Sort** icon to change the presentation of the data is valid only during the current Mercury IT Governance Center session.



Req #	Request Type	Description	Status	Priority
30062	PMO - Resource Request	Need additional test engineers.	New	Critical
30063	PMO - Resource Request	Need additional test resources.	New	Critical
30104	PMO - Issue	Marketing has not provided input.	New	Critical
30098	PMO - Risk	Sales Demo Scenario Data will not be ready.	New	Critical
30097	PMO - Risk	Sales Demo Scenario Data will not be ready.	New	Critical

Figure 2-9. Sort icon

Drilling Down from Portlets

Drill-down pages contain additional, detailed or background information concerning a linked entry. Some drill-down pages contain portlets, which have their own linked entries and their own drill-down pages.

- To drill down from a list portlet, click on a linked entry.

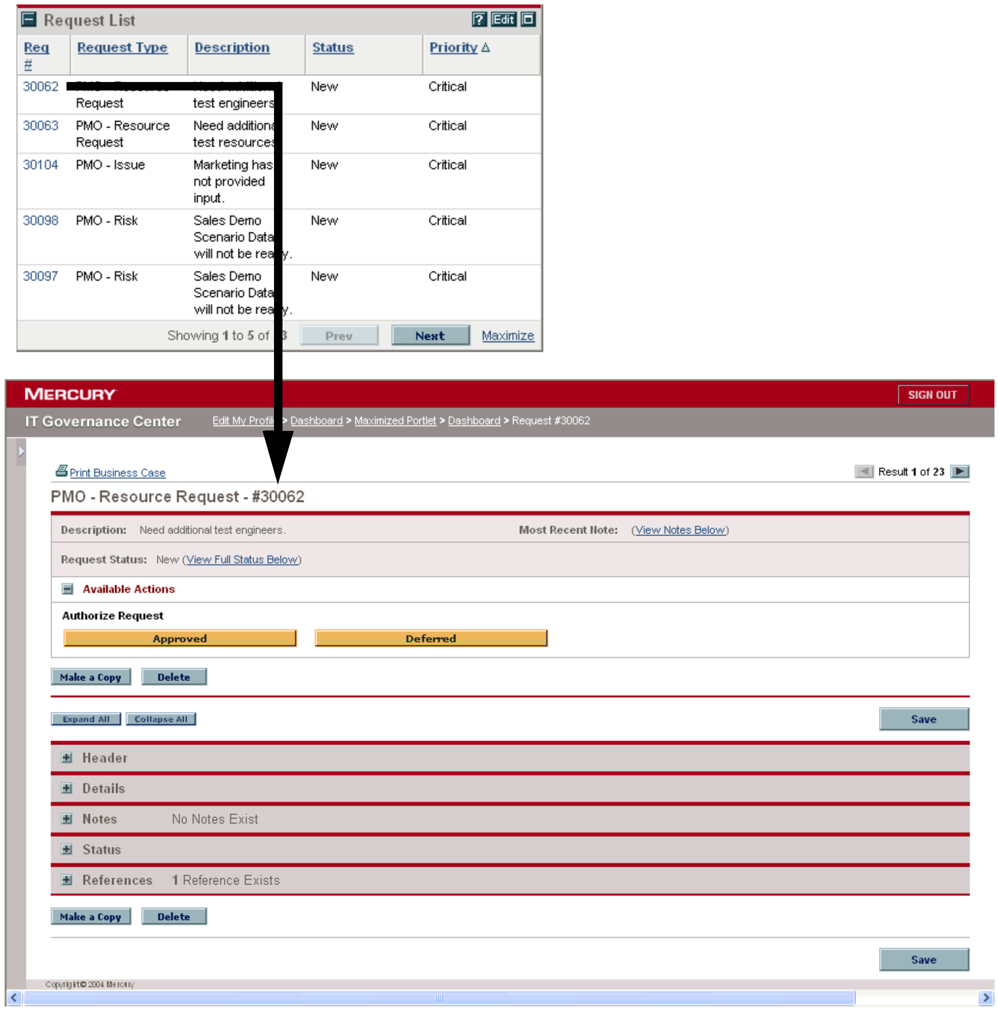


Figure 2-10. Drilling down from a list portlet

- To drill down from a chart portlet, click on a segment of the graph or legend.

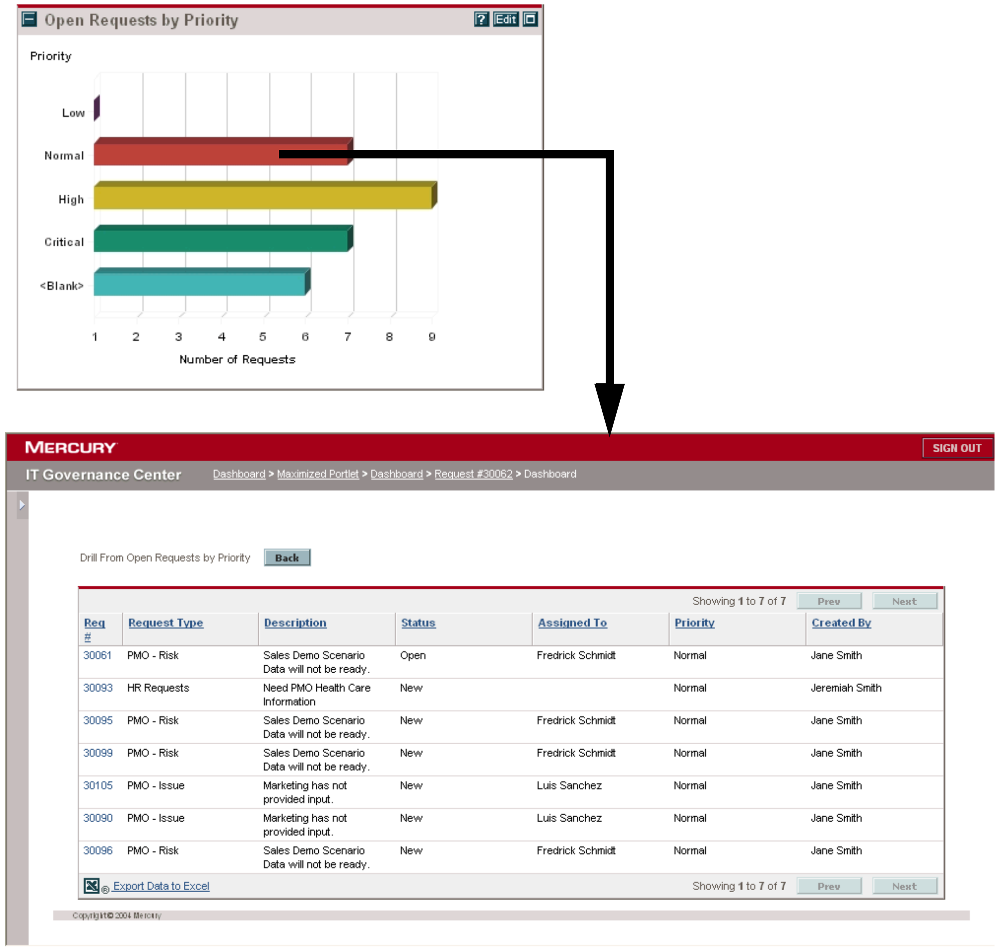


Figure 2-11. Drilling down from a chart portlet

Exporting Data to Excel Spreadsheets

Data on a list portlet’s maximized page can be exported to an Excel spreadsheet, if Microsoft Excel is installed on your system.

- To export data to an Excel spreadsheet, click the **Export Data to Excel** icon. A browser page is opened and the data is displayed in a Microsoft Excel spreadsheet. Once the data is imported into Microsoft Excel, all the standard Excel functions are available, including saving the file.

