Mercury IT Governance Center™
Key Concepts

Version: 6.0

MERCURY™

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

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Introduction

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About This Document

This document provides an introduction to the key concepts important in installing, upgrading, configuring, maintaining, and using Mercury IT Governance Center™, a set of products used by CIOs and IT executives to govern and manage the people, projects, and processes required to run an IT organization like a business.

What This Document Contains

This document contains:

- An overview of Mercury IT Governance Center and the Mercury IT Governance Center products

- The key concepts important in understanding and using Mercury IT Governance Center, which are presented as an alphabetic listing of topics

  Each key topic may include the following information (depending on its relevance to the concept being discussed):

  - The definition of the topic and its relevance to the Mercury IT Governance Center

  - The application or applications (for example, Mercury Demand Management™) for which the topic is most relevant

  - The audience (for example, database administrators) who might be most interested in reading about the topic

  - Illustrations of the topic in the form of a diagrams, screenshots, or examples

  - Access information (for example, information about how to access the Mercury IT Governance Center product documentation, or how to access the Mercury IT Governance Workbench)

  - Usage information, including best practices

  - Sample tasks related to the topic, along with navigational information to help you find the pages, screens, or windows where the tasks are performed

  - Subtopics closely related to the major topic

- "See Also" sections that link you directly to related topics within this document

- "For More Information" sections that direct you to Mercury IT Governance Center product documentation and other sources of additional information

How This Document Relates to Others in the Documentation Set

Other documents in the Mercury IT Governance Center documentation set presume that users have a basic understanding of the key concepts in this book. You can gain this kind of basic knowledge from reading this document, completing Mercury IT Governance Center online tutorials, taking Mercury IT Governance Center formal training courses, practical experience using Mercury IT Governance Center products, or from a combination of these sources and methods.

The amount of knowledge and prior experience required to do specific tasks using Mercury IT Governance Center products varies with the nature of the task. For more information about audience levels, knowledge and experience levels, documentation, and product descriptions, see the *Guide to Documentation*.

What This Document Does Not Provide

This book is not a tutorial or training manual; you can use it to gain some understanding about Mercury IT Governance Center, but used by itself it can't teach you how to use Mercury IT Governance Center.

To gain basic hands-on product experience, you might want to consider taking a Mercury-sponsored training course. Mercury provides a complete training curriculum for Mercury IT Governance Center. For more information, see:

- **Product Information > Training** in the Mercury IT Governance Center standard interface

- The Mercury Education Services Web site, located at:

  www.merc-training.com/main/index.cfm

Who Should Read This Document

This book is for all users of Mercury IT Governance Center:

- End users

- Application administrators

- Application developers or configurators

- System or instance administrators

- Database administrators

For More Information

For information about audience types, see the *Guide to Documentation*.

Related Documents

The topics in Chapter 2, *Key Concepts,* on page 25, contain frequent references to documents that are part of the Mercury IT Governance Center documentation set. These referenced documents provide more detailed information about the topics introduced here.

For information about how to access the Mercury IT Governance Center documentation set, see *Documentation* on page 72.

For More Information

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

Overview of IT Governance and Release 6.0

This section provides a brief introduction to BTO (Business Technology Optimization), the IT governance process, and the Mercury IT Governance Center products.

Business Technology Optimization and the IT Governance Process

Business technology optimization refers to the strategies and processes involved in aligning IT with business goals to maximize IT's business value. Mercury IT Governance Center is used to digitize and automate IT business processes from demand through production to enable customers to optimize and align IT strategy and execution.

Figure 1-1 shows the IT governance process.
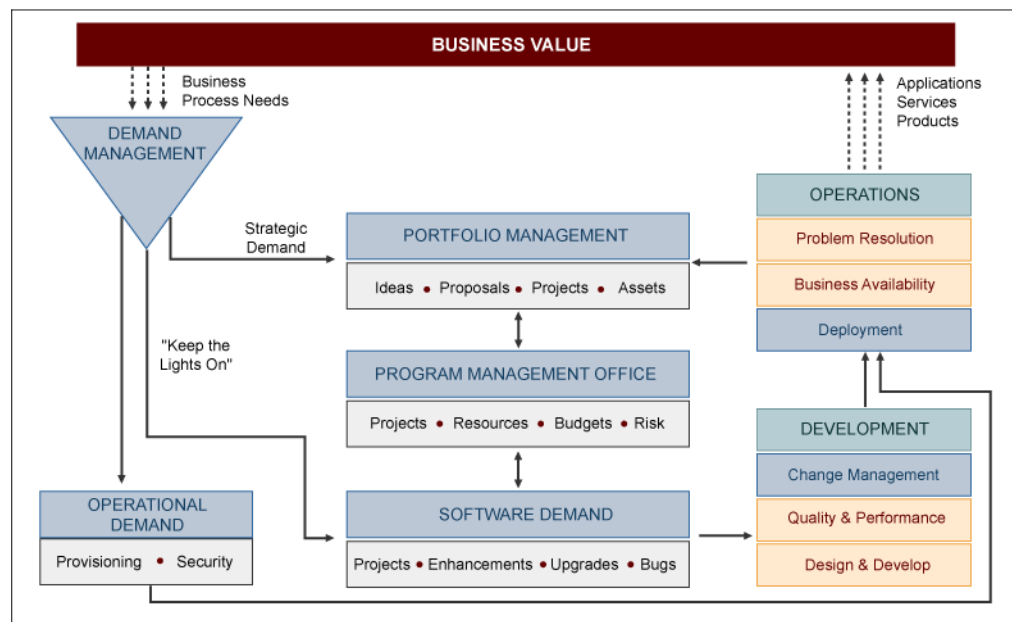
Figure 1-1. IT governance process

Mercury IT Governance Center

As shown in *Figure 1-2*, Mercury IT Governance Center consists a set of products that include:

- Mercury IT Governance Dashboard™

- A number of Mercury IT Governance Center applications (for example, Demand Management and Mercury Portfolio Management™)

- Mercury IT Governance Foundation™
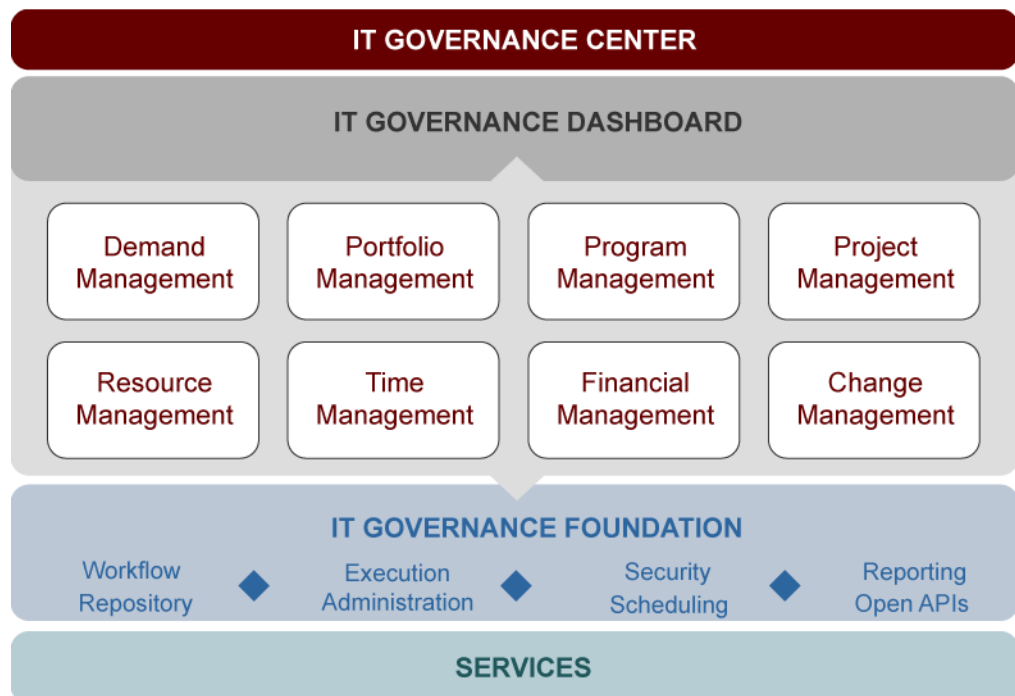
Figure 1-2. Overview of Mercury IT Governance Center

The Mercury IT Governance Center products are listed (by category) in
Table 1-1.

Table 1-1. Mercury IT Governance Center products

Category	Component, Product, or Service
Components	Mercury IT Governance Dashboard
	Mercury IT Governance Foundation
Applications	Mercury Change Management™
	Mercury Demand Management
	Mercury Financial Management™
	Mercury Portfolio Management
	Mercury Program Management™
	Mercury Project Management™
	Mercury Resource Management™
	Mercury Time Management™
Change Management Extensions	Mercury Change Management Extension for Databases™
	Mercury Change Management Extension for E-Commerce Technologies™
	Mercury Change Management Extension for Oracle® E-Business Suite™
	Mercury Change Management Extension for Oracle® Technology™
	Mercury Change Management Extension for PeopleSoft® Enterprise™
	Mercury Change Management Extension for SAP® Solutions™
	Mercury Change Management Extension for Siebel® eBusiness Applications™
Migrators	Mercury GL Migrator
	Mercury Object Migrator™

Table 1-1. Mercury IT Governance Center products [continued]

Category	Component, Product, or Service
Services	Mercury Change Management Service™
	Mercury Portfolio Management Fast Start™
	Mercury Hosted Services for IT Governance Center™
	Mercury Assured Deployment for IT Governance Service™
	Mercury Custom Consulting for IT Governance Service™

Overview of Release 6.0 Features

Features in release 6.0 of Mercury IT Governance Center include:

Major Product Features

- Six-dimensional "what-if" Portfolio Management scenarios

- New and improved resource search

- Document management capabilities

Enhanced Connectivity, Synchronization, and Integration

- Enhancements to the Dashboard

- Increased integration between Project Management and Resource Management

- Conversion of Project Management functions to HTML

Enhanced Features for International Business

- Support for unlimited international calendars

- Multicurrency support

Enhanced Product Usability

- Interface improvements

- Expanded and enhanced product documentation

- Simplified license model

- Reports conversions

- Self-service updates to resource calendars

- Changes to logging

Additional Product Enhancements

- SOP 98-1 monitoring and enforcement

- Enhanced portfolio security

- Time Management enhancements

- Request search enhancements

- Enhancements to the Change Management Extensions

See Also

Calendars, *Currencies*, *Dashboard*, *Licenses*, *Documentation*, *Integration (Between Programs and Project Plans)*, *Interface (Standard)*, *Interface (Workbench)*, *Resources (Resource Management)*, *SOP 98-1 (Statement of Position)*, *Third-Party Applications*, *What-If Analysis*

For More Information

For more information, see:

- *What's New in Release 6.0*

- Other documents referenced in the *What's New in Release 6.0* document

Chapter 1: *Introduction*

For More Information

For more information about business technology optimization, the IT governance process, and the Mercury IT Governance Center products, see the Mercury IT Governance Center section of the the Mercury Web site (www.mercury.com), as shown in *Figure 1-3*.

Figure 1-3. Mercury IT Governance Center section of mercury.com

24   *Key Concepts*

In This Chapter:

This chapter contains an alphabetic listing of the key concepts important in understanding and using Mercury IT Governance Center.

Each topic is defined and described relative to the role it plays in the Mercury IT Governance Center product set. Some topics also include examples, diagrams, screenshots, or all three, to help illustrate usage and best practices.

Topics are cross-referenced with an active link within this document, and also point to other sources of information.

If a given topic applies to one or a limited number of applications (for example, Mercury Change Management or Mercury GL Migrator), that fact is is noted under the **Application(s)** subheading. If a given topic would be of interest only to a specific audience type (for example, end users or database administrators), that fact is noted under the **Audience** subheading. Topics without either subheading are of general interest to users of Mercury IT Governance Center.

Access Grants

Definition

Set a user's screen security.

Usage

A given access grant corresponds to a specific product-oriented screen group in Mercury IT Governance Center products (for example, Demand Management, Project Management, and Change Management, which are highlighted in *Figure 2-1*). Grants give users permission to view, edit, or manage (that is, view and edit) the entities that are part of the screen group.

For example, access to Change Management (the screen group selected in *Figure 2-1*) gives users access to packages, reports, and object types, which appear as screen icons below.

Interface (Workbench)
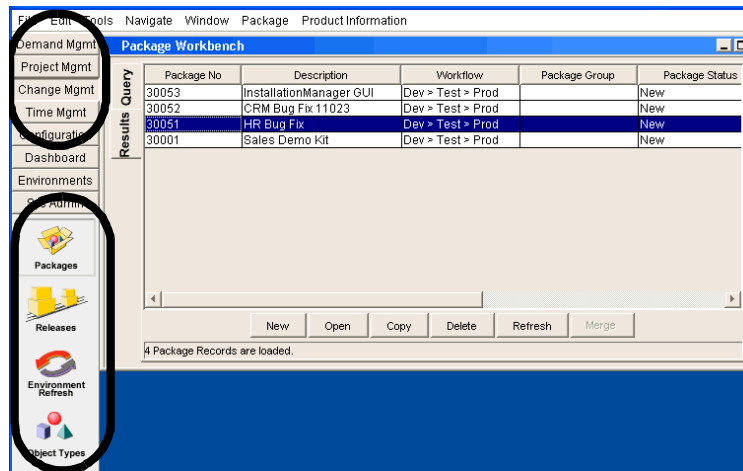
Figure 2-1. Access grants: Screens accessed through the Change Mgmt screen group

Users can get access grant information about themselves in the Mercury IT Governance Center About window (accessible from **Product Information** > **About Mercury IT Governance** on the standard interface menu bar). The About window is shown in *Figure 2-2*.

Interface (Standard)
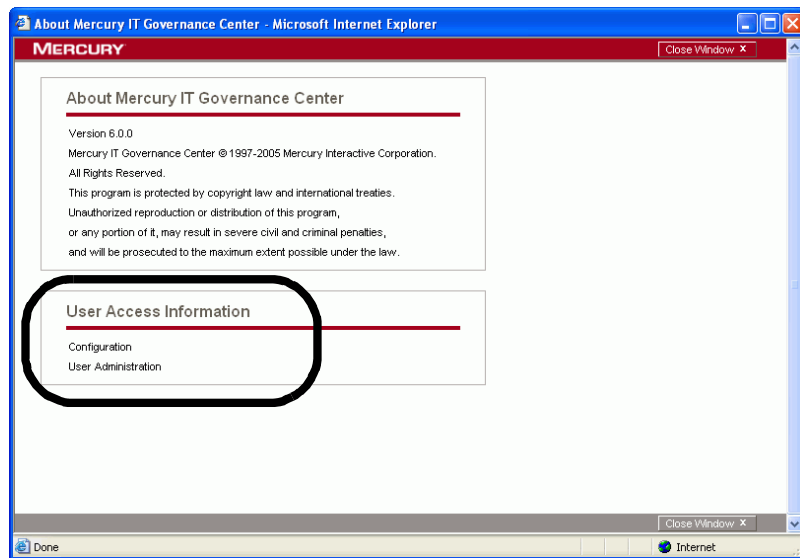
Figure 2-2. Access grants: User access information in the About window

See Also

Security, *Security Groups*

For More Information

Table 2-1. Access grants: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Access grants
Mercury Demand Management User's Guide	Access grants
Security Model Guide and Reference	Creating access grants
What's New in Release 6.0	Upgrade impact: Access grants assigned to security groups

Action Items

Application(s)

Project Management

Definition

Capture information (including priority and status) about a to-do item that does not require the formal definition, tracking, and hierarchical restrictions of a task.

Usage

- Information in an action item can be used to track and verify that details related to the current project are logged, tracked, and eventually resolved.

- An action item can be marked as required, which means that it must be completely resolved before it can be designated as complete.

See Also

Project (Project Management), *Tasks*

For More Information

Table 2-2. Action items: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	Configuring tasks

Activities

Application(s)

Time Management

Definition

Categorize the type of work performed against a work item—for example, design work or documentation. Activities, as well as work items, are tracked by Mercury Time Management.

Usage

Activities can be marked as capitalized.

See Also

SOP 98-1 (Statement of Position), *Time (Time Management)*, *Work Items*

For More Information

Table 2-3. Activities: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Financial Management User's Guide	SOP 98-1
Mercury Time Management Configuration Guide	Maintaining activities

Actuals

Definition

Time actually spent on given tasks.

Usage

SOP 98-1 mandates that IT organizations determine which actual hours were spent on capital activities, which were spent on operating activities, and who did the work.

In release 6.0, Mercury IT Governance Center provides new functionality in support of SOP 98-1.

See Also

Plans Versus Actuals, *SOP 98-1 (Statement of Position)*

For More Information

Table 2-4. Actuals: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Financial Management User's Guide	SOP 98-1 compliance
Mercury Portfolio Management User's Guide	SOP 98-1 portlets
What's New in Release 6.0	SOP 98-1 monitoring and enforcement

Application Codes

Audience

- Application developers or configurators

- System or instance administrators

Definition

Specify information about the applications hosted by your organization's computers.

Usage

- Information in application codes can include usernames, passwords, and base paths to be used for deployment of an application.

- Application codes are defined within environments, and an environment can contain many application codes.

- You can use application codes:

  - To model computers that host more than one application

  - To simplify the number of environments and workflows needed

- Environment token formats are resolved according to the application codes involved.

- A package workflow makes available to users the application codes shared by environments in the workflow.

- You can use application codes in conjunction with environment groups to model server arrays that run multiple applications.

Interface (Workbench)
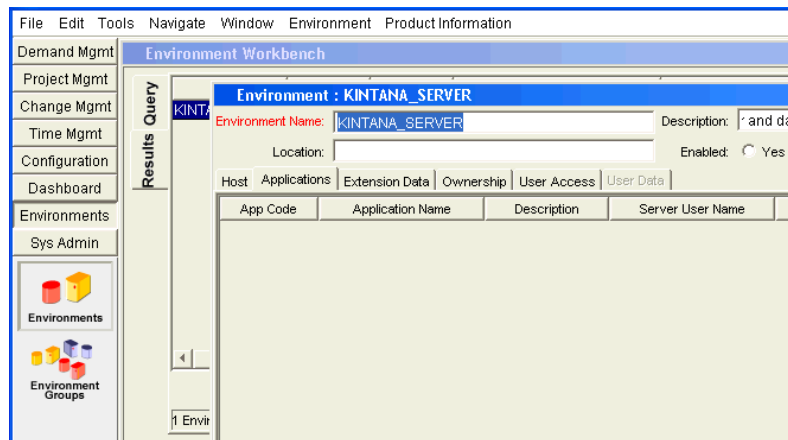
Figure 2-3. Application codes in an environment definition

See Also

Commands, *Environments*, *Tokens*, *Workflows*

For More Information

Table 2-5. Application codes: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Application codes

API (Application Programming Interface)

Audience

- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

The Mercury IT Governance Center application programming interface allows the Mercury IT Governance Center products to work with a number of third-party products—for example, version control products.

See Also

Third-Party Applications

For More Information

Table 2-6. API: Getting more information

Information Source	Sample Related Topics or Tasks
Open Interface Guide and Reference	• Importing an organizational model • Generating requests and packages • Performing workflow transactions for package lines and requests

Architecture

Audience

- System or instance administrators

- Database administrators

Definition

As shown in *Figure 2-4*, Mercury IT Governance Center employs a three-tier architecture consisting of:

- An unlimited number of end-user browsers (client tier)

- One or more middle-tier J2EE application servers (application server tier)

- A single Oracle relational database (database tier)
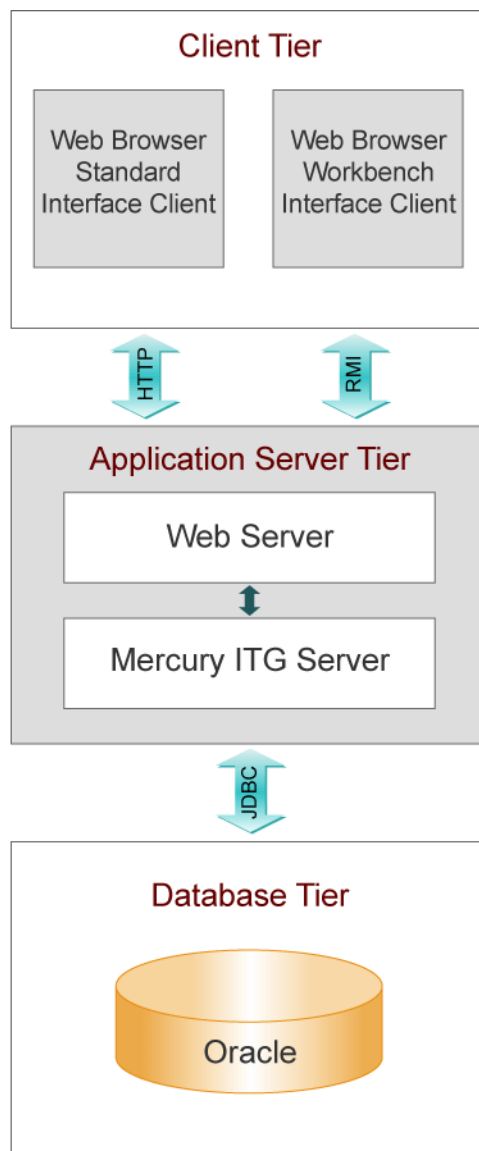
Figure 2-4. Architecture (Mercury IT Governance Center)

Subtopic(s)

Client Tier. The client tier consists of:

- The Mercury IT Governance Center standard interface, which is rendered using JSP (Java Server Pages) and is accessed using a Web browser.

- The Mercury IT Governance Workbench interface, executed using a Java applet installed on the client machine, and launched using the Sun Java plug-in to a Web browser

Communication between the client and application server tiers is accomplished as follows:

- For the standard interface, HTTP or HTTPS, with no code required on end users' machines

  The client accesses information from the database through the J2EE application server using a shared database session pool.

- For the Workbench interface, RMI (Remote Method Invocation) or SRMI (Secure Remote Method Invocation), which has been optimized by Mercury for use in Mercury IT Governance Center

  The architecture and communication protocols have been created to minimize the number of round trips between the applet and server, and the volume of data transferred.

Application Server Tier. The application server:

- Runs on the Microsoft Windows, Sun Solaris, HP-UX, IBM AIX, and Red Hat Linux platforms

- Uses the JBoss Application Server, which has full J2EE 1.3 (Java 2 Platform, Enterprise Edition) support

- Houses workflow, scheduling, notification, and execution engines that drive automated tasks like code deployment to remote systems, dynamic routing, and email notifications

- Can run on one or more machines as a cluster to improve performance and scale hardware as usage increases

- Can optionally integrate with external Web servers like Sun Java System Web Server (formerly Sun ONE Web Server and iPlanet), Microsoft IIS, and Apache

- Maintains a database connection pool that caches connections to the database, which eliminates the need to restart the application server if the database shuts down for scheduled maintenance or system failure

The protocol used for communication between Mercury IT Governance Server and Mercury IT Governance Web server is AJP13—a protocol similar to HTTP that has been optimized for performance.

Communication between the application server and database tiers is achieved using JDBC (Java Database Connectivity).

Database Tier. The database tier consists of an Oracle database containing the tables, procedures, PL/SQL packages, and other components used by the Mercury IT Governance Center products.

All transaction, setup, and auditing data is stored in the database. Mercury IT Governance Center can run on a single database instance, or can leverage Oracle RAC (Real Application Cluster) configuration for load balancing, redundancy, and failover.

Mercury IT Governance Center supports the following Oracle database features:

- A relational data model

- Use of Oracle stored procedures to implement business logic (for example, workflow processing)

- Use of a database pool to eliminate creation of a separate database session for each user or transaction

- Database caching of frequently used data, programs, and procedures to improve performance

See Also

Interface (Standard), *Interface (Workbench)*, *Single Sign-On Software*, *Web Servers*

For More Information

Table 2-7. Architecture: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	System architecture
System Requirements and Compatibility Matrix	Supported products and environments

Archive Strategy

See *Contingency Planning*

Assets

Application(s)

- Financial Management
- Portfolio Management
- Program Management
- Project Management

Definition

Completed projects or the information describing completed projects.

Usage

Assets are periodically reviewed and closed if they no longer have business value. Closed assets are no longer part of a portfolio.

See Also

Asset Classes, *Finance (Financial Management)*, *Portfolio (Portfolio Management)*

For More Information

Table 2-8. Assets: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Configuring assets
Mercury Portfolio Management User's Guide	Creating assets

Asset Classes

Application(s)

Portfolio Management

Definition

Methods of classifying portfolio management entities according to the type of initiative being considered.

Types

- **Infrastructure initiatives**

  These investments provide a shared and standardized base of capability for an organization, and lead to greater business flexibility and integration.

  Examples: Networks, PC upgrades, training, and disaster recovery.

- **Transactional initiatives**

  These IT initiatives process and automate the basic transactions of a company.

  Example: Payroll management.

- **Informational initiatives**

  These projects create systems to provide information for managing an organization.

  Examples: Employee portal and knowledge management system.

Proposals, projects, and assets can simultaneously be classified according to asset class, project class, or both.

See Also

Assets, *Portfolio (Portfolio Management)*, *Project (Project Management)*, *Proposals*

For More Information

Table 2-9. Asset classes: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Asset classes
Mercury Portfolio Management User's Guide	Budgeting by asset class

Assignments

Application(s)

Resource Management

Definition

In Mercury IT Governance Center, automatic links between resources and requests or tasks. Assigning or booking a resource for a task also assigns the resource's primary skill, if one is specified.

See Also

Requests (Request Process), *Resources (Resource Management)*, *Skill*, *Tasks*

For More Information

Table 2-10. Assignments: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management User's Guide	Assigning tasks
Mercury Resource Management User's Guide	Comparing a project's assignments to its staffing profile

Authentication

Audience

- Application administrators

- System administrators

Definition

Information against which users are verified when they log on to the Mercury IT Governance Center system.

For More Information

Table 2-11. Authentication: Getting more information

Information Source	Sample Related Topics or Tasks
Security Model Guide and Reference	Creating a user

Auto-complete Lists

Definition

Fields containing predefined lists of possible values. Provide users with lists of options from which they can select entries for input.

Usage

A list is built in one of three ways:

- A static list of values can be manually entered.

- A dynamic list can be generated based on the results returned by a database query.

- A dynamic list can be generated based on the results returned by a system execution.

The choices are displayed in one of two ways:

- The list can show multiple columns of data for each choice.

- Users can filter the list by entering a string within the value for which they are looking.

Interface (Standard)
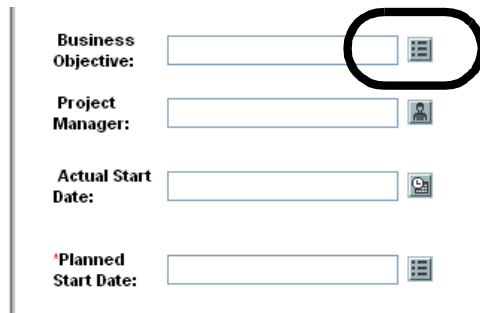
Figure 2-5. Auto-complete lists: List of values icon

See Also

Data Masks, *Drop-down Lists*, *Validations*

For More Information

Table 2-12. Auto-complete lists: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Creating auto-complete validations

Baseline

Application(s)

Project Management

Definition

The original approved plan for a given project.

As a project's scope changes, the baseline is updated to reflect the new plan. Project managers use baseline information to compare current status or progress against the original baseline numbers.

See Also

Project (Project Management), *Tasks*

For More Information

Table 2-13. Baseline: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	● Creating baselines ● Comparing baselines ● Deleting baselines

Best Practices (Mercury IT Governance Center)

Audience

- Application developers or configurators

- System or instance administrators

Definition

An optional module that provides customers with experience-derived information and advice about configuring and using Mercury Portfolio Management, Mercury Program Management, and Mercury Project Management.

Usage

Mercury Best Practices installs various entities (for example, workflows and request types) on your system.

For More Information

Table 2-14. Best Practices: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Installing Best Practices

Bookings

See *Assignments*

Budgets

Application(s)

- Financial Management

- Portfolio Management

- Program Management

- Project Management

Definition

Allocations of money (specified by time period) to be spent between program or project start and finish dates. Budgets at the program or project level are also associated with portfolio management entities, and can be set for both labor and non-labor categories.

Interface (Standard)

Figure 2-6. Budgets: Modify Budgets page

See Also

Assets, *Finance (Financial Management)*, *Portfolio (Portfolio Management)*, *Program (Program Management)*, *Project (Project Management)*

For More Information

Table 2-15. Budgets: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Financial Management User's Guide	Working with budgets
Mercury Portfolio Management User's Guide	Building your portfolio: Creating a budget
Mercury Project Management User's Guide	Creating and using project budgets

Business Objectives

Application(s)

- Portfolio Management
- Program Management
- Project Management

Definition

Sets of business goals that can be prioritized and tied to portfolio, program, or project management entities.

For example, a key business objective for a manufacturing company might be "reduce order to delivery time." The business objective is assigned a priority and associated with a project initiated to upgrade the company's customer service system.

Interface (Standard)

Figure 2-7. Business Objectives: Manage Business Objectives page

See Also

Portfolio (Portfolio Management), *Program (Program Management)*, *Project (Project Management)*

For More Information

Table 2-16. Business objectives: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management User's Guide	Creating business objectives
Mercury Program Management User's Guide	Configuring business objectives

Business Units

Application(s)

Portfolio Management

Definition

Sections or sub-organizations of larger organizations. Portfolio Management entities can be created, displayed, and tracked on an organizational basis, or by business unit.

See Also

Portfolio (Portfolio Management)

For More Information

Table 2-17. Business units: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Configuring business units
Mercury Portfolio Management User's Guide	Specifying a business unit

Calendars

Definition

Specify working and non-working days for entire organizations, departments or individuals within organizations, or locations or branches within organizations.

Interface (Standard)
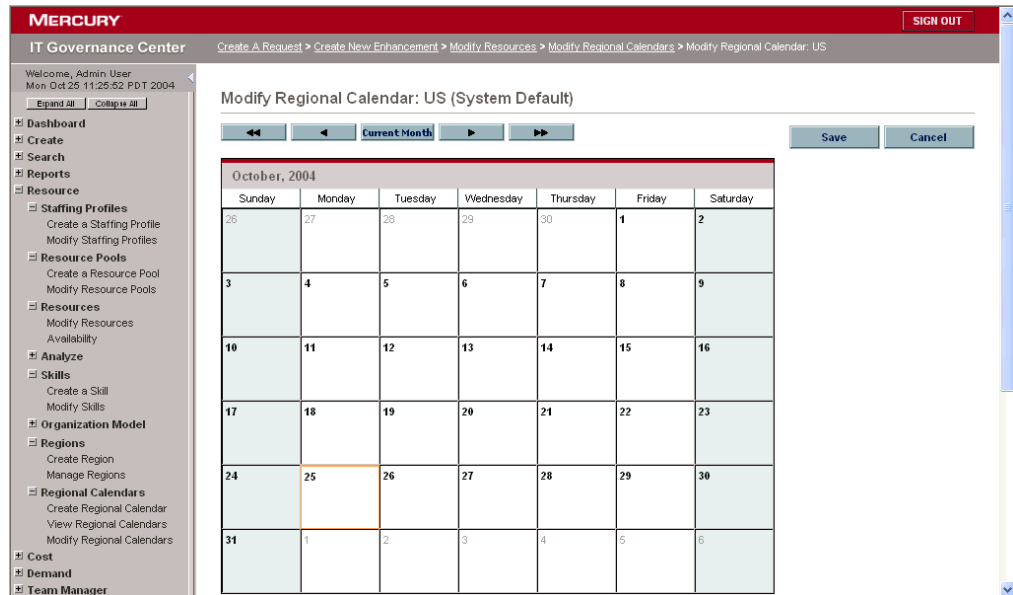
Figure 2-8. Calendars: Modify Regional Calendar page

For More Information

Table 2-18. Calendars: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Tokens related to calendars
Mercury Project Management User's Guide	Associating project plans with calendars
Mercury Resource Management User's Guide	Associating resources with calendars

Table 2-18. Calendars: Getting more information [continued]

Information Source	Sample Related Topics or Tasks
Reports Guide and Reference	Reports related to calendars
Security Model Guide and Reference	Controlling access to calendars
What's New in Release 6.0	• Support for unlimited international calendars • Upgrade impacts of the new calendar support

Change Management (Mercury Change Management)

Application(s)

Change Management

Definition

Mercury Change Management automates the migrations and deployments of software code, configurations, and content—for example, Java programs, Oracle Application configurations, and XML content.

See Also

Extensions (Mercury Change Management), *Mercury IT Governance Center*, *Object Types*, *Packages (Package Process)*, *Workflows*

For More Information

Table 2-19. Change Management: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Change Management application description
Mercury Change Management: Configuring a Deployment System	Configuring Change Management
Mercury Change Management User's Guide	Using Change Management

Charge Codes

Application(s)

Time Management

Definition

Representations of internal or external customers being billed for the cost of work items.

For example, in some organizations actual time is used as information for billings or charge backs. After a given work item is entered, actual time is entered against it. This generates a cost, which is billed to the customer.

Usage

If you specify a customer as a charge code, you can create links between work items and charge accounts, which allows time information to be extracted for billing systems.

See Also

Time (Time Management), *Work Items*

For More Information

Table 2-20. Charge codes: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Configuring charge codes

Clients (Machines)

See *Architecture* and *Web Browsers*.

Cloning

See *Migration (Instance)*

Clustering

See *Server (Mercury IT Governance)*

Commands

Also Called

Special Commands

Audience

- Application administrators
- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

Reusable routines that can be used in object types, request types, report types, validations, and workflow steps to perform automated functions like establishing connections to remote environments and copying files between machines.

Command instructions are interpreted by the execution engine and translated into operating system commands to be dynamically executed. Command sequences allow the automation of an entire sequence of commands that would otherwise need to be run manually one at a time. For example, command sequences could automate source code compilation, check files into version control, or run a report.

Types

- **Mercury-supplied commands,** which begin with `ksc`.

  Examples:

  - `ksc_set`, which sets the value of temporary variables

  - `ksc_store`, which sets the value of request type, object type, and report type custom parameter fields

  - `ksc_simple_respond`, which allows you to remotely execute UNIX commands that require interactive input

- **Custom commands,** which Mercury IT Governance Center automatically prefixes with `sc_`.

  You can define custom commands for purposes like code reuse and encapsulation and modularization of standard routines.

Usage

- Both Mercury-supplied and custom commands can be used in the steps of other commands.

- Use the designated default tokens when referencing parameters in command lines.

● When a parameter is assigned a new value during a command call, every occurrence of its default token is replaced with the new value.

Subtopic(s)

Command Steps. Steps in a command sequence.