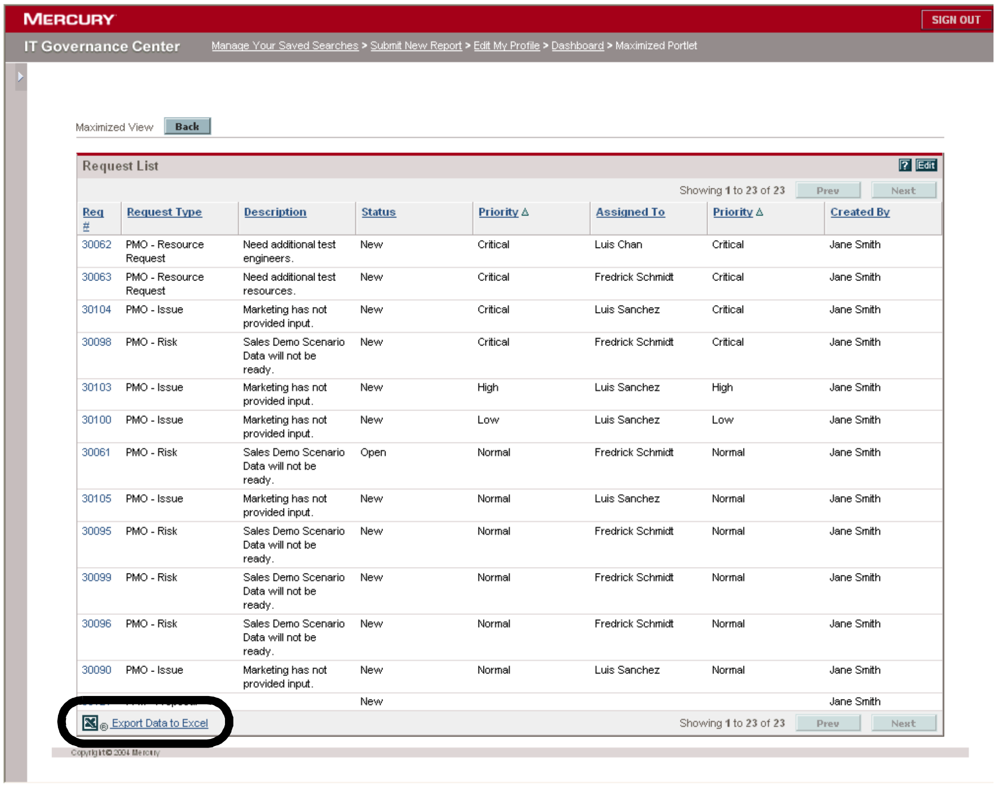


Figure 2-12. Exporting data to Excel

About Excel Exports

Data from a list portlet's maximized page is exported as-is. Excel translates the data into the various formats with a few exceptions. The following is a list of those exceptions:

- Red, yellow, and 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, commas, and periods.
- Links to URLs export but are altered to open in a new Web browser page (instead of the current Web browser page).

Personalizing Dashboards

Personalizing a Dashboard refers to making changes to your Dashboard and Dashboard pages. To personalize a Dashboard, you can do the following:

- Add Dashboard pages
- Move and delete Dashboard pages
- Rename Dashboard pages
- Set the refresh rate for Dashboard pages
- Add portlets to Dashboard pages
- Copy and move portlets on Dashboard pages

Adding Dashboard Pages

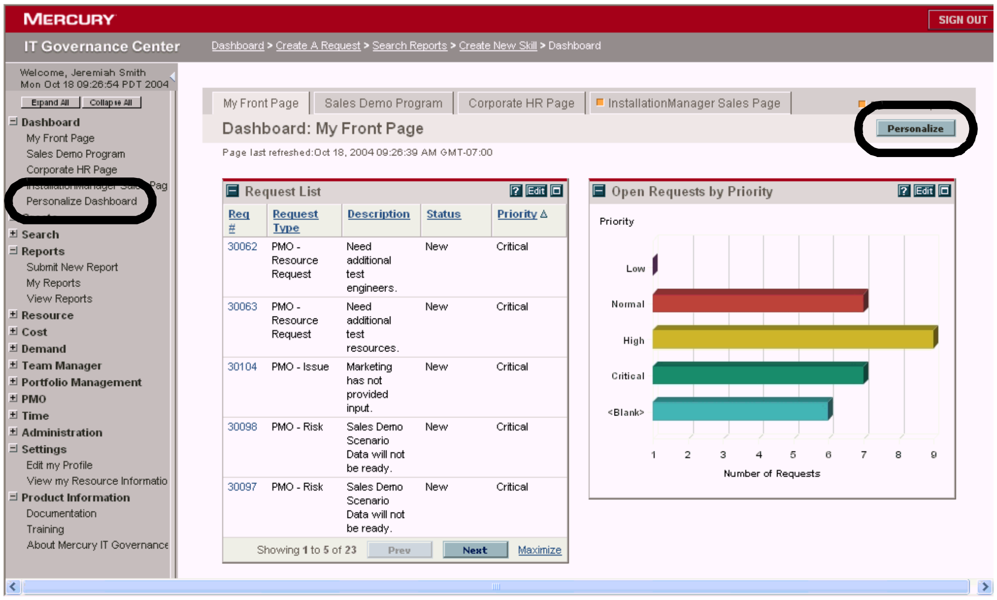
When adding Dashboard pages, you can add:

- Blank Dashboard pages
- Pre-configured Dashboard pages

To add a Dashboard page:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**

   You can also click the **Personalize** button on a Dashboard page. The Personalize Dashboard page displays.



3. Add a Dashboard page.

- To add a blank Dashboard page, on the Personalize Dashboard page, click **Add Blank Page.** A blank Dashboard page is added to your Dashboard.

- To add a pre-configured Dashboard page:

   a. On the Personalize Dashboard page, click **Add Pre-configured Pages.**

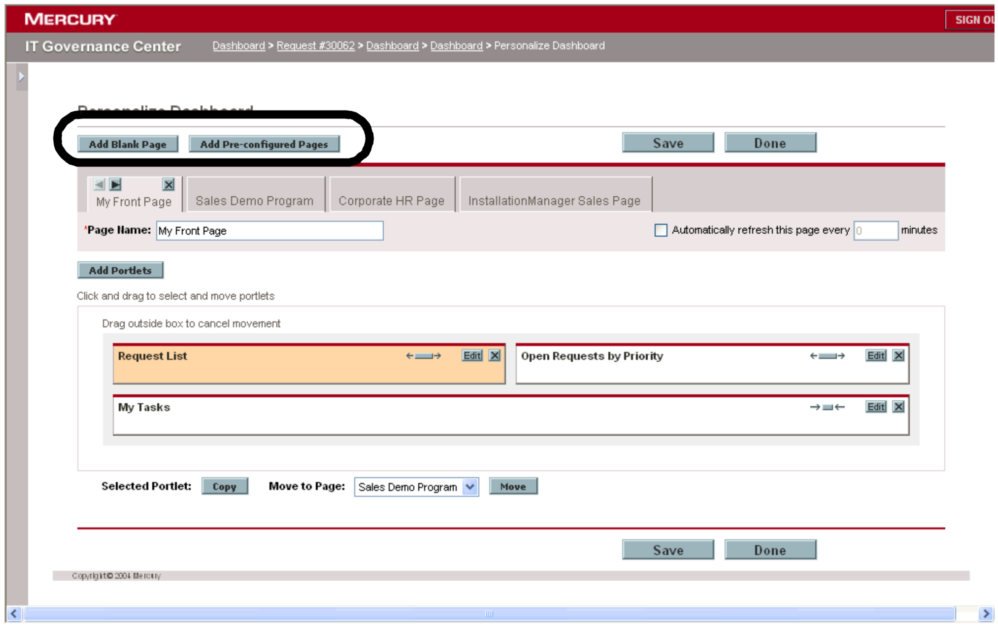
   A list of available pre-configured Dashboard pages is displayed.

   b. Select a pre-configured Dashboard page.

   The page is added to your Dashboard.

4. On the Personalize Dashboard page, click **Done.**

   The changes to your Dashboard are saved.



Moving and Deleting Dashboard Pages

To move or delete a Dashboard page:

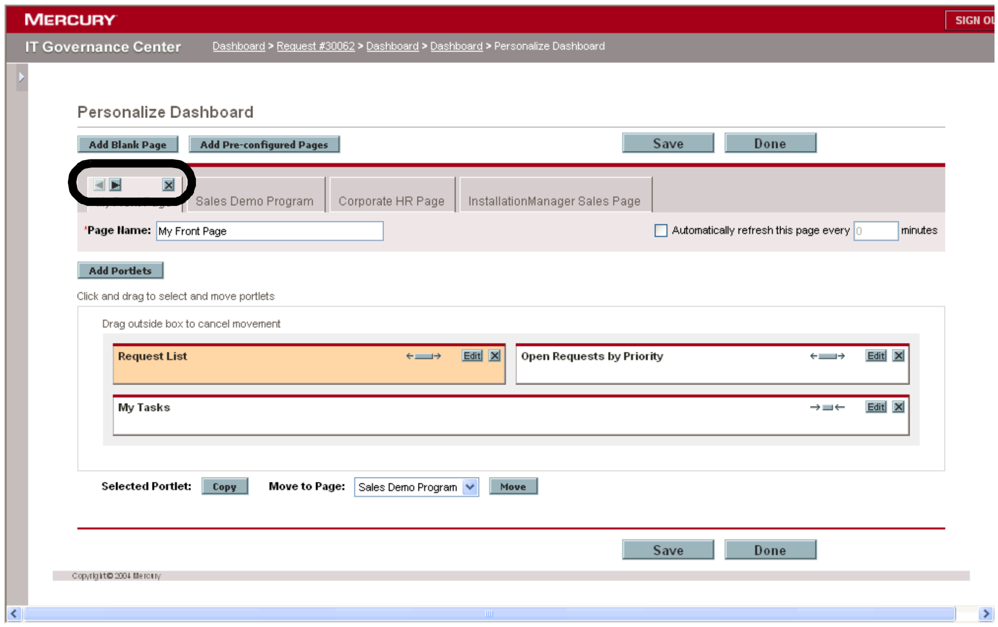
1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**

   You can also click the **Personalize** button on a Dashboard page. The Personalize Dashboard page displays.
3. Select the tab of the Dashboard page you want to move or delete.

   The selected Dashboard page is displayed in the Personalize Dashboard page. The **Delete** icon and the available **Move Arrow** icons are enabled for the Dashboard page.
4. Delete or move the Dashboard page.
   - To delete the Dashboard page, click the **Delete** icon. The Dashboard page is removed.
   - To move the Dashboard page, click one of the enabled **Move Arrow** icons. The Dashboard page is moved.

5. On the Personalize Dashboard page, click **Done.**

   The changes to your Dashboard are saved.



Renaming Dashboard Pages

To rename a Dashboard page:

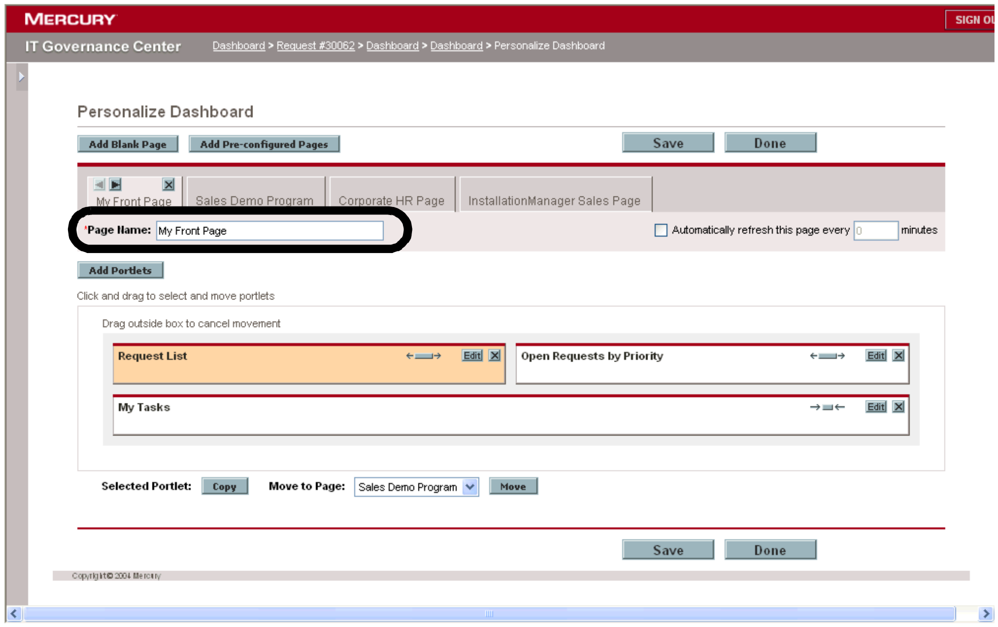
1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Dashboard > Personalize Dashboard.**

3. Select the tab of the Dashboard page you want to rename.

   The selected Dashboard page is displayed in the Personalize Dashboard page.

4. In the Personalize Dashboard page, in the Page Name field, enter the new name of the Dashboard page.



5. On the Personalize Dashboard page, click **Done.**

   The changes to your Dashboard are saved.

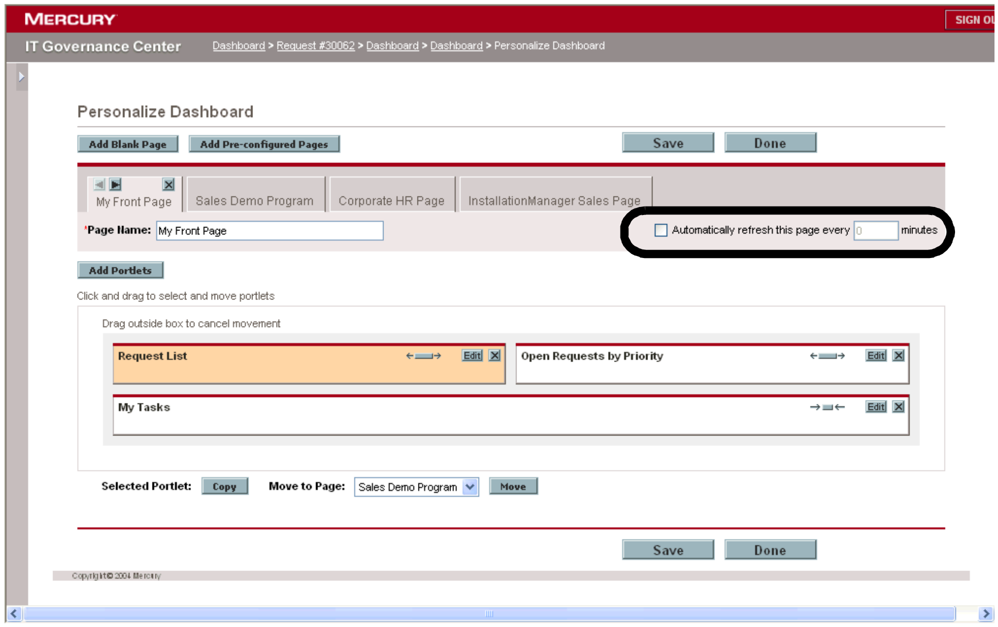
Setting Refresh Rates for Dashboard Pages

To set the refresh rate for a Dashboard page:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. Select the tab of the Dashboard page you want to configure.

   The selected Dashboard page is displayed in the Personalize Dashboard page.
4. In the Automatically refresh this page every minutes field, select the checkbox and enter the number of minutes.

   The number entered in the field must be a whole number.



5. On the Personalize Dashboard page, click **Done.**

   The changes to your Dashboard are saved.

Adding Portlets to Dashboard Pages

To add portlets:

1. Log on to Mercury IT Governance Center.

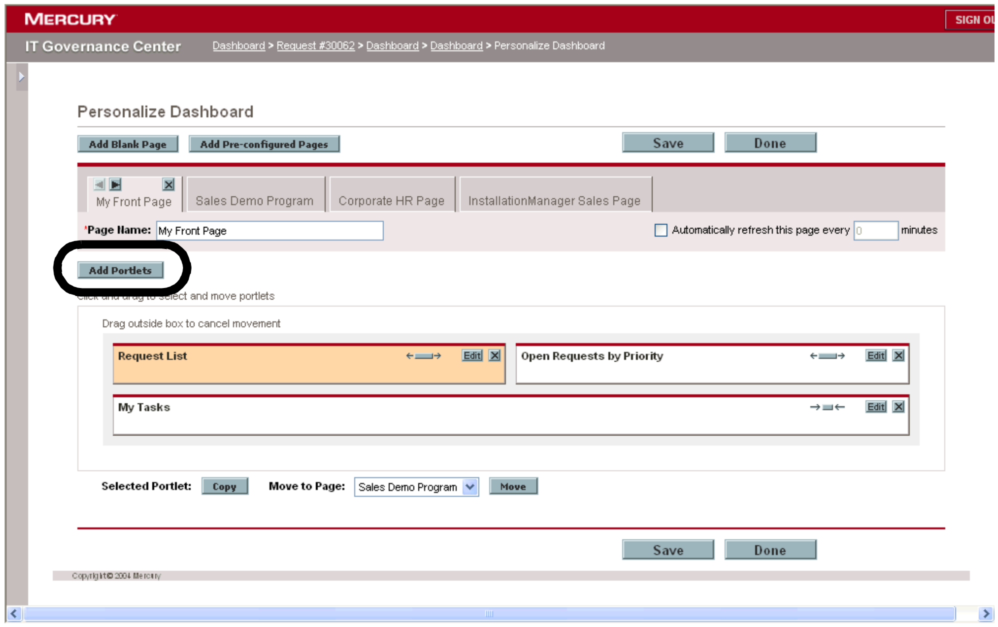
2. From the menu bar, select **Dashboard > Personalize Dashboard.**

3. Select the tab of the Dashboard page you want to configure.

   The selected Dashboard page is displayed in the Personalize Dashboard page.