Interface (Workbench)
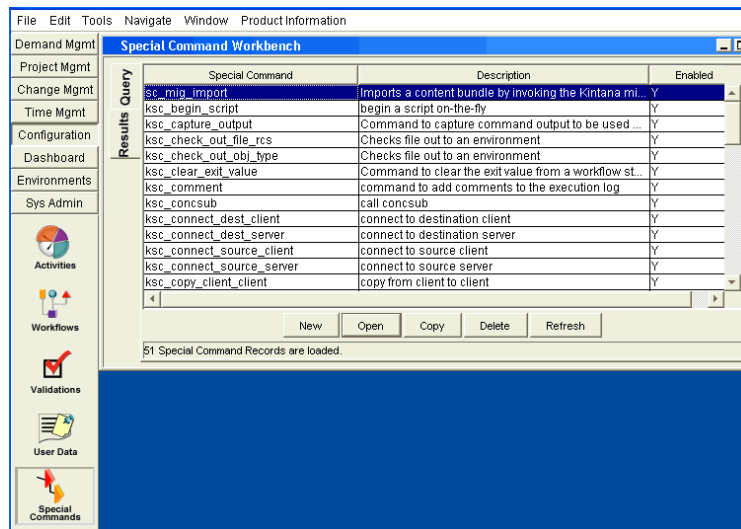
Figure 2-9. Commands: Special Command Workbench

See Also

Command Builder, *Tokens*, *Validations*

For More Information

Table 2-21. Commands: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	• Creating commands • Editing commands • List and descriptions of `ksc` commands
Mercury Change Management: Configuring a Deployment System	Designing commands
Mercury Demand Management: Configuring a Request Resolution System	Request type commands

Command Builder

Also Called

Special Command Builder

Audience

Application developers or configurators

Definition

A tool used to find and build correct command syntax.

Interface (Workbench)
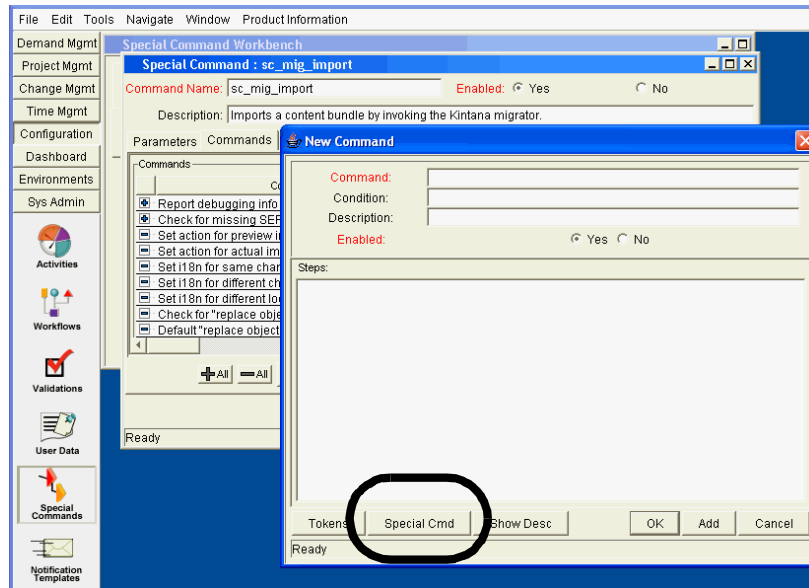
Figure 2-10. Command Builder: Accessing

See Also

Commands, *Object Types*, *Tokens*

For More Information

Table 2-22. Command Builder: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Using Command Builder

Configuration (Application Configuration)

Audience

- Application administrators

- Application developers or configurators

Definition

Changes to a Mercury IT Governance Center application or the Mercury IT Governance Center standard interface using Mercury-supplied entities and mechanisms.

Versus *customization*, which refers to customer-initiated changes made outside the Mercury-supplied configuration "framework."

Usage

Application configurations to Mercury IT Governance Center are generally automatically re-implemented during the Mercury IT Governance Center upgrade process. In contrast, you need to re-implement customizations manually when you upgrade to a new version of Mercury IT Governance Center.

See Also

Configuration (Server or System Configuration), *Customization*

For More Information

Table 2-23. Configuration (Application): Getting more information

Information Source	Sample Related Topics or Tasks
Any of the documents in the Configuration category (as described in the *Guide to Documentation*)	- Configuring the standard interface - Configuring a deployment system - Configuring a request resolution system - Configuring IT demand tracking and management

Configuration (Server or System Configuration)

Audience

- System or instance administrators

- Database administrators

Definition

Process required to set up an installation instance for use.

See Also

Configuration (Application Configuration), *Server (Mercury IT Governance)*

For More Information

Table 2-24. Configuration (Server): Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Configuring the Mercury IT Governance Server

Configuration Security

See *Security*

Contacts

Application(s)

Mercury Demand Management

Definition

Resources used as a point of reference or information.

Usage

Contacts can be users internal to Mercury IT Governance Center applications, as well as external users.

You create contacts in the Contact Workbench.

Interface (Workbench)
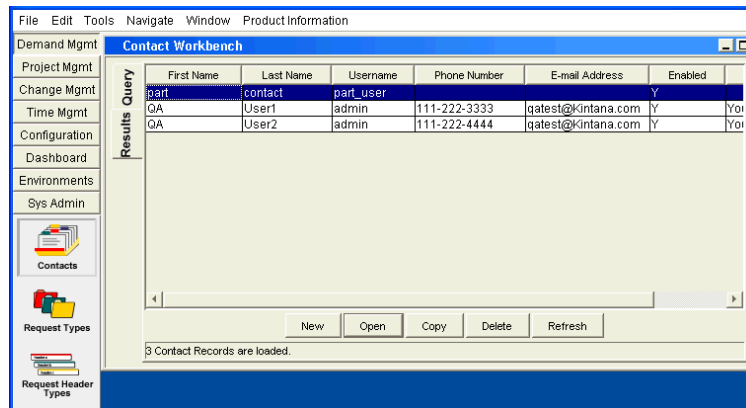
Figure 2-11. Contact Workbench

See Also

Demand (Demand Management)

For More Information

Table 2-25. Contacts: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Demand Management: Configuring a Request Resolution System	Configuring contacts

Contingency Planning

Audience

- System or instance administrators
- Database administrators

Definition

Emergency planning.

Usage

The following are often included in a contingency plan:

- **Backup plans** for Mercury IT Governance Center and the Oracle database schema
- **Failover plans** involving a second server, maintained by a disk-mirroring application, on standby.
- **Database redundancy mechanisms** handled by leveraging standard Oracle database replication services, backups, and re-do logs.
- **Failover mechanisms** for deployments through Mercury IT Governance Center handled by defining workflow steps with loopover transitions.

For More Information

Table 2-26. Contingency planning: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	- Backing up the file system - Backing up the Oracle database

Critical Path

Application(s)

Project Management

Definition

The longest path through a project.

The critical path consists of a series of key tasks that collectively determine a project's duration.

See Also

Project (Project Management), *Tasks*

For More Information

Table 2-27. Critical path: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	Calculating the critical path

Currencies

Application(s)

- Financial Management
- Portfolio Management
- Program Management
- Project Management

Definition

Money in circulation (for example, US dollars or euros).

Base Currency

The currency chosen as the primary currency for a Mercury IT Governance Center instance.

Local Currencies

One or more currencies chosen in addition to the base currency for a Mercury IT Governance Center instance.

For More Information

Table 2-28. Currencies: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Financial Management User's Guide	Managing currencies and financial exchange rates
Mercury Resource Management User's Guide	Specifying currency display
System Administration Guide and Reference	• Setting the base currency during installation • Setting the base currency during upgrade
What's New in Release 6.0	• Multicurrency support • Upgrade impacts of the new multicurrency support

Customization

Audience

- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

Customer-initiated changes to the Mercury IT Governance Center standard interface to conform to business processes and standards.

For example, you might want to replace the Mercury logo with your own, or change the interface color scheme.

Versus *configuration*, which refers to changes to a Mercury IT Governance Center application or the Mercury IT Governance Center standard interface using Mercury-supplied entities and mechanisms.

Usage

You can customize the standard interface using one of the following methods:

- Creating a new directory for the custom JSP files

- Directly changing the original files in the `knta` directory

- Creating new JSP and related files in the `knta` directory

In general, you need to re-implement customizations when you upgrade to a new version of Mercury IT Governance Center. Application configurations to Mercury IT Governance Center, by contrast, are generally automatically re-implemented during the Mercury IT Governance Center upgrade process.

See Also

Configuration (Application Configuration), *Interface (Standard)*, *Java*, *JSP (Java Server Pages)*

For More Information

Table 2-29. Customization: Getting more information

Information Source	Sample Related Topics or Tasks
Configuring the Standard Interface	Configuring and customizing the standard interface
System Administration Guide and Reference	Configuring and customizing the server and system environment

Dashboard

See *Interface (Standard)*

Dashboard Modules

See *Modules*

Dashboard Pages

See *Interface (Standard)*

Data Masks

Audience

- Application developers or configurators
- Database administrators

Definition

Values used to screen out unwanted data types in Mercury IT Governance Center validations.

Usage

Text fields can be configured to use the following data masks: Alphanumeric or alphanumeric uppercase, numeric, currency, percentage, telephone, and custom.

See Also

Auto-complete Lists, *Drop-down Lists*, *Validations*

For More Information

Table 2-30. Data masks: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Configuring text fields
Mercury Change Management: Configuring a Deployment System	Configuring project and task user data roll-ups
Mercury Demand Management: Configuring a Request Resolution System	Configuring project and task user data roll-ups

Database

See *Architecture*

Database Links

Application(s)

- Mercury GL Migrator

- Mercury Object Migrator

Audience

- System or instance administrators

- Database administrators

Definition

When integrated with Mercury Object Migrator or Mercury GL Migrator, Mercury IT Governance Server uses a set of database links for each Oracle E-Business Suite instance. These links allow the migration of AOL (Application Object Library) objects.

Database links are defined to provide a connection from the Mercury Object Migrator schema to the APPS schema of a given instance.

For More Information

Table 2-31. Database links: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury GL Migrator Guide	Setting up database links
Mercury Object Migrator Guide	Setting up database links
System Administration Guide and Reference	System architecture

Delegation

Application(s)

- Resource Management
- Time Management

Definition

A situation in which one resource is assigned a responsibility or work item belonging to another resource. Delegations have specific start dates and end dates.

For example, a manager who normally approves the time sheets for her team goes on vacation and delegates time sheet approval to a subordinate on the team.

Usage

To perform operations as a delegatee, resources must have the proper access grants (which are not inherited when the delegation is made). Charge code access is also not transferred from a delegator to a delegatee.

See Also

Calendars, *Charge Codes*, *Resources (Resource Management)*, *Time (Time Management)*, *Time Sheets*

For More Information

Table 2-32. Delegation: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Authority to delegate
Mercury Time Management User's Guide	Setting delegating for resources

Demand (Demand Management)

Application(s)

Demand Management

Definition

Mercury Demand Management provides a single application and repository to capture demands made against IT organizations. Information is consolidated from multiple sources so users can view aggregate demand in real time and report against it.

See Also

Contacts, *Mercury IT Governance Center*, *Requests (Request Process)*, *Workflows*

For More Information

Table 2-33. Demand Management: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Demand Management application description
Configuring IT Demand Tracking and Management	• Configuring demand sets • Configuring workflows for IT demand • Configuring SLAs for IT demand
Mercury Demand Management: Configuring a Request Resolution System	• Configuring workflows and request types • Configuring user data • Worksheets
Mercury Demand Management User's Guide	• Configuring requests • Integrating requests and projects • Demand management portlets

Deployment

Application(s)

Change Management

Definition

The distribution of a release.

Usage

In deploying a software release, a release manager would typically decide which workflow controls the release process and which packages are included.

See Also

Change Management (Mercury Change Management), *Releases*, *Release Managers*

For More Information

Table 2-34. Deployment: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	• Gathering process requirements • Configuring workflows, object types, environments, and user data • Rolling out your deployment process

Directories

Audience

- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

An organizational unit, or container, used to organize folders and files into a hierarchical structure.

See Also

Files, *LDAP (Lightweight Directory Access Protocol)*

For More Information

Table 2-35. Directories: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Server directory structure

Document Management

Definition

The optional document management module in Mercury IT Governance Center gives users greater control over storing and searching documents than is possible in the standard Mercury IT Governance Center applications. The Mercury document management technology, created by EMC/Documentum (as Documentum Content Management) and available direct from Mercury, allows customer organizations to track, index, and search multiple versions of the supporting documents that are attached to many Mercury IT Governance Center entities—for example, entities included in:

● Mercury Demand Management

● Mercury Portfolio Management

● Mercury Program Management

● Mercury Project Management

Documents managed in these environments are always directly related to a Mercury IT Governance Center entity—for example, a request (including portfolios, proposals, projects, and assets), project plan, or program—through the standard attachment field and document references functionality in Mercury IT Governance Center.

See Also

References, *Requests (Request Process)*

For More Information

Table 2-36. Document management: Getting more information

Information Source	Sample Related Topics or Tasks
Document Management Guide and Reference	● Installing document management ● Using document management
What's New in Release 6.0	● New document management functionality ● Upgrade impacts of the new document management functionality

Documentation

Definition

The information describing how to install, upgrade, maintain, configure, and use the applications and other products that are part of Mercury IT Governance Center.

Subtopic(s)

Documentation Home Page. This page (shown in *Figure 2-12*) provides HTML documentation, PDF documentation, or both for the Mercury IT Governance Center products.
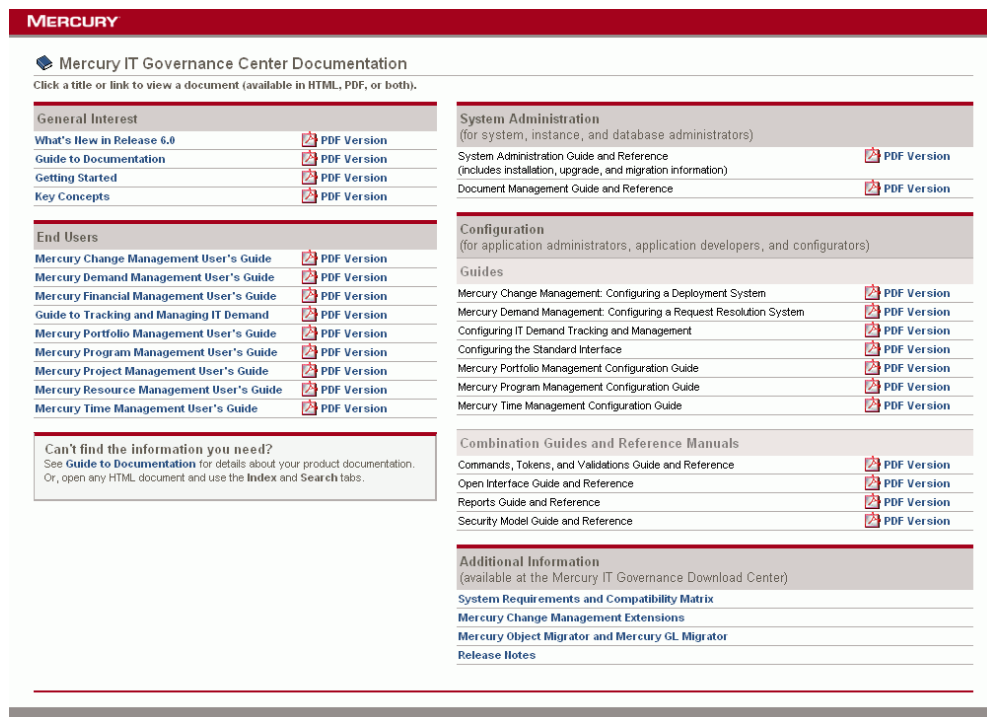
Figure 2-12. Documentation home page

Access

The documentation is accessible in multiple ways:

- **Standard interface.** Click **Product Information > Documentation** in the menu bar, as shown in *Figure 2-13*.
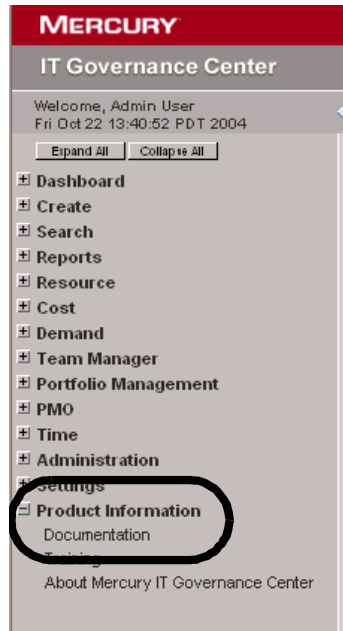
Figure 2-13. Documentation home page: Accessing in the standard interface

● **Workbench interface.** Click **Product Information > Documentation** in the menu, as shown in *Figure 2-14*.
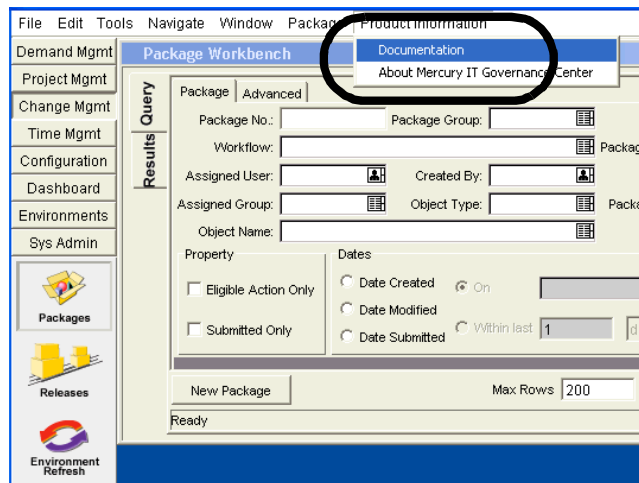
Figure 2-14. Documentation home page: Accessing in the Workbench interface

● **Mercury IT Governance Download Center.** This site contains PDF documentation for the Mercury IT Governance Center applications, and Mercury Change Management Extensions and Migrators:

http://itg.mercury.com/support/download/login.jsp

For more information about the download center, see *Download Center (Mercury IT Governance)*.

● **<ITG_Home>/docs directory.** This directory is created and populated during Mercury IT Governance Center installation or upgrade.