4. On the Personalize Dashboard page, click **Add Portlets.**

   The Add Portlets to Dashboard Page opens.



5. Search for the portlets to add.

- To list all of the portlets, click **Find Portlets.** The Select Portlets to Add section is added to Add Portlets to Dashboard Page. The Select Portlets to Add section lists all of the portlets.

- To list specific portlets:

a. In Portlet Name, enter all or part of the portlet's name.

b. In Category, select the portlet's category from the drop-down list.

c. Click **Find Portlets.**

The Select Portlets to Add section is added to Add Portlets to Dashboard Page. The Select Portlets to Add section lists all of the portlets matching the search criteria.

6. In the Select Portlets to Add section, select one or more portlets and click **Add.**

The selected portlets are added to the Dashboard page.

7. On the Personalize Dashboard page, click **Done.**

The changes to the Dashboard are saved.

Copying and Moving Portlets on Dashboard Pages

To copy and move portlets:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Dashboard > Personalize Dashboard.**

3. Select the tab of the Dashboard page you want to configure.

   The selected Dashboard page is displayed in the Personalize Dashboard page.

4. Select the portlet you want to copy or move.

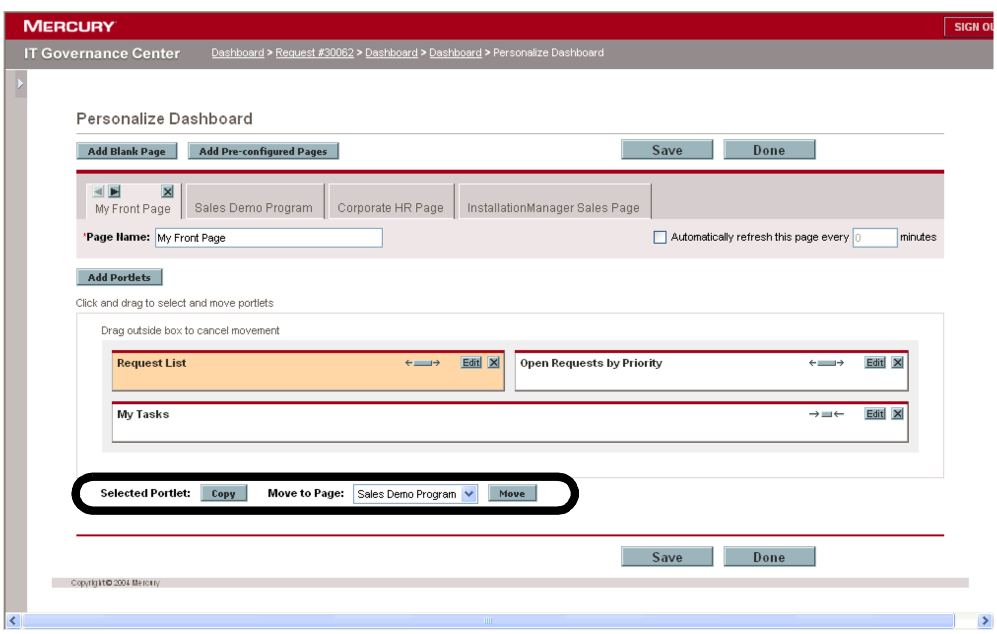
   The portlet is highlighted.

5. Copy or move the portlet.

   - To move the portlet around on the same Dashboard page, hold the cursor down on the portlet and move the portlet to its new location (drag and drop).

   - To move the portlet to another Dashboard page, in Move to Page, select the name of the destination Dashboard page and click **Move.**

   - To copy the portlet, click **Copy.**



6. On the Personalize Dashboard page, click **Done.**

   The changes to your Dashboard are saved.

Personalizing Portlets

Personalizing portlets refers to making changes to your portlets. This includes the following:

- Deleting portlets
- Changing the size of portlets
- Setting the content and display of portlets

Deleting Portlets

To delete portlets:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. Select the tab of the Dashboard page you want to configure.

   The selected Dashboard page is displayed in the Personalize Dashboard page.
4. On the portlet you want to delete, click the **Delete** icon.

   The portlet is deleted.

5. On the Personalize Dashboard page, click **Done.**

   The changes to the Dashboard are saved.

Changing the Size of Portlets

Portlets come in two sizes:

- **Wide.** One portlet per row.
- **Narrow.** Two portlets per row.

To change the width of portlets:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. Select the tab of the Dashboard page you want to configure.

   The selected Dashboard page is displayed in the Personalize Dashboard page.

4. Change the size of the portlet.
   - On narrow portlets, click the **Portlet Wide** icon.

   - On wide portlets, click the **Portlet Narrow** icon.

5. On the Personalize Dashboard page, click **Done.**

   The changes to the Dashboard are saved.

Configuring Portlets

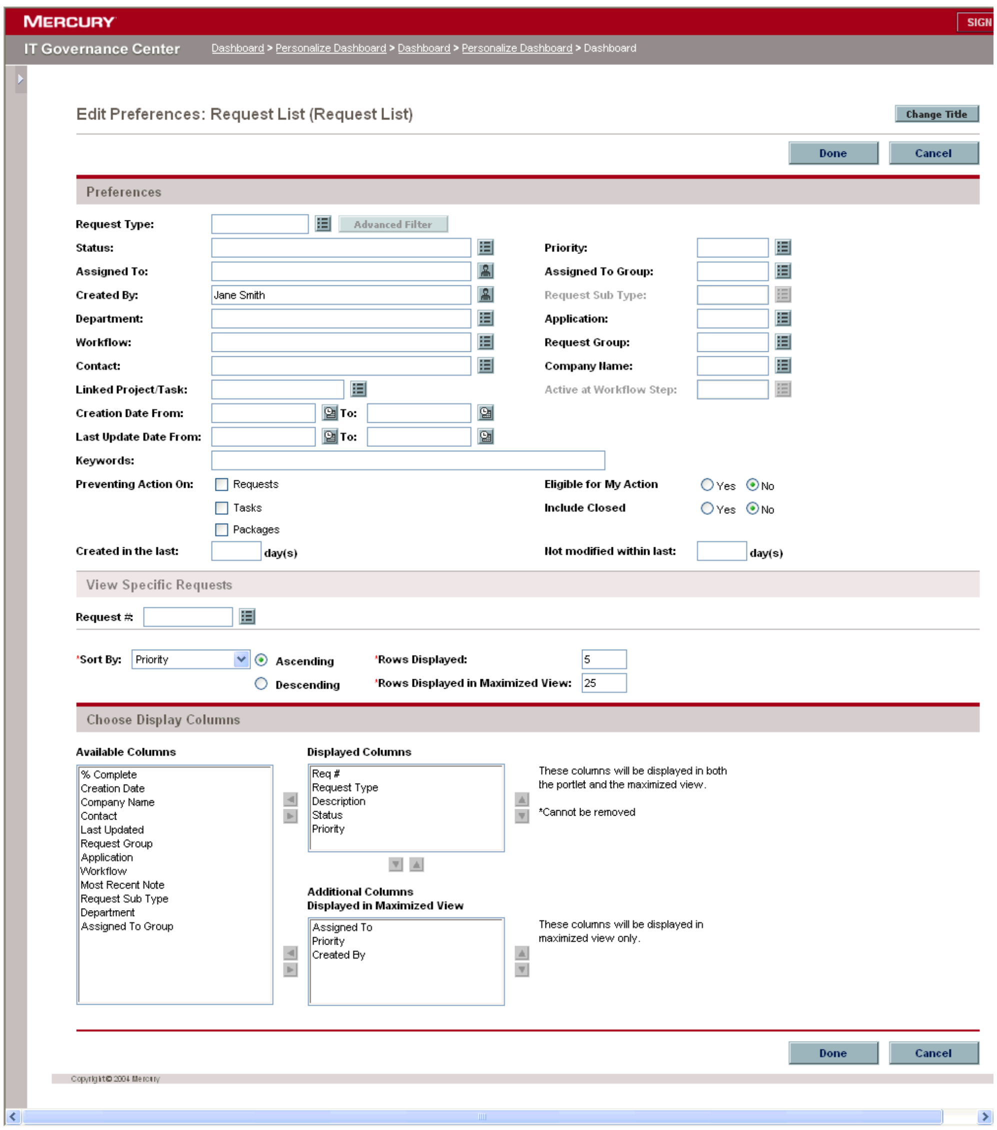
You can configure your portlets, both in terms of data content and in terms of the display of the data. Use a portlet's edit page to personalize a portlet to best fit your business needs.

To configure a portlet:

1. Log on to Mercury IT Governance Center.

2. On the portlet, click the **Edit** icon.

   The portlet's edit page displays.



3. Personalize your portlet.

   Each portlet is unique. All portlets have a portlet edit page but not all portlets have all of the listed sections. For example, chart portlets do not have a Choose Display Columns section. The following lists the different ways you can personalize your portlet:

   - **Title.** You can change the name of the portlet. Click **Change Title** to open the Change Title page.
   - **Preferences.** You can configure the filters that are used to capture and display the data you want. Select the filters that best fit your business need.
   - **Choose display columns.** You can configure how to display the data in the portlet. The Available Columns field lists all of the columns available to be displayed but not chosen. The Displayed Columns field lists all columns the will be displayed in the portlet's normal view. The Additional Columns Displayed in Maximize View field lists the additional columns that will be displayed in the portlet's maximized view. To move entries between fields, select an entry and click one of the enabled **Move Arrow** icons.
   - **Display options.** You can configure how to display the data. Select the options that best suit your business need.
   - **Arrange data.** You can configure how to display the data. Select the options that best suit your business need.

4. In the portlet edit page, click **Done.**

   The changes to the portlet are saved.

Chapter 3
Using the Workbench

In This Chapter:

- *Overview of the Workbench*
- *Opening and Closing the Workbench*
- *Searching for Entities*
  - *Saved Queries*
  - *Case Sensitivity and Using Wildcards*
  - *Advanced Queries*
  - *Opening, Deleting, and Copying Entities*
  - *Selecting Configuration Entities*
  - *Creating New Entities*
- *Navigating Inside Workbenches*

Overview of the Workbench

For most Mercury IT Governance Center users, tasks are started and completed in the standard interface; some users, however, need to use the Mercury IT Governance Workbench for their work. The Workbench is designed to help application administrators, advanced users, and configurators configure Mercury IT Governance Center. The Workbench is also used to create a few entities, such as packages and projects. *Figure 3-1* shows the Workbench.

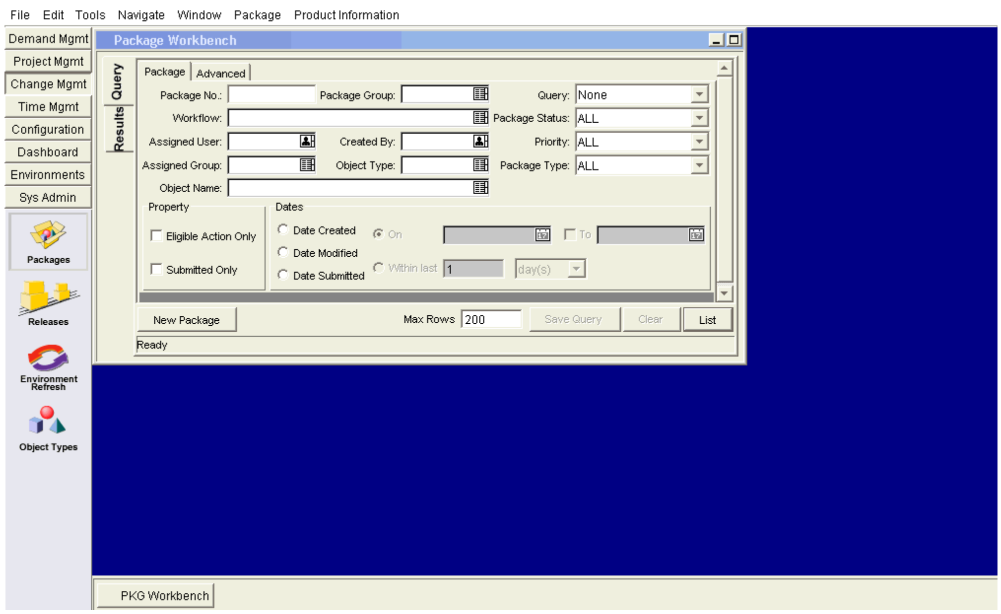


Figure 3-1. Mercury IT Governance Workbench

The Workbench opens in its own window, not in a Web browser window. You can open the Workbench through the standard interface's **Administration > Open Workbench** menu item, or you might reach the Workbench by creating packages or creating and updating projects.

The Mercury IT Governance Workbench has the following components (see *Figure 3-2*):

- **Workbench.** Workbench is used to find and act on configuration entities, such as request types, object types, and workflows. Each configuration entity has its own unique Workbench. You can reach a configuration entity Workbench using the shortcut bar.

- **Shortcut bar.** The shortcut bar is used to organize the configuration entity Workbenches. Each configuration entity Workbench belongs to a screen group, such as Demand Mgmt, Project Mgmt, or Configuration. When a screen group is selected, the associated Workbenches are displayed as icons in the shortcut bar (see *Figure 3-2*).

- **Workbench menu.** The Workbench menu provides configuration functionality to the Workbench. This includes such things as user profile settings and regional settings. In addition, some Workbenches, such as packages and projects, add an extra menu when that Workbench is selected.

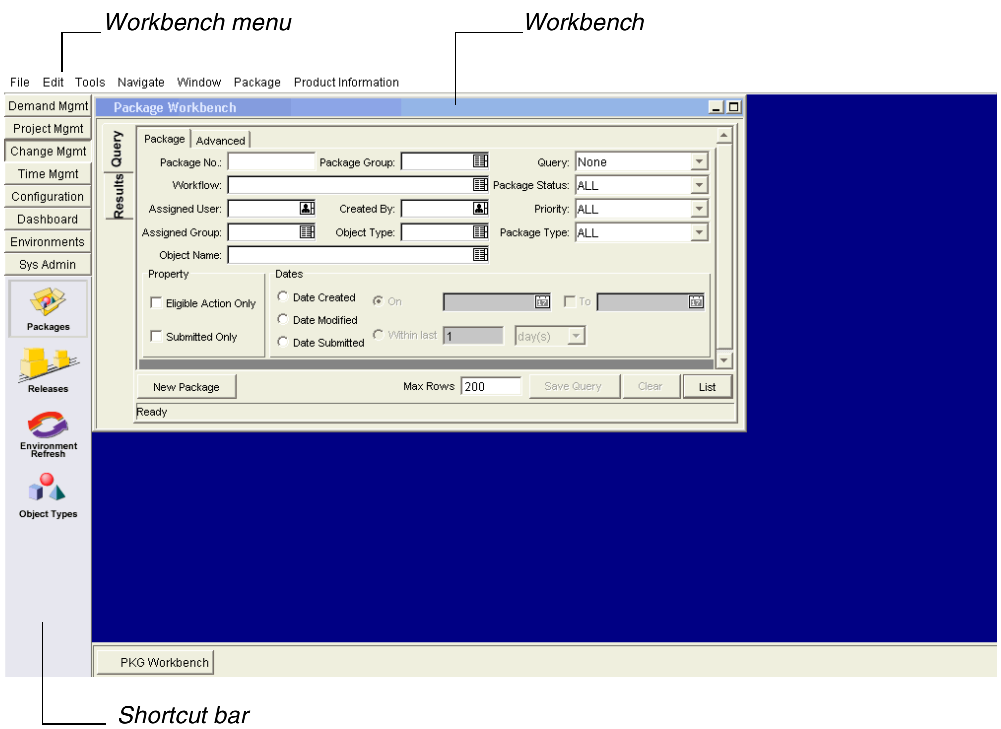


Figure 3-2. Mercury IT Governance Workbench

Opening and Closing the Workbench

The Workbench is accessed through the standard interface.