See Also

Help (Portlet)

For More Information

Table 2-37. Documentation: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	• Audience descriptions • Product descriptions • Document descriptions • Accessing the product documentation
What's New in Release 6.0	Expanded and enhanced product documentation

Download Center (Mercury IT Governance)

Audience

System or instance administrators

Definition

Web address from which Mercury IT Governance Center products can be downloaded.

Access

You can access the Mercury IT Governance Download Center at:

http://itg.mercury.com/support/download/login.jsp

The logon screen is shown in .
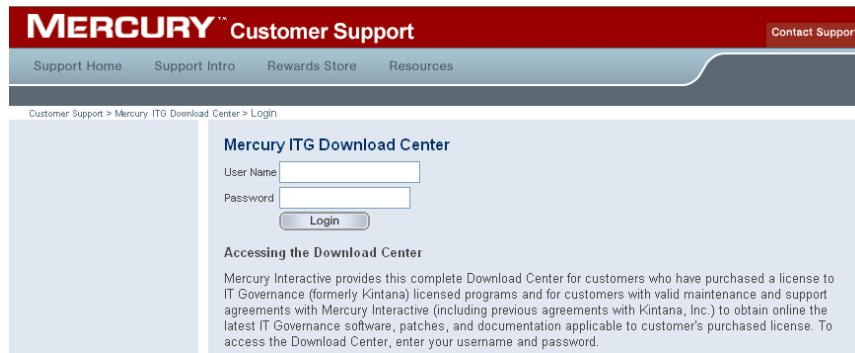
Figure 2-15. Download Center: Logon screen

Usage

When customers purchase a Mercury IT Governance Center product, they are given a unique username and password that allows them to access the software they purchased, along with related product documentation.

All components needed for a given product are delivered as a single bundle file.

See Also

Mercury IT Governance Center

For More Information

Table 2-38. Download Center: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center
Documentation for Mercury Change Management Extensions, Mercury GL Migrator, and Mercury Object Migrator	• Installing or upgrading the Extensions • Installing or upgrading the the Migrators

Drop-down Lists

Definition

Predefined lists of items for entering data into a field. Provides users with lists of options from which they can select the entries for input fields.

Usage

The lists can be built in one of two ways:

● Manually, by entering a static list of values

● Dynamically, by generating a list based on the results returned by a database query

Interface (Standard)
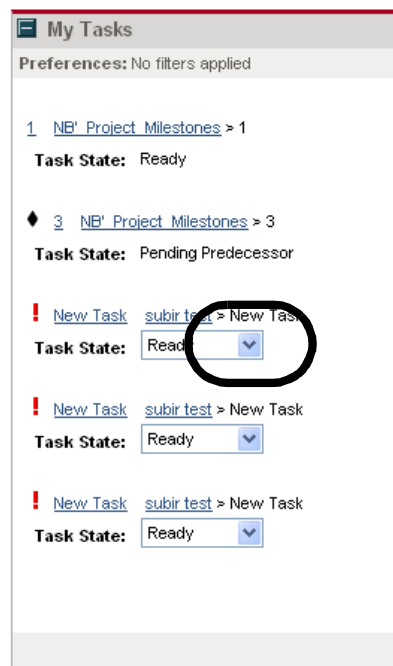
Figure 2-16. Drop-down lists: Selecting a drop-down list of values

See Also

Auto-complete Lists, *Data Masks*, *Validations*

For More Information

Table 2-39. Drop-down lists: Getting more information

Information Source	Sample Related Topics or Tasks
Getting Started	● Using the standard interface ● Using the Workbench

Email Server

Audience

● Application developers or configurators

● System or instance administrators

Definition

Mercury IT Governance Center uses an email server to send notifications. Mercury IT Governance Center can integrate with any SMTP-compliant mail server—for example, Microsoft Exchange and UNIX sendmail.

Usage

To send automated emails, Mercury IT Governance Center needs to have the IP address of the email server and a logon name of a valid user on the email server.

See Also

Architecture, *Server (Mercury IT Governance)*, *Notifications*, *System Requirements*

For More Information

Table 2-40. Email server: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	System architecture
System Requirements and Compatibility Matrix	Email server requirements

Encryption

Audience

System or instance administrators

Definition

The translation of data into a secret code for data security.

Usage

Mercury IT Governance Center uses a client/server encryption model utilizing the ElGamal algorithm that generates a public/private key pair. All client/ server encryption is done using the Mercury IT Governance Server public key, and only the server can decrypt the data using the private key. This means that the client application does not have access to encrypted data.

See Also

Architecture, *Server (Mercury IT Governance)*

For More Information

Table 2-41. Encryption: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	System overview

Entities

Audience

- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

Objects that must be configured before business users can process requests, packages, package lines, project plans, or tasks.

Many entities (for example, request types or workflows) are provided by Mercury as part of application packages, and are installed during application installation or upgrade.

See Also

Entity Relationships, *Packages (Package Process)*, *Project (Project Management)*, *Tasks*

For More Information

Table 2-42. Entities: Getting more information

Information Source	Sample Related Topics or Tasks
Open Interface Guide and Reference	● Generating requests and packages ● Performing workflow transactions for package lines and requests
System Administration Guide and Reference	Migrating entities
Commands, Tokens, and Validations Guide and Reference	Information about commands, tokens, and validations
All documents in the End User category (as described in the *Guide to Documentation*)	Information about entities like requests and packages
All documents in the Configuration category (as described in the *Guide to Documentation*)	Information about entities like workflows and request types

Entity Relationships

Audience

● Application developers or configurators

● System or instance administrators

● Database administrators

Definition

An entity is a piece of data—an object or concept about which data is stored.

A relationship is how the data is shared between the entities.

Usage

Figure 2-17 shows the relationships among the key entities in Mercury IT Governance Center.
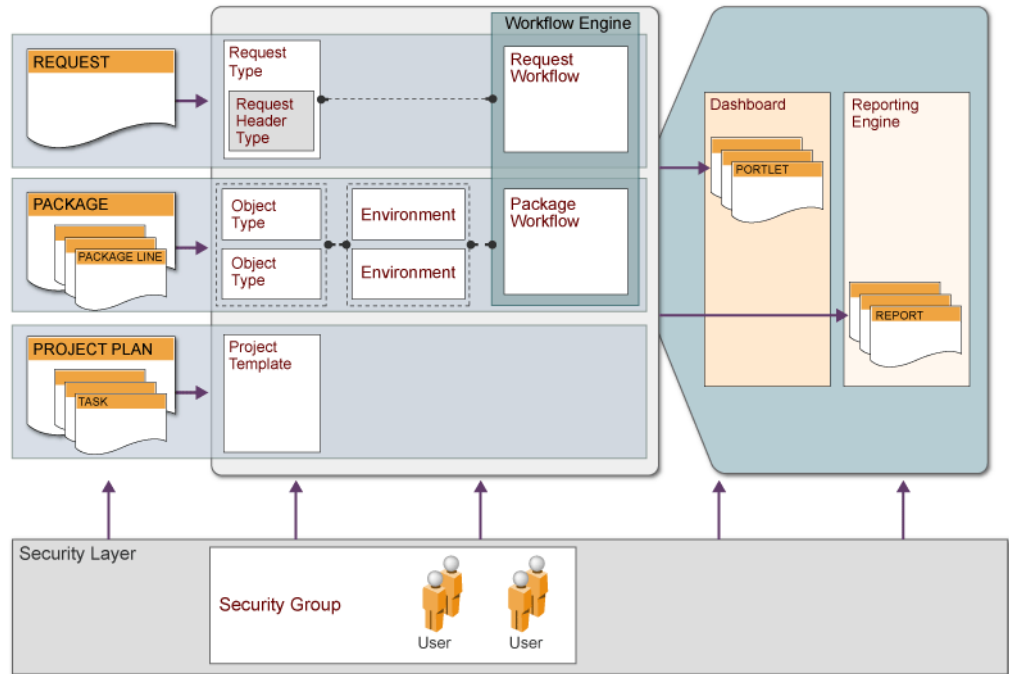
Figure 2-17. Entity relationships among key entities

See Also

Entities, *Security*

For More Information

Table 2-43. Entity relationships: Getting more information

Information Source	Sample Related Topics or Tasks
Security Guide and Reference	• Licenses • Configuration security • Access grants

Entity Security

See *Security*

Environments

Audience

- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

Definitions of the system entities (for example, server or client machine, database instance) with which Mercury IT Governance Center products need to communicate. These entities can be computers involved in code deployment—for example, development, test, and production machines. They can also be computers hosting third-party applications—for example, version control or reporting applications.

Usage

Environments are defined in the Environments screen group in the Workbench interface. The definitions can be accessed through workflows and object types.

Additional information:

- Environments store information identifying the computers and how to connect to them.

- Each environment can have up to three parts to model the three-tier architecture common to many applications: Server, client, and database. An environment definition consists of one section for each tier: Server, Client, Database.

- Environments are used in package workflows to specify an actual migration path.

- Environments can be referenced in commands throughout Mercury IT Governance Center products.

- Not all sections need to be defined for every environment, but sections that are defined must be enabled.

Examples

A production environment consists of three machines, which must each be separately defined in a production environment definition:

● Prod 1 (the application server), which contains folders labeled `java` and `c++`

● Prod 2 (the Web server), which contains folders labeled `html`, `gif`, and `bin`

● Prod 3 (the database server), which consists of an Oracle database containing tables, views, and procedures

Interface (Workbench)
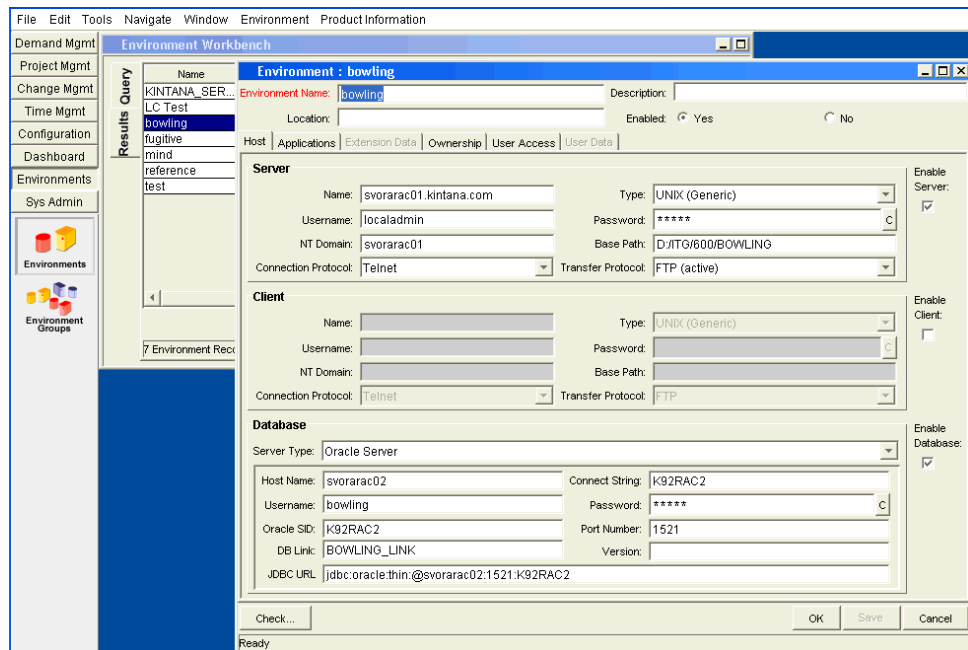
Figure 2-18. Environment Workbench

See Also

Application Codes, *Environment Group*, *Packages (Package Process)*, *Passwords*, *Security*

For More Information

Table 2-44. Environments: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring environments
Mercury Change Management User's Guide	Configuring environments
Mercury GL Migrator Guide	Configuring environments
Mercury Object Migrator Guide	Configuring environments
System Administration Guide and Reference	System architecture
Documentation for the Mercury Change Management Extensions	Configuring environments

Environment Group

Audience

- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

Environment groups consolidate environment definitions, so changes can be deployed to all computers in a group at the same time.

Usage

You use environment groups to:

- Model applications that have distributed server architecture

- Deploy to multiple servers without creating parallel workflow steps

- More easily manage dynamic environments

Additional information:

- Environment groups are more likely to be used with target environments than with source environments.

- Transitions for environment group steps include Succeeded, Failed - Abort, Failed - Reset, and Failed - Reset Failures.

- When a package line is processed through a migrate step that uses an environment group, the migration is performed through each environment linked to the group.

- An execution log is generated for the migration to each environment.

- You can use application codes in conjunction with environment groups to model server arrays that run multiple applications:

  - The application codes are defined in each environment, and an environment group links all the environments together.

  - You can use mixed application codes in conjunction with environments groups even if some applications run only on a subset of the machines in the server array.

  - When deploying a package line for an application, Mercury Change Management migrates the package line only to environments that have the corresponding application code defined.

Interface (Workbench)
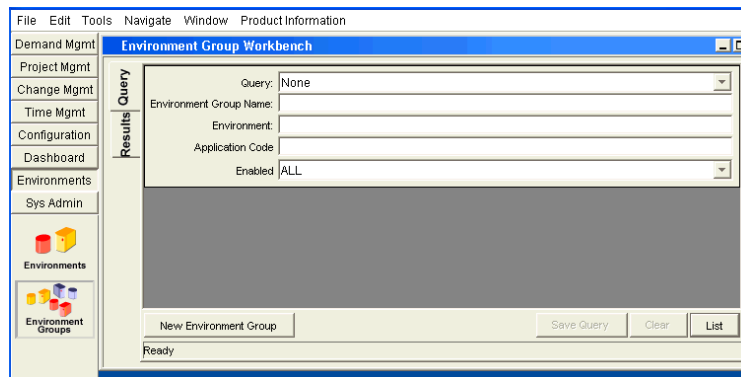
Figure 2-19. Environment Group Workbench

Process Overview

To configure an environment group:

1. Create an environment group definition.

2. Add environments to the environment group.

3. Specify the source environments for when changes are deployed from the group.

4. Define the order of deployment for when changes are deployed to the group.

5. Use the environment group in a workflow step.

See Also

Application Codes, *Environments*

For More Information

Table 2-45. Environment groups: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring environment groups
System Administration Guide and Reference	System architecture

Excel Spreadsheets (Microsoft)

Audience

- End users
- Application administrators

Definition

A Microsoft software product.

Usage

Targets for portlet data exported from the Mercury IT Governance Center Dashboard. Portlet data can be exported to Microsoft Excel spreadsheets by clicking the **Export to Excel** button in a portlet.

Access

Figure 2-20 shows the **Export to Excel** button.
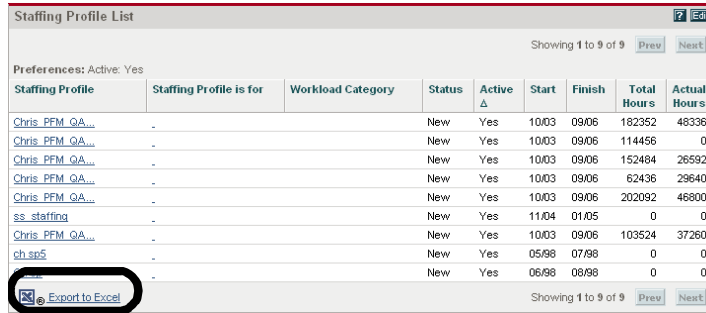
Figure 2-20. Export to Excel button

For More Information

Table 2-46. Excel spreadsheets: Getting more information

Information Source	Sample Related Topics or Tasks
Getting Started	Exporting data to Excel spreadsheets
System Requirements and Compatibility Matrix	Supported versions of Microsoft Excel

Exception Rules

Application(s)

Project Management

Definition

Criteria for evaluating variables and risks associated with project lifecycles.

Usage

In Mercury IT Governance Center, exceptions are triggered at the task level. The project management summary condition indicator summarizes the task exceptions for every project and subproject. When a task triggers an exception, an email notification can be sent to the appropriate user.

Exception rules for master projects include unassigned tasks, late tasks, tasks starting late, late estimated finish, not enough time left, predecessor has exception, and critical path running late.

See Also

Project (Project Management), *Tasks*

For More Information

Table 2-47. Exception rules: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	Creating exception rules

Execution Engine

See *Architecture*

Execution Logs

See *Logs*

Extensions (Mercury Change Management)

Application(s)

Change Management

Definition

Mercury Change Management Extensions help to automate change management in various environments—for example:

- Database environments like DB2, Sybase, and SQL Server

- E-Commerce environments like Java, C++, HTML, and XML

- Oracle E-Business Suite environment

- Oracle Technology environment

- PeopleSoft environments

- SAP® environments

- Siebel environments

See Also

Mercury IT Governance Center

For More Information

Table 2-48. Extensions: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Descriptions of the Extensions
Documentation for the Mercury Change Management Extensions	Information about installing, upgrading, configuring, maintaining, and using the Extensions

Failover

Audience

System or instance administrators

Definition

An operation that automatically switches server operations to a standby server if the primary server fails or is temporarily shut down for service.

Usage

The failover functionality in Mercury IT Governance Center helps to ensure that:

● Logon functions can be serviced by any running active server.

● Mercury IT Governance Center services like notifications and scheduled executions can run on any active server and will be picked up by another server if the currently active server fails or is shut down.

For More Information

Table 2-49. Failover: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	● Configuring a server cluster ● Maintaining the system ● Backing up instances

Fields

Audience

● Application administrators

● Application developers or configurators

Definition

A space allotted for a particular item of information.

Subtopic(s)

Field Groups. Sets of fields delivered with Mercury IT Governance Center products to allow certain functions to be enabled together.

For example, Mercury Demand Management has a Demand Management Scheduling Fields field group to allow consistent tracking of information across multiple request types.

Field Logic. Business logic applied to a request field as the request proceeds through a workflow.

For example, if the Request Priority field is set to critical, then the Assigned To field can be automatically set to the resource responsible for dealing with critical issues.

Field behavior can be configured in the following ways:

- A field value can be updated.

- A field can be automatically populated with a specific value.

- A field can become invisible or non-editable.