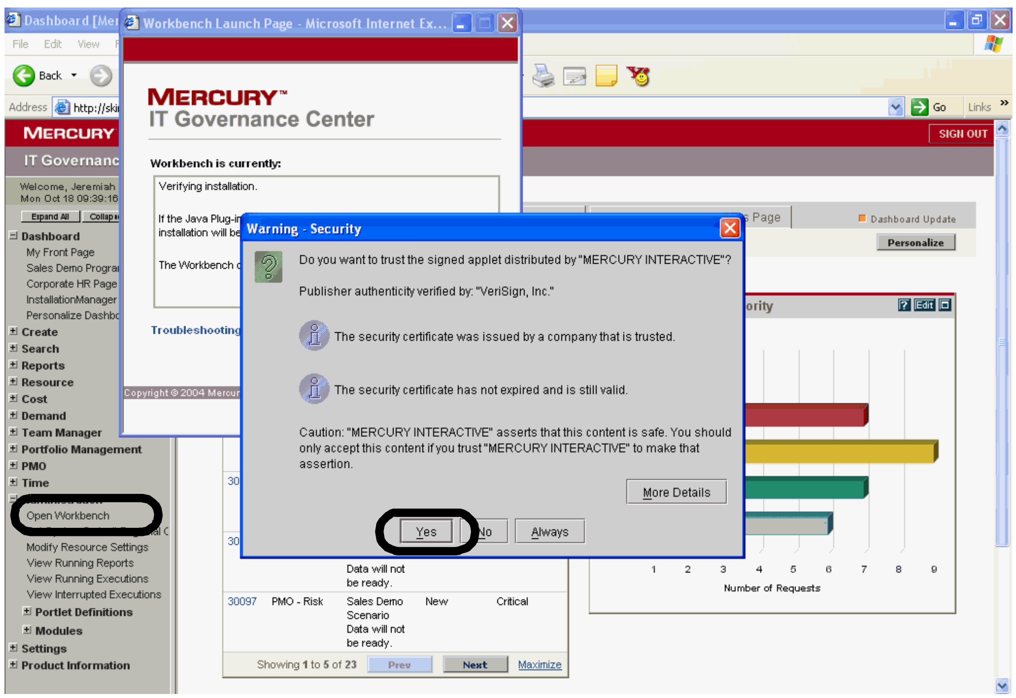
To open the Workbench:

1. Log on to Mercury IT Governance Center.

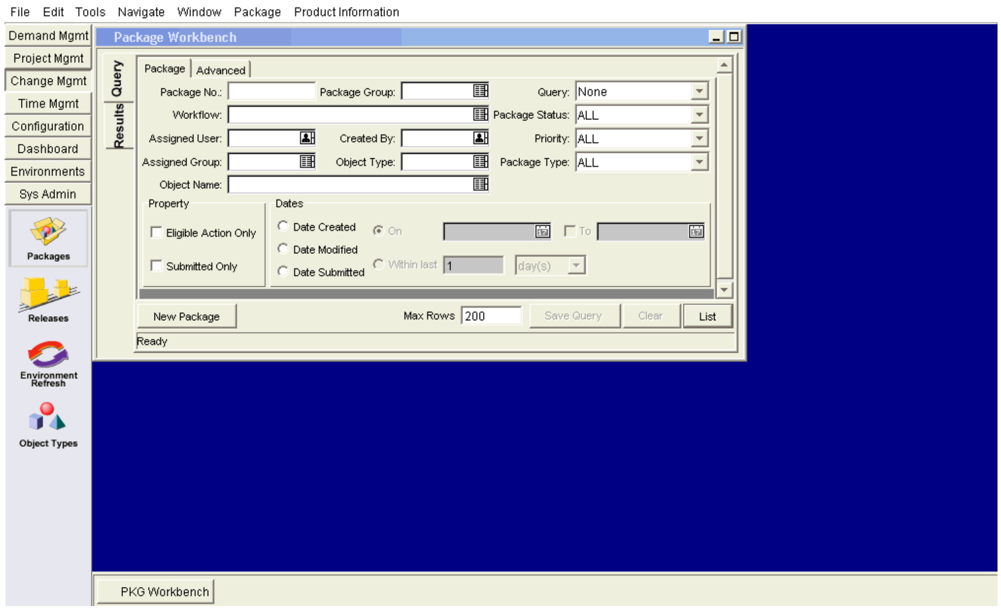
2. From the menu bar, select **Administration > Open Workbench.**

   A Workbench status window opens. A few minutes later, the Warning-Security window opens.

3. In the Warning Security window, select **Yes.**



The Workbench opens.



To close the Workbench:

1. From the **Workbench** menu, select **File > Exit.**

   The Workbench closes.

Searching for Entities

The Workbench opens the default configuration entity Workbench (typically, the Package Workbench). A configuration entity Workbench gives you an interface to search for a specific entity, such as the Enhancement request type. To search for an entity, enter criteria in any combination of the fields in the **Query** tab and click **List.** All entities matching the search criteria will be listed in the **Results** tab. You can choose to ignore the filter fields and simply click **List**, which returns all of the entities in the Workbench.

Saved Queries

Queries that are run frequently can be saved and re-run using the saved query functionality. When saving a query, the saved query is only available to the configuration entity Workbench where you created the saved query. For example, a saved query in the Request Type Workbench is not available in the Packages Workbench.

Creating Saved Queries

To create a saved query:

1. Open the Workbench.
2. Select the configuration entity Workbench.

   The configuration entity Workbench opens with the **Query** tab.

3. In the **Query** tab, enter the search criteria and click **Save Query.**

   The Save Query window opens.

4. In the Save Query window, in Query Name, enter a unique query name for the query and click **Save.**

   The query is saved.

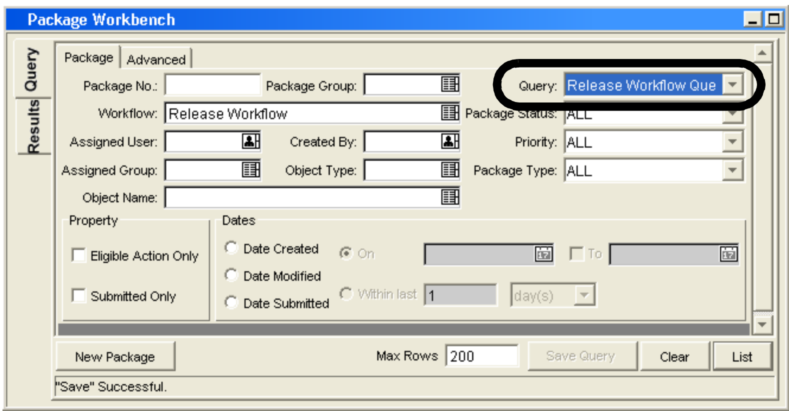
Using Saved Queries

To use a saved query:

1. Open the Workbench.
2. Select the configuration entity Workbench.

   The configuration entity Workbench opens with the **Query** tab.

3. In the **Query** tab, from the Query field drop-down list, select a saved query name and click **List.**



   The query is run with the parameters of the saved search query.

Deleting Saved Queries

To delete a saved query:

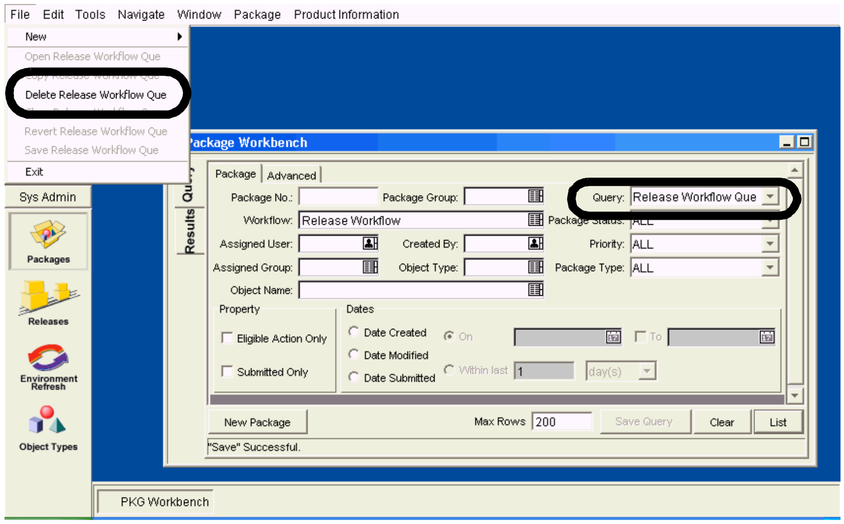
1. Open the Workbench.
2. Select the configuration entity Workbench.

   The configuration entity Workbench opens with the **Query** tab.

3. In the **Query** tab, from the Query field drop-down list, select a saved query name.

   The selected saved query is highlighted.

4. From the Workbench menu, select **File > Delete <*Query*>** where **<*Query*>** is the name of the query to delete.



A Question Dialog opens.

5. In the Question Dialog, click **Yes.**

The saved query is deleted.

Case Sensitivity and Using Wildcards

Filter fields are case insensitive. For example, entering the word **test** in a filter field would return test, TEST, and Test. Filter fields also return partial matches. For example, entering the word **test** in a filter field could return Test Project and Testing Project.

Filter fields also accept the wildcard character **%**, which matches against any character. For example, entering **%ample** in a filter field could return Example and Sample. However, simply entering **ample** in a filter field would not return Example and Sample.

Advanced Queries

The Package Workbench **Query** tab includes the **Advanced** tab, where you can enter complex search criteria for packages (see *Figure 3-3*).

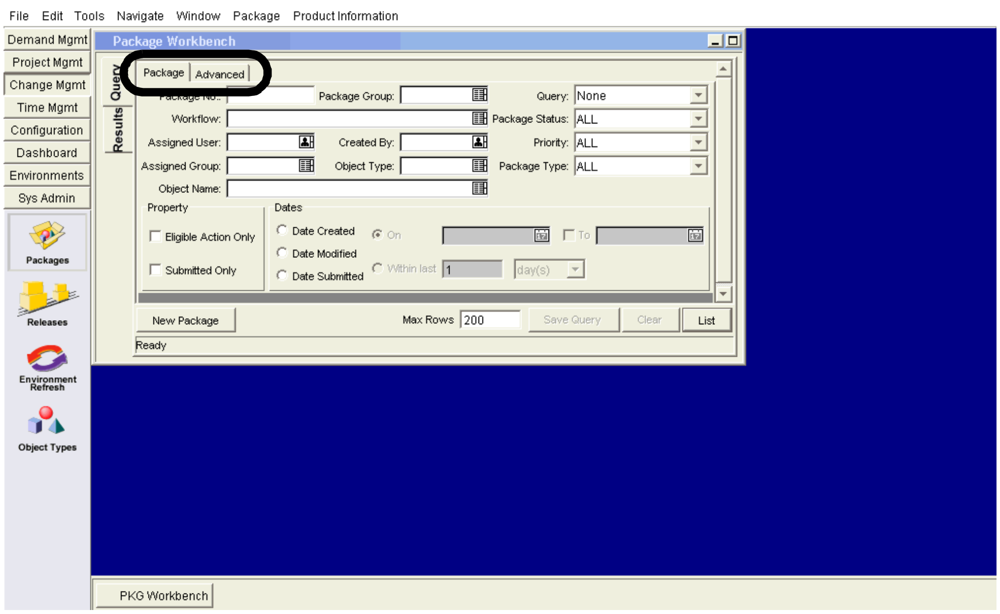


Figure 3-3. Package Workbench

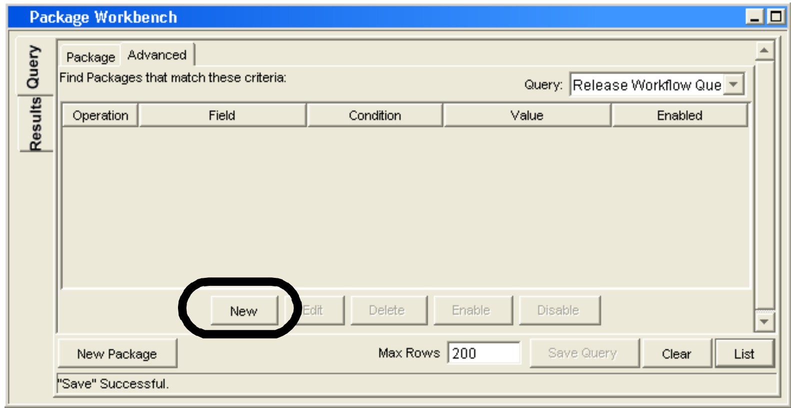
To enter advanced query criteria:

1. Open the Workbench.
2. Select the Package Workbench.

   The Package Workbench opens with the **Query** tab. The **Package** tab of the **Query** tab is displayed.

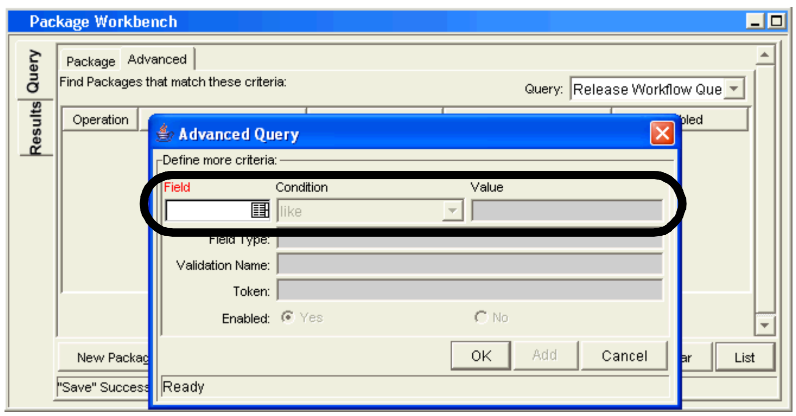
3. In the **Package** tab, complete the search criteria and click the **Advanced** tab.

   The **Advanced** tab opens.



4. In the **Advanced** tab, click **New.**

   The Advanced Query window opens.

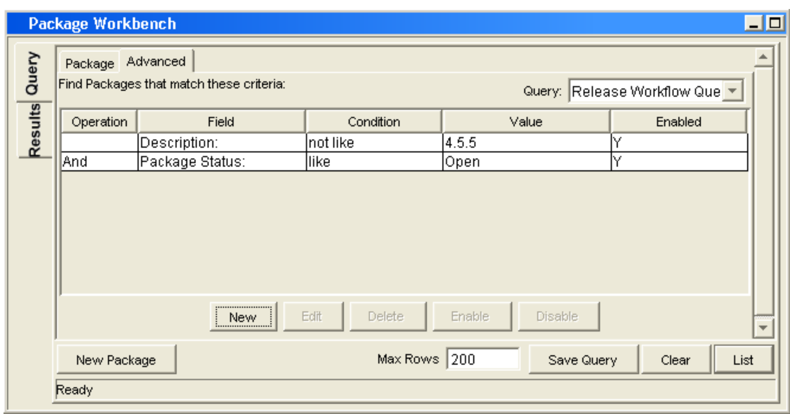


5. In the Advanced Query window, complete the filter fields and click **Add.**

   See *Table 3-1* for the list of conditions. The advanced query logic is added to the query.

Table 3-1. Boolean operators

Condition	Description
Like	Looks for close matches of the value to the contents of the selected field.
Not like	Looks for contents in the selected field which are not close matches to the value field.
Equal to	Looks for an exact match of the value to the contents of the selected field.
Not equal to	Returns all results which are not an exact match of the value to the contents of the selected field.
Is null	Returns all instances in which the selected field is blank.
Is not null	Returns all instances in which the selected field is not blank.
Greater than	Looks for a numerical value in excess of the value entered in the Value field.
Less than	Looks for a numerical value below the value entered in the Value field.
Greater than equal to	Looks for a numerical value in excess or the same as the value entered in the Value field.
Less than equal to	Looks for a numerical value below or the same as the value entered in the Value field.



6. In the **Advanced** tab, click **List.**

   The search begins. When performing the search, Mercury IT Governance Center uses the search criteria specified on the **Package** tab. All matches are then filtered using the search criteria specified on the **Advanced** tab. Only packages matching all of the filter fields are displayed in the **Results** tab. If no matches are returned, you could be less restrictive by disabling or removing some of the search criteria.

Selecting Configuration Entities

The **Results** tab displays all of the configuration entities matching the search criteria. The results can be sorted on any of the fields by clicking the column header. In the **Results** tab, select any of the returned configuration entities (or a range of configuration entities) for viewing, copying, or modifying (see *Figure 3-4*).

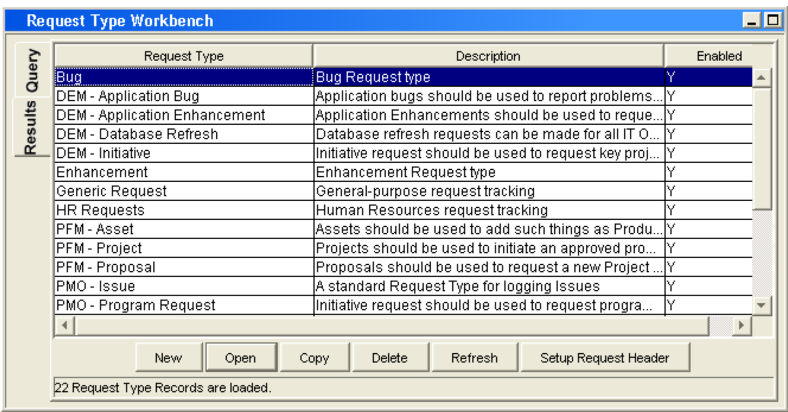


Figure 3-4. Results tab

To select a contiguous group of configuration entities:

1. Open the Workbench.

2. Select the configuration entity Workbench.

3. In the **Query** tab, enter the search criteria and click **List.**

   The results are displayed in the **Results** tab.