- A field can be set to Required or Needs To Be Reconfirmed.

Field behavior can be triggered by the following kinds of events:

- Another field in the request changes

- The request status changes (based on its workflow)

- Request type commands are executed

Field Notification. Alerts individuals when entries for specific input fields are updated.

Additional information:

- A single field can be configured to send multiple notifications.

- Notifications can be scheduled.

- The message contained in a notification can include both static and dynamic text.

- Tokens can be used to reference information specific to the request being processed.

See Also

Notifications, *Security*, *Tokens*, *Validations*

For More Information

Table 2-50. Fields: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	● Creating validations ● Configuring validations
Mercury Change Management: Configuring a Deployment System	Fields related to packages
Mercury Change Management User's Guide	Fields related to packages
Mercury Demand Management: Configuring a Request Resolution System	Creating request fields
Mercury Demand Management User's Guide	Fields related to requests
Mercury Project Management User's Guide	Creating custom project plan fields

Field Security

See *Security*

Files

Definition

Collections of data or information that have names.

See Also

Directories

For More Information

Table 2-51. Files: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management User's Guide	File chooser
System Administration Guide and Reference	Backing up files

File System

Audience

System or instance administrators

Definition

The system that an operating system or program uses to organize and keep track of files.

Usage

Mercury IT Governance Center stores most of the application data in the Oracle database. However, in the file system are stored:

- File attachments to tasks, requests, and packages

- Report output

- Execution logs for package or request executions

- Server configuration parameters

- License configuration file

In a simple configuration where all Mercury IT Governance Servers are running on the same machine, the `ITG_Home` directory is shared.

In a more complex configuration where Mercury IT Governance Servers are running on multiple machines, the *ITG_Home* directory is mounted on the servers using NFS (Network File System) or other standard Windows file-sharing mechanisms so that all Mercury IT Governance Servers have access to the file system.

See Also

Architecture

For More Information

Table 2-52. File system: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center • Backing up the file system

Filter Criteria

Audience

Application developers or configurators

Definition

A filter is a pattern through which data is passed. Only data that matches the pattern is allowed to pass through the filter.

The filter criteria specify the data that is allowed to pass through.

See Also

Portlets, *Reports*

For More Information

Table 2-53. Filter criteria: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Filter fields in the auto-complete window

Finance (Financial Management)

Application(s)

- Financial Management
- Portfolio Management

Definition

Mercury Financial Management supports the complete financial management lifecycle. It covers both operating budgets (including internal staff, outside services, and overhead) and capital budgets (including hardware, software, and facilities). Project managers can use the functionality in Mercury Financial Management to track the planned and actual financial costs associated with given projects; for example, planned and actual cost, planned value, earned value, cost performance index, and schedule performance index.

Usage

Mercury Financial Management helps you make decisions related to the following analyses:

- What-if
- Cost/benefit
- ROI (return on investment)

Subtopic(s)

Financial exchange rates. In Mercury Financial Management, the rates used to calculate the exchange rates between a local currency and the system's base currency.

See Also

Assets, *Budgets*, *Portfolio (Portfolio Management)*, *Project (Project Management)*, *What-If Analysis*

For More Information

Table 2-54. Financial Management: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Financial Management application description
Mercury Financial Management User's Guide	• Working with budgets • Managing financial exchange rates and currencies • Tracking and analyzing financial data • SOP 98-1 compliance
Mercury Portfolio Management User's Guide	What-if analysis
What's New in Release 6.0	• Release 6.0 features related to Financial Management • Release 6.0 upgrade impacts related to Financial Management

Gantt Charts

Definition

Graphs of the tasks associated with projects, plotted against time axes that can be expanded or decreased to provide different levels of details.

See Also

Project (Project Management)

For More Information

Table 2-55. Gantt charts: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	• Using Gantt charts • Printing Gantt charts

GL Migrator

See *Migrator (Mercury GL)*

Globalization

See *Localization*

Help (Online)

See *Documentation*

Help (Portlet)

See *Portlet Help*

HTML Interface

See *Interface (Standard)*

Installation

Audience

- System or instance administrators

- Database administrators

Definition

The process of installing and configuring one or more of the Mercury IT Governance Center products for use. Sometimes refers to a first-time installation (as opposed to an application upgrade).

See Also

Architecture, *Upgrade*

For More Information

Table 2-56. Installation: Getting more information

Information Source	Sample Related Topics or Tasks
Document Management Guide and Reference	Installing the document management module
Mercury GL Migrator Guide	Installing Mercury GL Migrator
Mercury Object Migrator Guide	Installing Mercury Object Migrator

Table 2-56. Installation: Getting more information [continued]

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installation/upgrade overview • Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center • Configuring Mercury IT Governance Center
What's New in Release 6.0	New location for installation information
Documentation for the Mercury Change Management Extensions	Installing the Extensions

Instances

Audience

- System or instance administrators

- Database administrators

Definition

Single installations of Mercury IT Governance Center.

See Also

Architecture, *Server (Mercury IT Governance)*

For More Information

Table 2-57. Instances: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Migrating instances

Integration (Between Programs and Project Plans)

Application(s)

Program Management, Project Management

Definition

Ability to work together.

See Also

Integration (Between Projects and Project Plans), *Program (Program Management)*, *Project (Project Management)*

For More Information

Table 2-58. Integration between programs and project plans: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management User's Guide	Building your portfolio
What's New in Release 6.0	Increased integration between program and project management

Integration (Between Projects and Project Plans)

Application(s)

Project Management

Definition

In Mercury Project Management, project plans can be linked to projects.

Example(s)

If a budget is linked to either a project plan or a project, it becomes linked to both, and rollup can occur from the project plan to the budget.

See Also

Integration (Between Programs and Project Plans), *Project (Project Management)*

For More Information

Table 2-59. Integration between projects and project plans: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management User's Guide	Building your portfolio

Integration (Between Requests and Packages)

Application(s)

- Change Management

- Demand Management

Definition

Mercury Change Management and Mercury Demand Management are tightly integrated.

Usage

Combining the functionalities of request and package processes provides the following benefits:

- Streamlines processes to create a closed-loop system for request resolutions that require software changes

- Helps to ensure that information about software change requests is efficiently collected from end users and approvers, and then efficiently relayed to the developers who are building and migrating the deployment packages

- Maintains an audit trail from the initial request submission to the final software deployment into the production environment

Types

- **Controlling references,** in which the package is the predecessor of the request, the successor of the request, or updates the request

- **Informational references,** in which the package is related to the request or the child of the request

Examples

- **Request waiting for a package**

  You can configure a request process to generate a package whenever an issue requires an application change solution. If the implementation of the application change is the main criteria for resolving an issue, the request is clocked from proceeding with its process until the generated package finishes its deployment.

- **Request and package processes running in parallel**

  You can configure a request process to generate a package and allow parallel work to proceed on the request while it waits for the completion of a deployment.

- **Package waiting for a request**

  A deployment process can allow its participants to define request references to address contingent issues that may be interfering with the package deployment. Designated participants can submit a request and block a package deployment until an issue is resolved.

- **Informational references**

  You can define references to establish request/package associations that do not necessarily hold up either process.

See Also

Packages (Package Process), *Requests (Request Process)*, *Security*, *Workflows*

For More Information

Table 2-60. Integration between requests and packages: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Integrating request and package workflows
Mercury Demand Management: Configuring a Request Resolution System	Integrating request and package workflows

Integration (Between Requests and Tasks)

Application(s)

- Demand Management

- Project Management

Definition

The following kinds of relationships can be established between tasks and requests:

- A controlling reference, in which a request is the successor of a task, a request is the predecessor of a task, or a task is updated by a request

- An informational reference, in which a request is related to a task

Examples

- **Resolving requests during project implementation**

  - By defining dependencies between tasks and requests, project managers can track company issues that may affect the initiative's success.

  - Project team members have a clear view of all efforts involved in completing a projects.

- **Standardizing the steps to completing a task**

  - Integrating tasks and requests allows you to enforce business rules that are standard to many projects and to automate the same executions available in request processes.

  - This approach can be implemented using the Task Updated By Request relationship, which automatically updates the status of a task as its corresponding request progresses through its workflow.

For More Information

Table 2-61. Integration between requests and tasks: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Integrating information from requests and tasks
Mercury Time Management User's Guide	Integrating information from requests and tasks

Interface (Open)

See *Open Interface*

Interface (Standard)

Definition

One of the two Mercury IT Governance Center interfaces. Consists of a menu bar (shown on the left in *Figure 2-21*), and a Dashboard (also called *Dashboard page*) and navigation path (the Dashboard and navigation path are shown on the right in *Figure 2-21*).
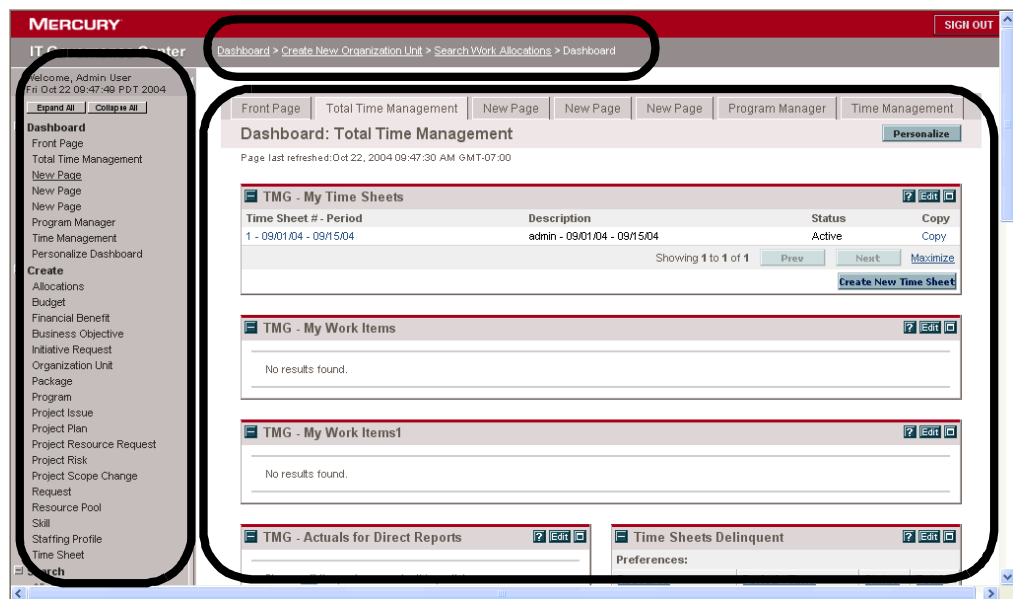
Figure 2-21. Standard interface

The standard interface does not require installation on the client machine, and requires system resources only when performing an activity. This interface accesses information from the database through Mercury IT Governance Server using a shared database session pool.

Subtopic(s)

Menus. Menus organize menu items, which are links to predefined pages. **Dashboard,** which is one of the Mercury-supplied default menus, is highlighted in *Figure 2-22*. Other default menus are **Create** and **Search.**

Submenus. Submenus are a second-level menus used to organize menu items. **Time Sheets**, which is a submenu of **Time,** is highlighted in *Figure 2-22*.

Menu Items. Menu items are individual items on the menu bar that are linked to a predefined page. The menu item highlighted in *Figure 2-22* is **Close Time Sheets.**
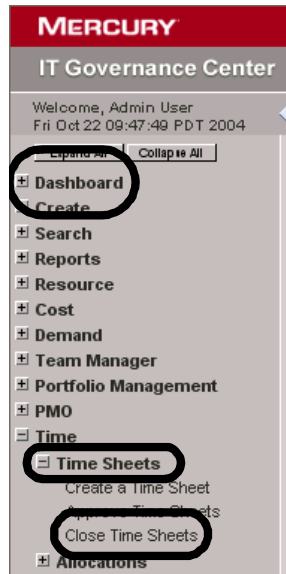
Figure 2-22. Standard interface: Menus, submenus, and menu items

Overview Pages. Dashboard pages that have multiple sections and are dependent on particular entities.

Navigation Path. The navigation path lists the pages opened during the current Dashboard session. You can access previously visited pages by selecting items in the path. As the list of visited pages grows, older accessed pages are scrolled off the path.

Figure 2-23 highlights the navigation path.
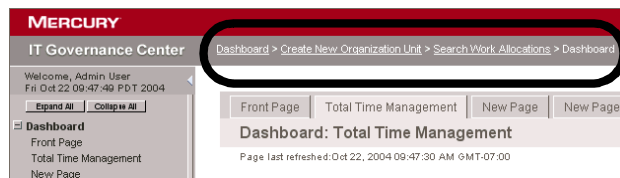
Figure 2-23. Standard interface: Navigation path

Portlets. Portlets are configurable, role-based visual displays that provide relevant summary information about business data.

The Dashboard in *Figure 2-21* contains five portlets, including My Time Sheets and My Work Items.

Mercury IT Governance Center has two types of portlets:

● **Mercury-supplied portlets**

Mercury provides many portlets as part of the Mercury IT Governance Center products.

● **Custom portlets**

Creating custom portlets involves writing SQL queries that access information from the database.

Portlets provide Mercury IT Governance Center users with real-time views and drill-down capability into data belonging to their IT processes. Portlets define the information to be displayed in their views. Users' Dashboard pages can be personalized to contain the portlets that show the data more meaningful to them.

Figure 2-24 shows the results of drilling down in the My Tasks portlet in *Figure 2-21*.

Figure 2-24. Portlet drilldown: Enter Time page

You configure portlets in the standard interface, as shown in *Figure 2-25*.
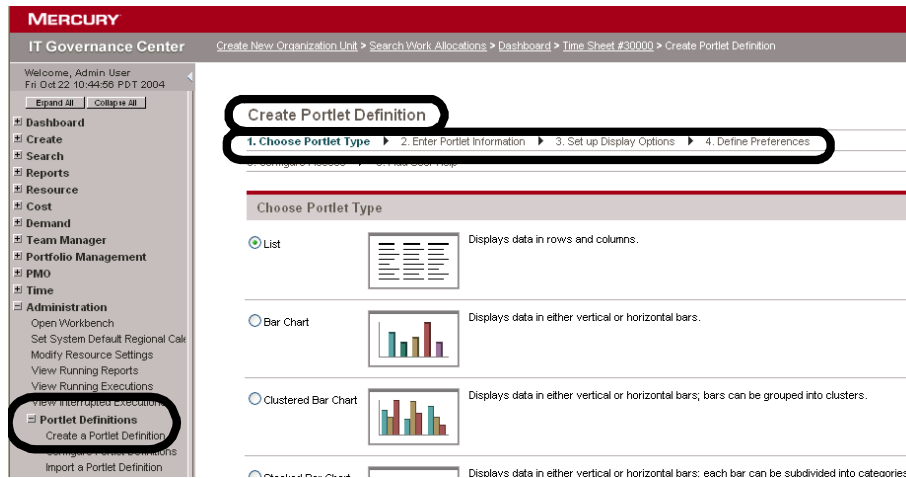
Figure 2-25. Portlet: Configuring

Portlet Builder. Wizard used to configure portlets step by step.

See Also

Dashboard, *Filter Criteria*, *Interface (Standard)*, *JSR 168 (Java Specification Request)*, *WSRP (Web Services for Remote Portlets)*

For More Information

Table 2-62. Interface (standard): Getting more information

Information Source	Sample Related Topics or Tasks
Configuring the Standard Interface	● Creating portlet definitions ● Configuring portlet definitions ● Importing portlet definitions
Getting Started	Logging on to Mercury IT Governance Center (standard interface)
Mercury Change Management User's Guide	Mercury-supplied portlets for Change Management
Mercury Demand Management User's Guide	Mercury-supplied portlets for Demand Management
Mercury Financial Management User's Guide	Mercury-supplied portlets for Financial Management

Table 2-62. Interface (standard): Getting more information [continued]

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management User's Guide	Mercury-supplied portlets for Portfolio Management
Mercury Program Management User's Guide	Mercury-supplied portlets for Program Management
Mercury Project Management User's Guide	Mercury-supplied portlets for Project Management
Mercury Resource Management User's Guide	Mercury-supplied portlets for Resource Management
Mercury Time Management User's Guide	Mercury-supplied portlets for Time Management
System Administration Guide and Reference	System environment
What's New in Release 6.0	• Interface improvements • New Dashboard • Upgrade impacts of the new Dashboard

Interface (Workbench)

Definition

One of the two Mercury IT Governance Center interfaces. The Workbench provides the functionalities that allow organizations to implement and manage governance processes. Requires the Open Workbench access grant.

Usage

The Workbench interface runs as a Java applet that is installed automatically when invoked on the client machine. This interface requires a dedicated (that is, socket) connection to Mercury IT Governance Server.