4. In the **Results** tab, select one entity.

   The entity is highlighted.

5. Hold down the **Shift** key and select another entity.

   All of the entities between the two select entities are highlighted.

6. Click **Open** or **Delete.**

   All of the highlighted entities are opened or deleted.

To select several separated entities:

1. Open the Workbench.
2. Select the configuration entity Workbench.
3. In the **Query** tab, enter the search criteria and click **List.**

   The results are displayed in the **Results** tab.

4. In the **Results** tab, select one entity.

   The entity is highlighted.

5. Hold down the **Ctrl** key and select another entity.

   Both of the selected entities are highlighted.

6. Click **Open** or **Delete.**

   Both of the highlighted entities are opened or deleted.

The **Results** tab also provides buttons for executing other common tasks. From the **Results** tab, users can create **New** entities, **Open**, **Copy,** or **Delete** existing entities, or re-run the query by clicking **Refresh.**

Opening, Deleting, and Copying Entities

To open, delete, or copy an entity:

1. Open the Workbench.
2. Select the configuration entity Workbench.
3. In the **Query** tab, enter the search criteria and click **List.**

   The results are displayed in the **Results** tab.
4. In the **Results** tab, select an entity.

   The entity is highlighted.
5. Open, delete, or copy the entity.
   - To open the entity, in the **Results** tab, click **Open.**
   - To delete the entity, in the **Results** tab, click **Delete.** A question dialog opens, asking if you want to delete the entity.
   - To copy the entity, in the **Results** tab, click **Copy.** A copy dialog window opens, asking for a name for the new (copied) entity.

Creating New Entities

To create a new entity:

1. Open the Workbench.
2. Select the configuration entity Workbench.
3. In the **Query** tab, click **New <*Entity_Type*>**, where **<*Entity_Type*>** is the type of entity, such as **New Package.**

   The entity's detail window opens.
4. In the detail window, complete the fields as required and click **OK.**

   The entity is created.

Navigating Inside Workbenches

In a Workbench, the shortcut bar is typically used to navigate to a configuration entity Workbench. You can also navigate the Workbench using the Navigate menu on the Workbench menu.

Every Workbench has a **Query** tab, which is used to search Mercury IT Governance Center for entities associated to the Workbench. The results of a **Query** tab search are listed in the Workbench's **Results** tab. Toggle between the **Query** tab and **Results** tab using the tabs in the upper-left corner of the Workbench (see *Figure 3-5*).

When multiple detail windows are open, an individual detail window can be accessed using the buttons at the bottom of the Workbench, as shown in *Figure 3-5*. If you minimize a detail window, or even the Workbench window, you can view the window by clicking the appropriate button at the bottom of the Workbench.

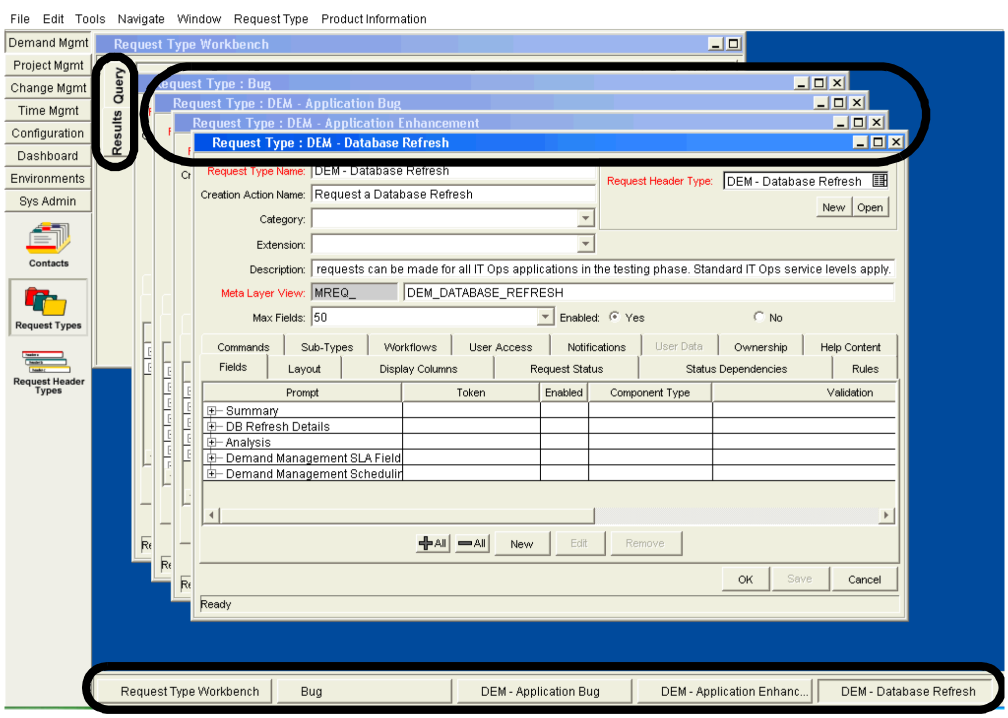


Figure 3-5. Navigating between multiple open detail windows

Index

A

access grants 19
adding
  Dashboard pages 58
  portlets 63
advanced Workbench queries 79

C

changing
  cost display setting 48
  passwords 46
  portlet name 69
  portlet sizes 67
chart portlets 18
closing the Workbench 74
collapsing menus 34
configuration-level restrictions 20
copying
  portlets 65
  Workbench entities 84
creating
  entities 36
  saved search categories 42
  saved searches 40
  saved Workbench queries 76
  Workbench entities 84

D

Dashboard
  definition 15
  personalizing 58
Dashboard pages
  adding 58
  adding portlets 63
  default 17
  definition 16
  deleting 60
  moving 60
  opening 51
  renaming 61
  setting refresh rates 62
deleting
  Dashboard pages 60
  entities 84
  portlets 66
  saved queries 77
  saved search categories 42
  saved searches 41
distributed Dashboard pages 17

E

entities
  copying Workbench entities 84
  creating 36

creating in Workbench 84
deleting 84
opening 84
searching 76

entity-level restrictions 19

executive scenarios 20

expanding menus 34

exporting data to spreadsheets 56

F

field-level restrictions 20

L

licenses 19

list portlets 18

logging
off standard interface 34
on standard interface 32

M

management scenarios 21

managing
saved search categories 42
saved searches 41

menu bar
definition 16
displaying 35
hiding 35

menus
collapsing 34
expanding 34

moving
Dashboard pages 60
portlets 65
saved search categories 42

N

navigation path 16

O

opening
Dashboard pages 51
entities 84
existing reports 45
Workbench 74

P

personalizing
Dashboard 58
portlets 66

portlets
adding to Dashboard pages 63
arranging list portlets 53
changing widths 67
configuring 68
copying 65
deleting 66
drilling down 54
exporting data 56
maximized view 52
minimized view 51
moving 65
normal view 51
personalizing 66
setting maximized view 47
setting portlet views 51

pre-configured Dashboard pages 17

processes and related documents 25

published Dashboard pages 17

Q

queries
advanced Workbench queries 79
boolean operators 80
case sensitive fields 78
creating saved Workbench queries 76
deleting saved Workbench queries 77
saving 76
using saved Workbench queries 77
wildcard characters 78

R

related documents
- lists 14
- processes 25
- roles 25

renaming
- Dashboard pages 61
- portlets 69

reports
- opening existing reports 45
- running new reports 44

roles and related documents 25

S

scenarios
- executive examples 20
- management examples 21
- user examples 23

searches
- advanced Workbench queries 79
- creating saved search categories 42
- creating saved searches 40
- creating saved Workbench queries 76
- deleting saved searches 41
- deleting saved Workbench queries 77
- entities 76
- managing saved search categories 42
- managing saved searches 41
- moving saved search categories 42
- running saved searches 39
- running searches 39
- using saved Workbench queries 77

security
- access grants 19
- accessing Mercury IT Governance Center 19
- configuration-level restrictions 20
- entity-level restrictions 19
- field-level restrictions 20
- licenses 19
- security groups 19

setting refresh rates 62

standard interface
- definition 15
- logging off 34
- logging on 32

U

user scenarios 23

V

viewing
- documentation 49
- product information 49
- user access information 50
- version 50

W

Workbench
- closing 74
- definition 72
- navigating 85
- opening 74