Access

To log on to the Workbench, select **Administration > Open Workbench** from the menu bar in the Mercury IT Governance Center standard interface, as shown in *Figure 2-26*.
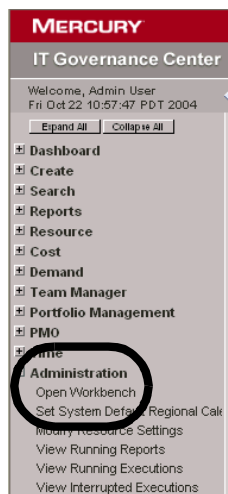
Figure 2-26. Workbench: Opening

The Workbench launch window is shown in *Figure 2-27*.
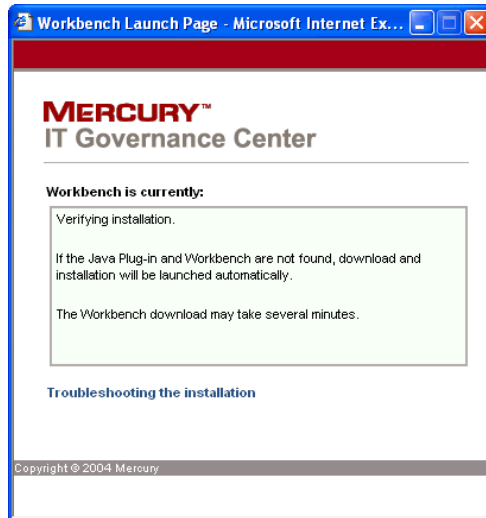
Figure 2-27. Workbench launch window

Figure 2-28 shows the Workbench interface. The Package Workbench screen is shown on the right. The Workbench menu bar is on the top.
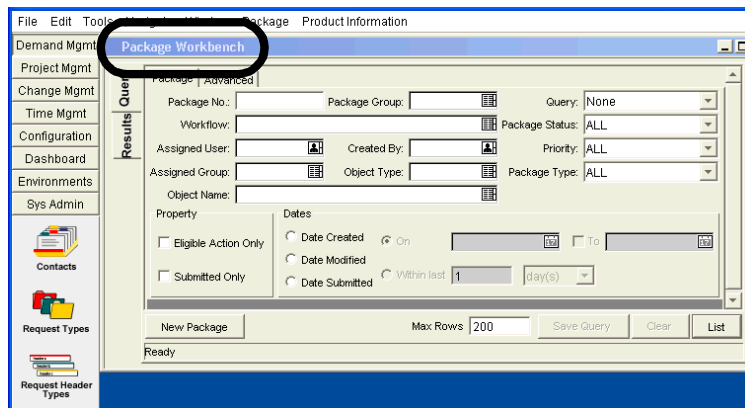
Figure 2-28. Workbench interface: Package Workbench

Subtopic(s)

Screens. Interactive, framed, and fixed areas displayed on bit-mapped computer displays.

In Mercury IT Governance Center, the term *screen* is used only in connection with the Workbench interface. The Workbench screen is the fixed display area on top of which windows float.

Figure 2-29 shows the screen in the Workbench interface.
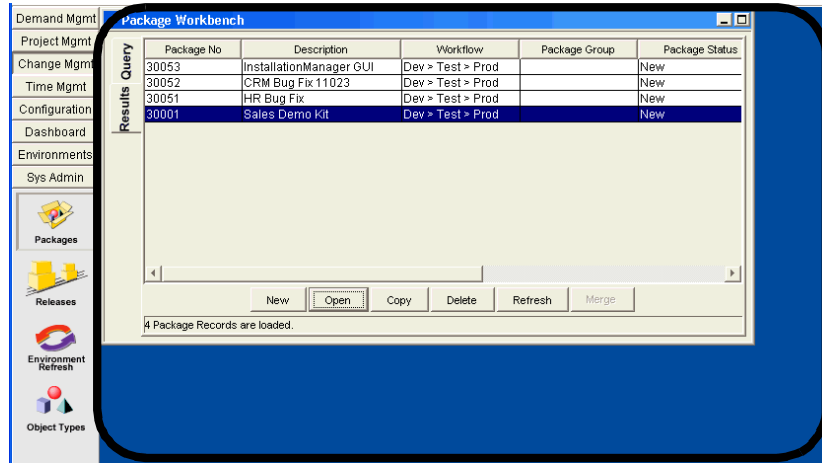
Figure 2-29. Workbench interface: Screen

Screen Groups. Buttons, which, when clicked, cause the names of screens in the screen group to be displayed. Examples screen groups are Demand Mgmt, Dashboard, and Environments.

See Also

Architecture, *Access Grants*, *Interface (Standard)*, *Single Sign-On Software*

For More Information

*Table 2-63. Interface (Workbench): Getting more information*

Information Source	Sample Related Topics or Tasks
Getting Started	Using the Workbench
Security Model Guide and Reference	Controlling access to screen groups
What's New in Release 6.0	Interface improvements

Internationalization

See *Localization*

Issues

Application(s)

- Change Management Extension for Oracle E-Business Suite
- Portfolio Management
- Program Management
- Project Management

Definition

In Mercury IT Governance Center, frameworks implemented using request types, that allow portfolio-, program-, and project-related concerns to be identified and resolved.

Issues can span multiple request types, which allows broader visibility into the issue resolution process.

Example(s)

In a request resolution system, software bugs and enhancement requests can be tracked as issues. Each of these request types could be processed in its own workflow, but they could share common fields for tracking purposes.

See Also

Requests (Request Process)

For More Information

Table 2-64. Issues: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Program Management Configuration Guide	Configuring issues
Mercury Program Management User's Guide	Logging program issues

ITIL (Information Technology and Infrastructure Library)

Definition

A representation of best practices for IT service management. ITIL, which was developed by the Office of Government of Commerce in the UK, comprises a series of books and reports that provide guidance on the quality provisions of IT services.

Usage

With its workflow and execution engines, Mercury IT Governance Center implements and enforces the kinds of processes that the ITIL literature describes.

Java

Audience

- Application developers or configurators
- System or instance administrators

Definition

A high-level programming language developed by Sun Microsystems.

Usage

Mercury IT Governance Center is a Java-based application.

See Also

Architecture, *JSR 168 (Java Specification Request)*, *JVM (Java Virtual Machine)*

For More Information

Table 2-65. Java: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center
System Requirements and Compatibility Matrix	• SDK requirements • Java plug-in requirements

JDK (Java Developer Kit)

See *SDK (Software Development Kit)*

JSP (Java Server Pages)

Audience

● Application developers or configurators

● System or instance administrators

Definition

An extension to the servlet technology developed by Sun Microsystems.

Usage

The Mercury IT Governance Center Web architecture is powered by a high-performance JSP engine.

All JSP and related files are located in:
`ITG_Home/Server/Kintana/Deploy/itg.war/web`

The directory structure maps directly to a URL page.

See Also

Architecture, *Server (Mercury IT Governance)*, *Web Servers*

For More Information

Table 2-66. JSP: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	● Installing Mercury IT Governance Center ● Upgrading Mercury IT Governance Center

JSR 168 (Java Specification Request)

Audience

● Application administrators

● Application developers or configurators

● System or instance administrators

Definition

A specification that defines a set of APIs for portlets, and addresses standardization for preferences, user information, portlet requests and responses, deployment packaging, and security.

JSR 168 was developed using JCP (Java Community Process) services, an open, international, community-based organization facilitating the development of Java standards.

Usage

Portlets in Mercury IT Governance Center are JSR 168 compliant.

See Also

Dashboard, *Portlets*, *WSRP (Web Services for Remote Portlets)*

For More Information

Table 2-67. JSR 168: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	System architecture

JVM (Java Virtual Machine)

Audience

- Application developers or configurators

- System or instance administrators

Definition

An abstract computing machine to implement the Java programming language.

Usage

The server machine that hosts Mercury IT Governance Server must also host the JVM.

For More Information

Table 2-68. JVM: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• System architecture • Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center

Keys

See *License Keys*

Layouts

Audience

- Application administrators
- Application developers or configurators

Definition

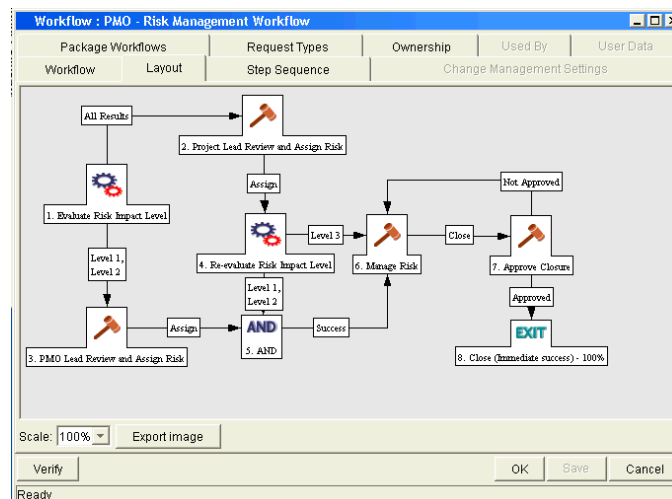Workspaces in which the steps and transitions of workflows are graphically defined (see *Figure 2-30*).

Figure 2-30. Layouts: Workflow

See Also

Transitions, *Workflows*

For More Information

Table 2-69. Layouts: Getting more information

Information Source	Sample Related Topics or Tasks
Documents in the Configuration category (as described in the *Guide to Documentation*)	Configuring workflows

LDAP (Lightweight Directory Access Protocol)

Audience

System or instance administrators

Definition

The *de facto* Internet directory standard.

Usage

Mercury IT Governance Center can be integrated with an LDAP server using either of the following approaches:

- Importing existing usernames from the LDAP server into the Mercury IT Governance Center database

- Using the LDAP server to authenticate users as they log on to Mercury IT Governance Center

See Also

Directories, *Server (Mercury IT Governance)*

For More Information

Table 2-70. LDAP: Getting more information

Information Source	Sample Related Topics or Tasks
Open Interface Guide and Reference	Generating or updating users from a database or LDAP server
System Administration Guide and Reference	Integrating with an LDAP server

Library

See *Documentation*

Licenses

Definition

Authorization granted to users of Mercury IT Governance Center to use one or more individual products.

Types

* **(User) administration**

    Authorization granted to user administrators, application developers, or configurators who do tasks like setting up users, assigning security, and configuring business processes in Mercury IT Governance Center.

* **Configuration**

    Authorization granted to system, instance, or database administrators or application developers or configurators who do tasks like install, upgrade, configure, and maintain Mercury IT Governance Center products.

    A configuration license is required for Mercury Change Management functions.

- **Application**

  Authorization granted to users who create or process work items in Mercury IT Governance Center.

  There are six application licenses for the Mercury IT Governance Center core applications: Mercury Change Management, Mercury Demand Management, Mercury Portfolio Management, Mercury Program Management, Mercury Project Management, and Mercury Time Management.

  Users with a Mercury Program Management license must also have licenses for Mercury Demand Management and Mercury Project Management.

  Users with a Mercury Portfolio Management license must also have a license for Mercury Demand Management.

  Mercury Financial Management and Mercury Resource Management are available to customers with any application license.

Figure 2-31 shows information available to administrators in the License Administration screen.

Figure 2-31. License Administration screen

See Also

Access Grants, *Security*

For More Information

Table 2-71. Licenses: Getting more information

Information Source	Sample Related Topics or Tasks
Security Model Guide and Reference	Assigning licenses
System Administration Guide and Reference	Application licenses
What's New in Release 6.0	• Simplified license model • New license model upgrade impacts

License Keys

Audience

- Application developers or configurators

- System or instance administrators

Definition

Information in a file about the number and types of Mercury IT Governance Center products purchased by an organization. A license key is required for each site running Mercury IT Governance Center.

License keys are IP address-dependent.

Usage

A license key is provided by Mercury when you purchase Mercury IT Governance Center products. When you purchase additional licenses for a given product or set of products, you need to contact Mercury Support to get a new license key that corresponds with the new number of users.

A license key is delivered as text strings stored in the `license.conf` file in the *ITG_Home*/`conf` directory. The `license.conf` file includes one general license text string and additional text strings for each licensed Mercury IT Governance Center product.

See Also

Installation, *Mercury IT Governance Center*, *Server (Mercury IT Governance)*

For More Information

Table 2-72. License keys: Getting more information

Information Source	Sample Related Topics or Tasks
Security Model Guide and Reference	Generating license keys
System Administration Guide and Reference	License keys

Load Balancing (Resource Management)

Audience

Application administrators

Definition

Methodology used by a project or demand manager to assign work items in a way that does not exceed the working capability of the individual resources involved.

Usage

Mercury Resource Management provides work assignment visualizations that help managers see when resources are overallocated or underallocated.

See Also

Resources (Resource Management)

For More Information

Table 2-73. Load balancing (resource): Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Resource Management User's Guide	Visualizing assignments to help resource load balancing

Load Balancing (System Administration)

Audience

System or instance administrators

Definition

A system configuration that uses an external Web server and the Mercury IT Governance Center Web server module to balance Web traffic across multiple Mercury IT Governance Servers.

See Also

Architecture, *Server (Mercury IT Governance)*, *Web Servers*

For More Information

Table 2-74. Load balancing (system): Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Configuring a load balancer

Localization

Definition

A version of a software application to support a specific geographic or language area.

Usage

With the appropriate Oracle database version and settings, the following applies to the localization of Mercury IT Governance Center:

- Data can be entered and forms and request types can be configured in any single- and double-byte language. Limitations to this include:

  - Right-to-left display is not supported.

  - Multi-byte characters may cause Oracle errors by exceeding Oracle column limitations in character text areas.

- Only localizations performed by Mercury are supported.

Logs

Audience

- Application administrators

- Application developers or configurators

- System or instance administrators

Definition

Information generated as a result of the execution of code.

Most of the logs generated by Mercury IT Governance Center are located in the *ITG_Home*/logs directory.

Types

- **Execution logs**

  HTML files that are automatically generated during the execution of commands in packages, requests, and validations.

  Execution logs are not purged automatically.

- **Report logs**

  HTML files that are automatically generated during the submission of reports.

  Since the information these logs contain is used only to troubleshoot report executions, you should consider deleting them regularly.

- **Server logs**

  Text files that record messages issued by the Mercury IT Governance Server. They provide information useful for debugging server-level issues.

  You should delete these files regularly unless there are pending server issues that still need to be resolved.

- **Execution debug logs**

  Data collected only if the server configuration parameter SERVER-DEBUG_LEVEL is set to HIGH.

  These files are used only for troubleshooting and can be deleted regularly.

- **Temporary logs**

  Temporary log files can be deleted regularly.

See Also

File System, *Server (Mercury IT Governance)*

For More Information

Table 2-75. Logs: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Getting information about the system from log files
What's New in Release 6.0	Enhancements to logging

Menus

See *Interface (Standard)*

Menu Bar

See *Interface (Standard)*

Menu Items

See *Interface (Standard)*

Mercury-Supplied Entities

See *Entities*

Microsoft Project

See *Project (Project Management)*

Migration (Entity)

Audience

- Application developers or configurators

- System or instance administrators

Definition

Entity migrators supplied as part of Mercury IT Governance Center manage Mercury entities across multiple database instances. Entity migration is XML-based and stores a given collection of entities to be migrated as a content bundle (a `zip` file).

Usage

- Migratable entities include object types, portlets, project templates, report types, request header types, request types, special commands, user data contexts, validations, and workflows.

- Migration configurations using the entity migrators and workflows allow you to automate and standardize a change control process for your Mercury IT Governance Center implementation.

- A content migration is processed by creating and submitting a package.

- Migrations accomplished using Mercury Change Management entity migrators can be done only between Mercury IT Governance Center instances at the same product version level.

See Also

Migration (Instance), *Migrator (Mercury GL)*, *Migrator (Mercury Object)*

For More Information

Table 2-76. Migration (entity): Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	- Migrating entities - Entity migrator object types

Migration (Instance)

Audience

System or instance administrators

Definition

Instance migrators migrate Mercury IT Governance Center system installations or instances.

See Also

Migration (Entity), *Migrator (Mercury GL)*, *Migrator (Mercury Object)*

For More Information

Table 2-77. Migration (instance): Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Migrating instances

Migrator (Mercury GL)

Application(s)

Change Management

Audience

- Application developers or configurators
- System or instance administrators

Definition

Mercury GL Migrator manages Oracle E-Business Suite General Ledger setup entities across multiple database instances.

See Also

Migration (Entity), *Migration (Instance)*, *Migrator (Mercury Object)*

For More Information

Table 2-78. Migrator (Mercury GL): Getting more information

Information Source	Sample Related Topics or Tasks
Mercury GL Migrator Guide	Installing, upgrading, configuring, maintaining, and using Mercury GL Migrator

Migrator (Mercury Object)

Audience

- Application developers or configurators

- System or instance administrators

Definition

Mercury Object Migrator manages Oracle E-Business Suite AOL (Application Object Library) objects across multiple database instances.

See Also

Migration (Entity), *Migration (Instance)*, *Migrator (Mercury GL)*

For More Information

Table 2-79. Migrator (Mercury Object): Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Object Migrator Guide	Installing, upgrading, configuring, maintaining, and using Mercury Object Migrator

Milestones

Audience

- End users

- Application administrators

Definition

Significant events in projects that usually involve the completion of one or more deliverables.

Usage

On Gantt charts, milestones appear as black diamonds.

Because milestones are usually markers, they usually do not have a time duration associated with them.

See Also

Gantt Charts, *Project (Project Management)*

For More Information

Table 2-80. Milestone: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	Setting milestones on project plans

Modules

Formerly Known As

Templates

Audience

Application administrators

Definition

Dashboard pages or sets of pages that administrators define for their end users.

Usage

Modules allow administrators to:

- Set up end users' Dashboards so they don't need to do it themselves
- Define different Dashboard pages for different end user roles
- Control updates to end users' Dashboards

Modules are delivered using one of the following methods:

- **Publishing**

    - When administrators publish modules to end users, the users cannot add, rearrange, edit, or remove the portlets in the module.

    - When administrators update a published module, end users who received a prior publication are automatically updated.

    - When published modules are no longer useful, administrators can remove them.

- **Distributing**

    - When administrators distribute modules to end users, the users can add, remove, rearrange, or edit the portets in the module.

    - When administrators update a distributed module, only end users in the updated distribution receive the module.

■ Administrators cannot remove distributed modules from end users' Dashboards. End users must remove the modules themselves.

● **Setting the default Dashboard**

The default Dashboard is the first page users see when they log on to Mercury IT Governance Center for the first time. The default Dashboard can be published or distributed.

Subsections

Self-service modules. Module created by an administrator and marked as self-service, meaning that certain users are authorized to add them to their Dashboards as sets of pre-configured pages.

Examples

Examples of when to use which delivery mechanism:

● **Publishing.** Administrator C creates a new portlet definition and updates the Help Desk page on many Dashboards.

● **Distributing.** User B has submitted a new Help Desk request. The request appears automatically on her Dashboard Help Desk page.

● **Distributing.** Users C and D both have the Product Manager Dashboard page (created using the distributed module setting). User D has all applications, but User E has changed her page to show only Support applications.

● **Setting the default Dashboard.** User E just logged on to his new Mercury IT Governance Center account. He sees a standard page on his Dashboard, which was created using the default module setting.

For More Information

Table 2-81. Modules: Getting more information

Information Source	Sample Related Topics or Tasks
Configuring the Standard Interface	- Creating module definitions - Distributing modules - Publishing modules - Removing published modules - Setting the default Dashboard
System Administration Guide and Reference	Mercury IT Governance Center Web server module

Multicurrency

See *Currencies*

Navigation Path

See *Interface (Standard)*

Notifications

Audience

- End users
- Application administrators
- Application developers or configurators

Definition

Automatic, email-based status updates that alert users when they need to perform actions on workflow steps. Notification can also be used to inform users of the start or finish date of a particular task.

Usage

In Mercury IT Governance Center, notifications are handled by the built-in notification engine.

See Also

Architecture, *Notification Templates*, *Transitions*, *Workflows*

For More Information

Table 2-82. Notification: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring notifications for workflow steps
Mercury Demand Management: Configuring a Request Resolution System	Configuring notifications for a request resolution system
Mercury Project Management User' Guide	Configuring notifications for project plan fields

Notification Engine

See *Architecture*

Notification Templates

Audience

- Application administrators

- Application developers or configurators

Definition

Preconfigured notifications that can be used to construct the body of a message.

Usage

In Mercury IT Governance Center, notification templates can be used with packages, projects, releases, reports, requests, tasks, and workflows.

Interface (Workbench)
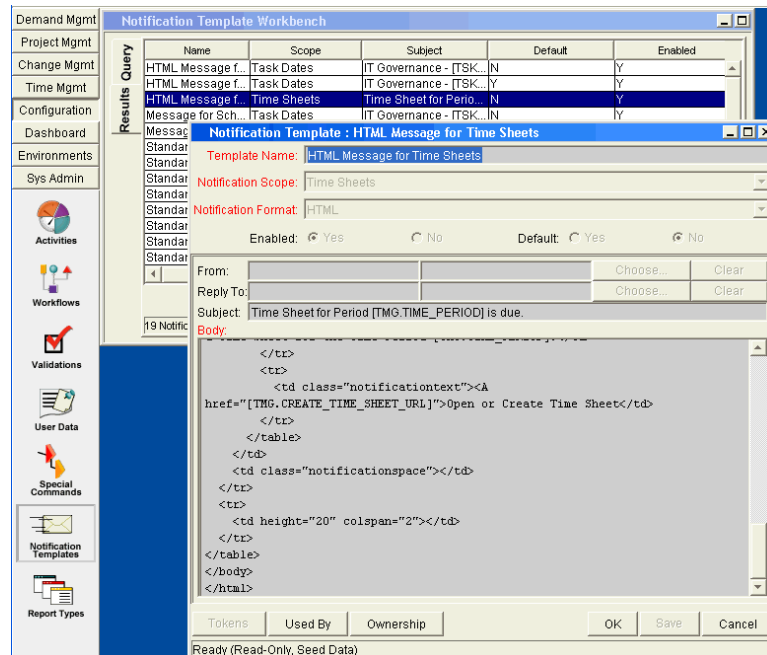
Figure 2-32. Notification Template Workbench

For More Information

Table 2-83. Notification templates: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring notification templates
Mercury Demand Management: Configuring a Request Resolution System	Configuring notification templates

NPV (Net Present Value)

Application(s)

Portfolio Management

Definition

A financial metric similar to ROI (return on investment), but that discounts future cash flows based on a user-input cost of capital.

Usage

NPV appears in all Mercury Portfolio Management entities, and can be used in Portfolio Management visualizations and analyses.

If neither NPV nor ROI is a satisfactory financial metric to use in gauging portfolio success, Mercury IT Governance Center customers can define and configure a custom metric.

See Also

Finance (Financial Management), *Portfolio (Portfolio Management)*, *ROI (Return on Investment)*

For More Information

Table 2-84. NPV: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Setting NPV

Objects

See *Entities*

Object Migrator

See *Migrator (Mercury Object)*

Object Types

Application(s)

- Change Management
- Change Management Extensions

Definition

Provide the ability to automate different types of software changes—for example, moving files, interfacing with third-party applications, and compiling and running programs.

Types

Mercury IT Governance Center has three types of objects:

- **Standard objects (entities).** These Mercury-supplied objects are shipped with Mercury Change Management or one of the Mercury Change Management Extensions (for example, File Migration or SQL Script).

- **Custom objects (entities).** These objects are standard objects that have been modified, or objects created by customers to handle special configuration requirements or integration with third-party tools.

- **Migrator objects (entities).** These objects contain functionality to export and import configuration information.

  Migrator objects can be used for several purposes:

  - To transfer configuration information between Mercury IT Governance Center instances

  - To extract information from a Mercury IT Governance Center database schema into an XML file

Usage

An object type consists of the following elements:

- Parameter fields that define the set of inputs needed to perform the deployment

- Commands that determine the object's behavior as it moves from one environment to another

  For example, a file object type might require only copying, but a script object might require both copying and executing.

Additional information:

- Object types automate the collection of data and the execution of operations for migrating software changes.

- Because different migration rules apply to each type of component, you can configure object types according to the requirements of your applications.

- When a package line reaches a specific workflow execution step, the commands defined in the object type are executed.

Examples

Example processes you can automate with object types:

● HTML application: FTP from location 1 to location 2

● Java application: Check out, compile code, FTP from location 1 to location 2

● Data object: FTP from location 1 to location 2, execute script, delete file

Interface (Workbench)
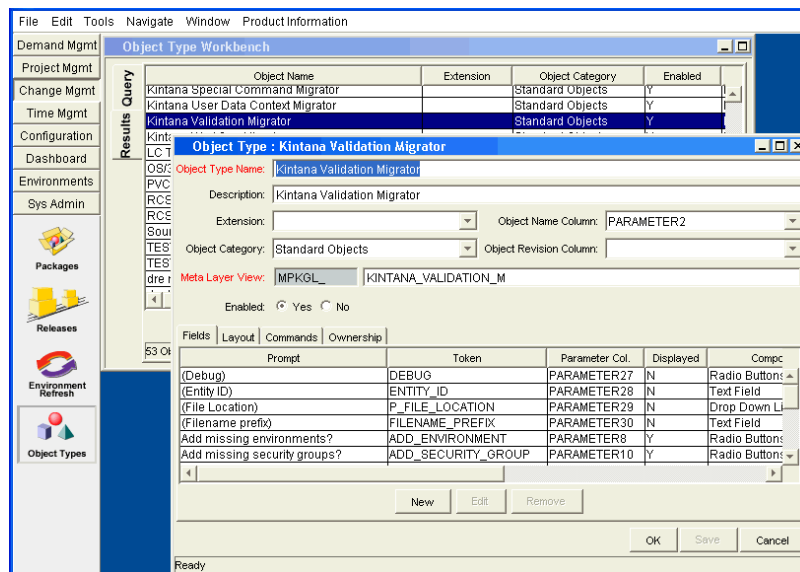
Figure 2-33. Object Type Workbench

See Also

Change Management (Mercury Change Management), *Mercury IT Governance Center*, *Object Types*, *Packages (Package Process)*

For More Information

Table 2-85. Object type: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management Configuration Guide	Configuring object types
Mercury Change Management User's Guide	Packages and object types

Object Type Commands

Application(s)

- Change Management

- Change Management Extensions

Definition

Figure 2-34 shows object type commands.
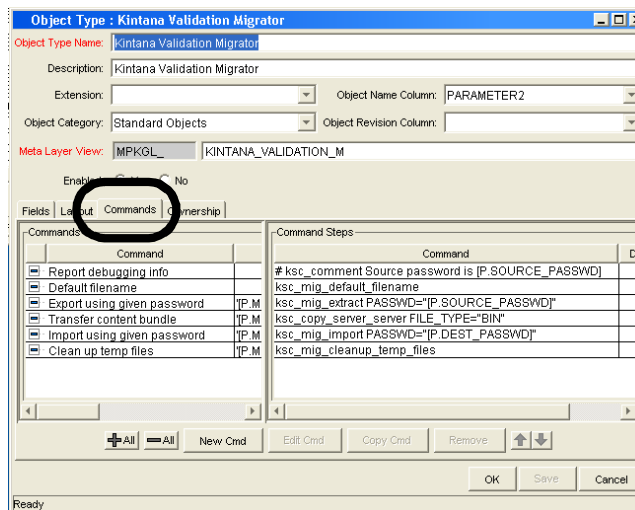
Figure 2-34. Object type commands

Examples

- **Connecting to a remote machine**

    - Use `ksc_connect` and `ksc_exit`.

    - Use `ksc_connect` to initiate a remote session (either telnet or ssh) with the server or client of a specified environment.

    - Once the connection has been opened, you can send UNIX commands directly to the target machine.

    - Opening a remote session with an object type command also gives you access to the command-line interface of any application residing on the remote machine.

    - Use `ksc_exit` to close the connection.

- **Transferring files between machines**

    - Use `ksc_copy`, which follows this procedure:

        - Establishes an FTP or SCP connection to the source machine.

        - Navigates to the designated directory on the source machine.

        - Establishes an FTP or SCP connection to the target machine.

        - Navigates to the designated directory on the target machine.

        - Transfers the specified file from the source environment to the target environment.

See Also

Commands, *Objects*, *Object Types*, *Tokens*

For More Information

Table 2-86. Object type commands: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	- Configuring commands - List and descriptions of all `ksc` commands

Oracle Database

See *Architecture*

Open Interface

Audience

- Application developers or configurators

- System or instance administrators

Definition

The Mercury IT Governance Center interface that is publicly accessible to other software products.

See Also

Third-Party Applications

For More Information

Table 2-87. Open Interface: Getting more information

Information Source	Sample Related Topics or Tasks
Open Interface Guide and Reference	- Generating or updating users from a database or LDAP server - Importing an organizational model - Generating requests and packages - Performing workflow transactions for package lines and requests

Organization Models

Application(s)

Resource Management

Definition

Representations in Mercury Resource Management of the relevant reporting structures and associations within organizations.

See Also

Organization Units, *Project (Project Management)*, *Resources (Resource Management)*

For More Information

Table 2-88. Organization models: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Resource Management User's Guide	• Building organization models • Maintaining organization models
Open Interface Guide and Reference	Importing organizational models
Security Model Guide and Reference	Controlling access to organization models

Organization Units

Application(s)

Resource Management

Definition

Building blocks of an organization model.

Usage

A single organization unit can be made up of any relevant collection of resources—for example, a single team and its manager.

Organization units can be linked to security groups (that is, the organization unit can define the security group's membership).

See Also

Organization Models, *Project (Project Management)*, *Resources (Resource Management)*, *Security Groups*

For More Information

Table 2-89. Organization units: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Resource Management User's Guide	Working with organization units
Security Model Guide and Reference	Controlling access to organization units

Override Rules

Application(s)

Time Management

Definition

Mechanisms to override default cost rates and other default cost-related attributes associated with time sheets.

Usage

Override rules consist of two parts:

- Dependencies, which are attributes required to initiate an override rule

- Results, which indicates what happens when an override rule's dependencies are met

For example, all time worked on a given project (the dependency) specifies a particular cost rate (the result).

See Also

Calendars, *Project (Project Management)*, *Time (Time Management)*, *Time Sheets*

For More Information

Table 2-90. Override rules: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Maintaining override rules
Mercury Time Management User's Guide	Using override rules

Ownership

Definition

Restricts who can edit an entity.

Usage

You should set configuration ownership when Mercury IT Governance Center products are used by multiple departments, each managing its own custom configurations.

Interface (Workbench)
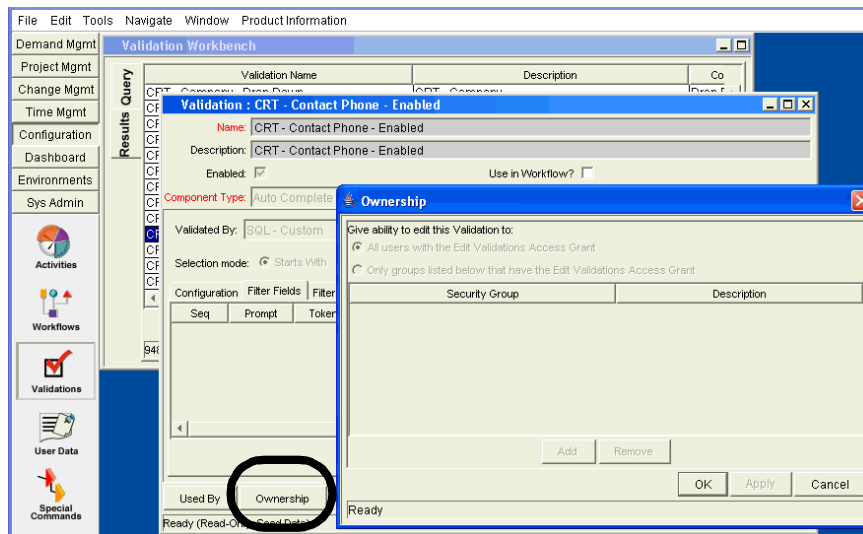
Figure 2-35. Ownership window in the Validation Workbench

See Also

Validations

For More Information

Table 2-91. Ownership: Getting more information

Information Source	Sample Related Topics or Tasks
Security Model Guide and Reference	Setting configuration ownership

Packages (Package Process)

Application(s)

Change Management

Definition

The files and information required for a successful software deployment.

Usage

The package process automates and implements best practices for deploying application changes for packaged applications, custom applications, legacy systems, and Web content. The process helps to monitor and deploy together different types of objects for each application change.

Mercury Change Management can streamline and automate software change deployments regardless of platform (for example, UNIX or Windows XP), type of change (for example, code or content), environment (for example, Java or C), or application (for example, Oracle or SAP).

A package contains information about the source and target environments, and the objects to be migrated. A package is processed by means of a business workflow deployed by the Mercury Change Management built-in Java execution engine.

Subtopic(s)

Package Lines. Each object in a package is on a separate package line. Each package line can be acted on separately, but the entire package moves as a logical unit.

Example(s)

Organization A has a package process to handle all changes to its Web application. The process consists of a package workflow that models the application's lifecycle, and object types that encapsulate the logic for migrating and post-processing each type of application component.

Interface (Workbench)
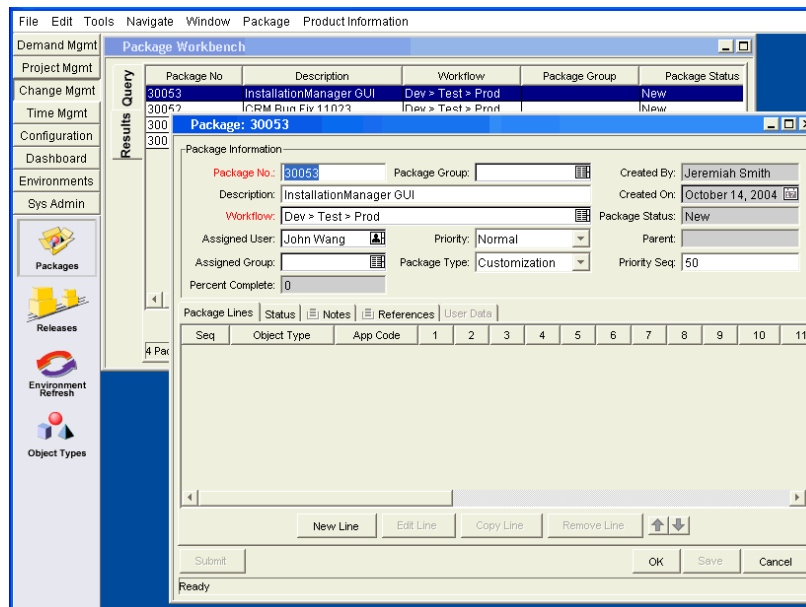
Figure 2-36. Package Workbench

See Also

Software Deployment, *Workflows*

For More Information

Table 2-92. Packages: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Adding packages to releases
Mercury Change Management User's Guide	• Creating packages • Adding package lines • Searching for packages
Open Interface Guide and Reference	Package open interface

Package Lines

See *Packages (Package Process)*

Package Workflows

See *Packages (Package Process)*

Pages

See *Interface (Standard)*

Parameters

Audience

- Application administrators
- Application developers or configurators
- System or instance administrators
- Database administrators

Definition

- Synonyms for filter fields in a report
- Server configuration settings

  For example, the parameters set using the `server.conf` file located in the `ITG_Home/bin` directory.

- Database columns in which field data is stored

See Also

Fields, *Object Types*, *Requests (Request Process)*, *Reports*, *Server (Mercury IT Governance)*

For More Information

Table 2-93. Parameters: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Server configuration parameters

Participants

Definition

Users involved in a particular process.

Usage

For the process of moving a package through a workflow, participants might be:

- The assigned-to user

- A member of the assigned group

- The creator of the package

- A member of a security group associated with any of the workflow steps contained in the workflow

Depending on the settings configured by the administrator, a package might not be visible to users who are not participants in its associated workflow. Additionally, users running reports will see information only for those packages for which they are considered to be participants.

See Also

Packages (Package Process), *Workflows*

For More Information

Table 2-94. Participants: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Identifying participants and security
Mercury Demand Management User's Guide	Overriding request participant restrictions
Mercury Project Management User's Guide	Setting project plan participant restrictions
Security Model Guide and Reference	Overriding participant restrictions

Passwords

Definition

Encrypted keywords that allow users to log on to Mercury IT Governance Center.

See Also

Interface (Standard), *Server (Mercury IT Governance)*

For More Information

Table 2-95. Passwords: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Passwords required during installation or upgrade

Patches

Audience

System or instance administrators

Definition

Product distributions sent out to customers between product releases.

Usage

Mercury develops patches on an as-needed basis to fix bugs in Mercury IT Governance Center. Upgrade scripts for new product releases include all patches to relevant prior releases.

You can download patches and upgrades from the Mercury IT Governance Download Center.

You apply a patch using the kDeploy.sh script.

See Also

Download Center (Mercury IT Governance), *Upgrade*

For More Information

Table 2-96. Patches: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Installing product patches

Performance

Definition

Effectiveness of system operation.

Usage

The following are key factors that affect Mercury IT Governance Center performance:

- Oracle database settings

- Software and hardware settings

- Mercury IT Governance Server configuration settings

See Also

Architecture, *Server (Mercury IT Governance)*

For More Information

Table 2-97. Performance: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	- Configuring the Oracle database - Tuning system performance - Adjusting the Server configuration parameters

Periods

Also Called

Time period

Application(s)

Time Management
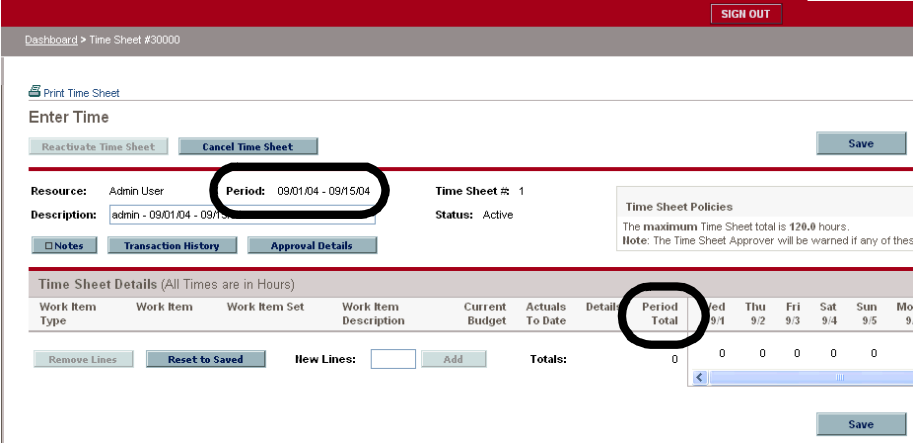
Definition

The actual dates of a given period type—for example, May 1, 2004 through May 15, 2004.

Usage

A given time sheet displays all days in the relevant time period.

Interface (Standard)

Figure 2-37. Period information in a time sheet

See Also

Calendars, *Period Types*, *Resources (Resource Management)*, *Time (Time Management)*

For More Information

Table 2-98. Periods: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Configuring time sheet policies
Mercury Time Management User's Guide	Creating time sheets

Period Types

Application(s)

Time Management

Definition

Specifications of intervals for which time sheets record information.

Example(s)

Examples of period types are weekly, semi-monthly, and monthly.

See Also

Calendars, *Periods*, *Resources (Resource Management)*, *Time (Time Management)*

For More Information

Table 2-99. Period types: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Configuring time sheet policies
Mercury Time Management User's Guide	Creating time sheets

Permissions

Definition

Various security-oriented mechanisms in Mercury IT Governance Center that are used to control access to applications and entities.

See Also

Access Grants, *Resources (Resource Management)*, *Security*, *Security Groups*, *Staffing Profiles*

For More Information

Table 2-100. Permissions: Getting more information

Information Source	Sample Related Topics or Tasks
Security Model Guide and Reference	Configuring security

Personalization

Definition

A method by which users can customize the portlets on their Dashboard page in one of the following ways:

- Filtering for the specific information they need

- Organizing how the information should be displayed

- Adding or removing Dashboard pages from the Dashboard

Usage

Published portlets cannot be personalized.

Interface (Standard)
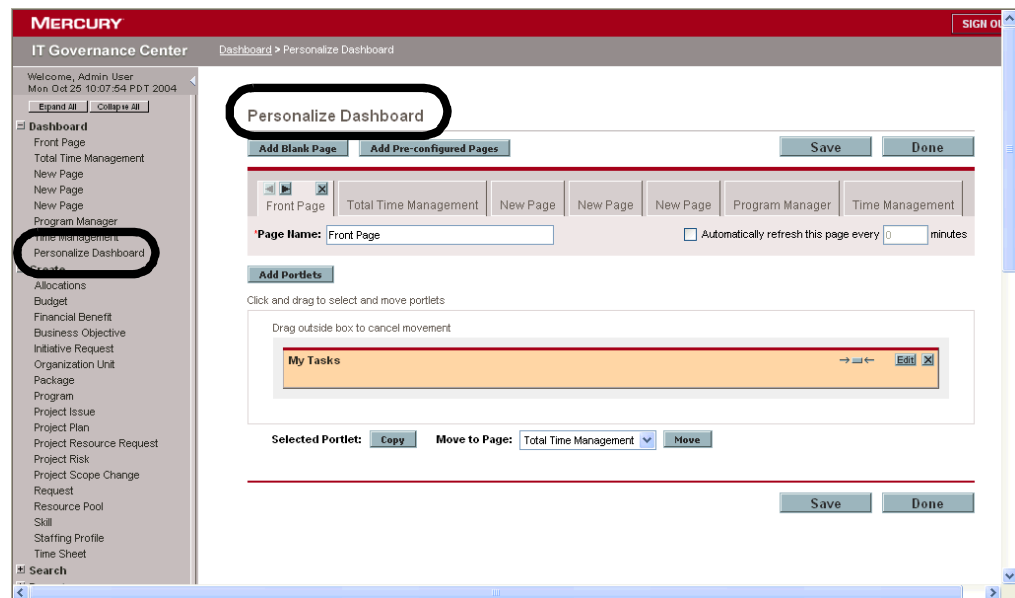
Figure 2-38. Personalization: Personalize Dashboard page

See Also

Portlets

For More Information

Table 2-101. Personalization: Getting more information

Information Source	Sample Related Topics or Tasks
Configuring the Standard Interface	Modules
Getting Started	Personalizing Dashboards

Plans Versus Actuals

Application(s)

- Project Management

- Resource Management

Definition

Differences between planned activities and actual results.

See Also

Actuals

For More Information

Table 2-102. Plans versus actuals: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	• Plan versus actual cost in project plans • Plan versus actual dates in project plans • Plan versus actual effort in project plans
Mercury Resource Management User's Guide	Plan versus actual staffing profile numbers

PMBOK (Project Management Book of Knowledge)

Application(s)

Portfolio Management

Definition

A collection of processes and knowledge areas generally accepted as best practice within the project management discipline.

Usage

Mercury IT Governance Center solutions follow PMI's PMBOK methodologies (among others).

Polling

Audience

- Application administrators

- Application developers or configurators

Definition

A workflow decision step option that requires the decision to be made by multiple users rather than a single user.

Usage

- Participation required for a poll can be designated as **All** or **At Least One.**

- Polling must be configured in the step source before a workflow step is created from the step source.

See Also

Workflows

For More Information

Table 2-103. Polling: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	• Specifying the poll participants in workflow steps • Defining No Consensus transitions • Delegating polling decision steps
Mercury Demand Management: Configuring a Request Resolution System	• Specifying the poll participants in workflow steps • Defining No Consensus transitions • Delegating polling decision steps

Portfolio (Portfolio Management)

Definition

The practice and process of analyzing the collection of proposals, projects, and assets (collectively called a *portfolio*) to help achieve an organization's business goals.

Usage

Mercury Portfolio Management provides a real-time governance process that supports strategic, financial, functional, and technical requirements. This product helps align IT portfolios with business strategies to maximize portfolio value.

Mercury Portfolio Management handles the following areas of portfolio management:

- Project initiation

- Project prioritization and categorization

- What-if (scenario) analysis

- Benefit realization

Interface (Standard)
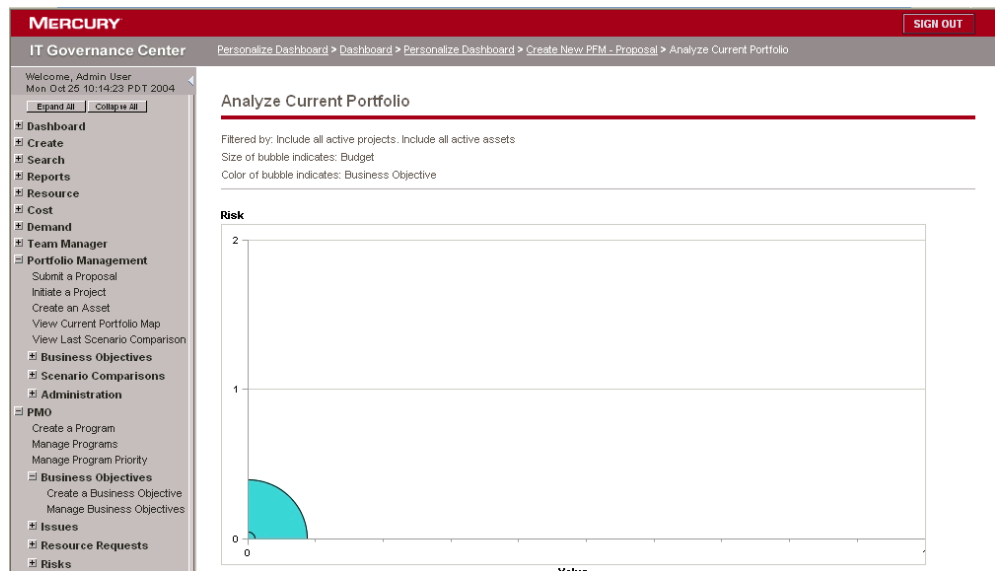
Figure 2-39. Portfolio Management: Analyze Current Portfolio page

See Also

Assets, *Budgets*, *Project (Project Management)*, *Proposals*, *Staffing Profiles*, *What-If Analysis*

For More Information

Table 2-104. Portfolio Management: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Portfolio Management application description
Mercury Portfolio Management Configuration Guide	Configuring Portfolio Management
Mercury Portfolio Management User's Guide	Working with your portfolio
What's New in Release 6.0	• What-if portfolio scenarios • Enhanced portfolio security

Portlets

See *Interface (Standard)*

Portlet Builder

See *Interface (Standard)*

Portlet Help

Audience

- Application administrators
- Application developers or configurators

Definition

Information for end users that is configured into request types and contains information at the request, section, or field level.

Access
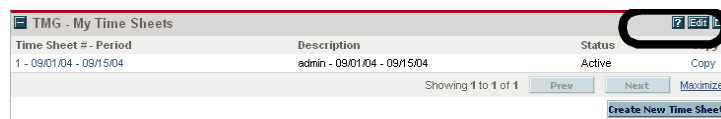
Figure 2-40. Portlet help: Accessing

Figure 2-41. Portlet help: Help with TMG - My Time Sheets

Interface (Workbench)
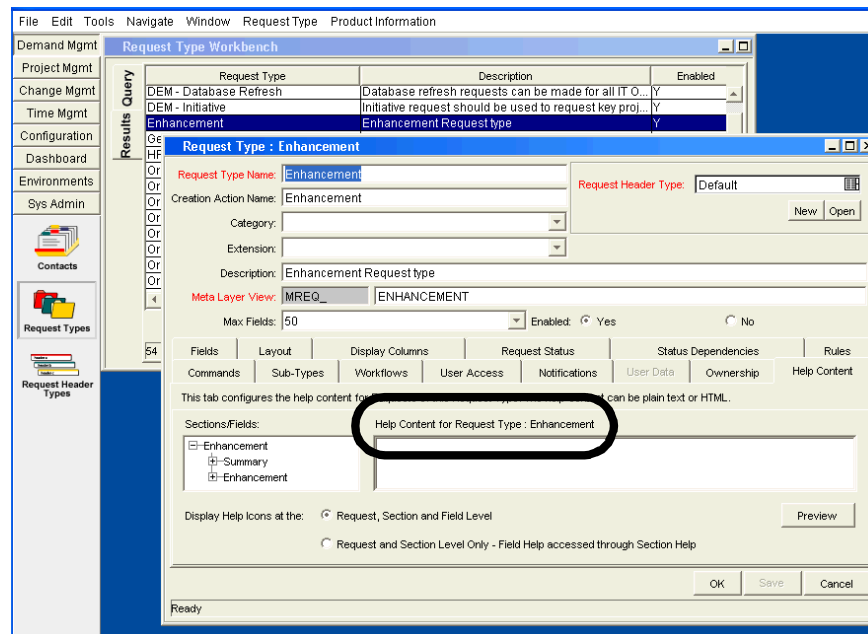
Figure 2-42. Portlet help: Entering

Usage

●   In a Dashboard page, a help icon (a question mark) appears in the title bar for an item where portlet help is available.

●   Icons can appear next to a request type name, a section name, or a field name, depending on the level of help available.

●   When users select the help icon, a help page opens another Web browser window.

See Also

Documentation, *Requests (Request Process)*

For More Information

Table 2-105. Portlet help: Getting more information

Information Source	Sample Related Topics or Tasks
Configuring the Standard Interface	Adding user help to a portlet definition
Guide to Documentation	Help for portlets and request types

Primary Object Migrator Host

Application(s)

- Mercury GL Migrator

- Mercury Object Migrator

Definition

The instance of Oracle E-Business Suite on which Mercury Object Migrator (and, optionally, Mercury GL Migrator) are installed and run by default.

If the database for Mercury IT Governance Center and Mercury Change Management Extension for Oracle E-Business Suite are installed on the same server, this is local (single database) integration.

If the database for Mercury IT Governance Center and Mercury Change Management Extension for Oracle E-Business Suite are installed on different servers, this is linked integration.

See Also

Migrator (Mercury GL), *Migrator (Mercury Object)*

For More Information

Table 2-106. Primary object migrator host: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Object Migrator Guide	Database links
System Administration Guide and Reference	Database links

Product Enhancement Requests

See *Requests (Request Process)*

Product Information (Mercury IT Governance Center)

See *Documentation*

Product Screen Security

See *Security*

Program (Program Management)

Definition

A collection of projects and associated scope changes, risks, issues, and resource requests.

Usage

Mercury Program Management helps to make large-scale IT governance activities more efficient. This application helps users to manage program initiation, scope change, risk assessment, and issues resolution. The project management office (PMO) processes built into the application allow users to model and enforce corporate standards while keeping stakeholders and team members aligned at every step.

In Mercury IT Governance Center, a program is usually an umbrella entity for various projects. For example, a program is created to oversee the upgrade of Company A's customer service computer system to better meet the needs of the sales force. The Customer Service, Sales, and IT organizations will create their own projects related to this program.

Changes and proposed changes at both the program and project level are tracked together.

Programs in Mercury Program Management feature drill-down into projects and requests, as well as roll-ups of relevant data from projects and requests.

A program manager responsible for the parent program can therefore:

- Oversee the milestones and deliverables of all the related projects
- Identify and mitigate risk
- Resolve inter-project issues
- Manage the allocation of program resources to the individual projects
- Act on program requests initiated by stakeholders

Interface (Standard)

Figure 2-43. Programs: Prioritize Programs page

See Also

Finance (Financial Management), *Portfolio (Portfolio Management)*, *Project (Project Management)*, *Requests (Request Process)*

For More Information

Table 2-107. Program Management: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Program Management application description
Mercury Program Management Configuration Guide	Configuring Program Management
Mercury Program Management User's Guide	Using Program Management
What's New in Release 6.0	Increased integration between program and project management

Project (Project Management)

Definition

Mercury Project Management collects and tracks information required to describe a business or technical initiative.

Projects formalize the definition and processing of business initiatives—for example, mergers and acquisitions, ISO 9000 certification, new hire processing, and software development.

Related projects often operate under the umbrella of a program.

Usage

Mercury Project Management enables collaborative project management for repetitive projects (for example, developing new e-commerce functionality). Mercury Project Management integrates project and process control, and uses task-level workflows to augment work breakdown structure with best practices processes.

Mercury Project Management also:

- Provides automation to proactively push tasks to assigned resources

- Gathers status updates and other information required by a project from all members of the project team

- Provides project managers control and visibility throughout the project lifecycle

Subtopic(s)

Master Projects. Groups of subprojects and tasks that define a business initiative.

Subprojects. Logical group of tasks that helps break up a master project into manageable pieces.

Project States. Definition of a particular stage of a project lifecycle (for example, Active, On Hold, or Completed).

Project Plans. An organized and ordered list of tasks that needs to be completed to accomplish a business initiative.

Project plans are active entities that gather information as projects move through their lifecycle. Project managers revise project plans as issues arise; resources post task and deliverable status information, and completion dates.

Project Templates. Models from which you can create project plans.

Interface (Workbench)

The interface for Mercury Project Management has a Project Workbench and a Task Workbench (see *Figure 2-44*).
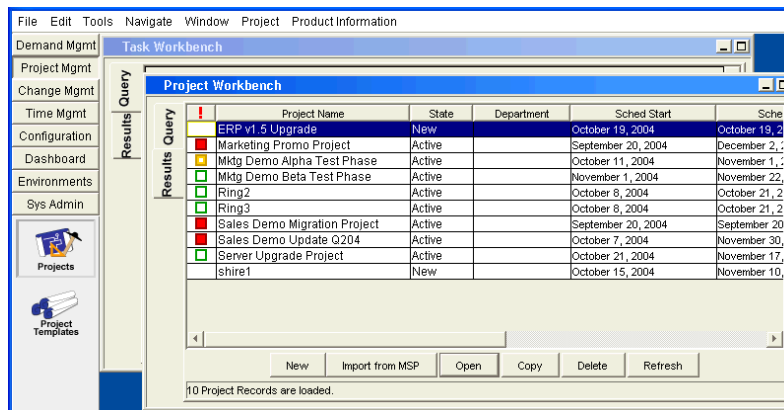
Figure 2-44. Project Management: Project and Task Workbenches

Figure 2-45 shows a project template open in the Project Template Workbench.
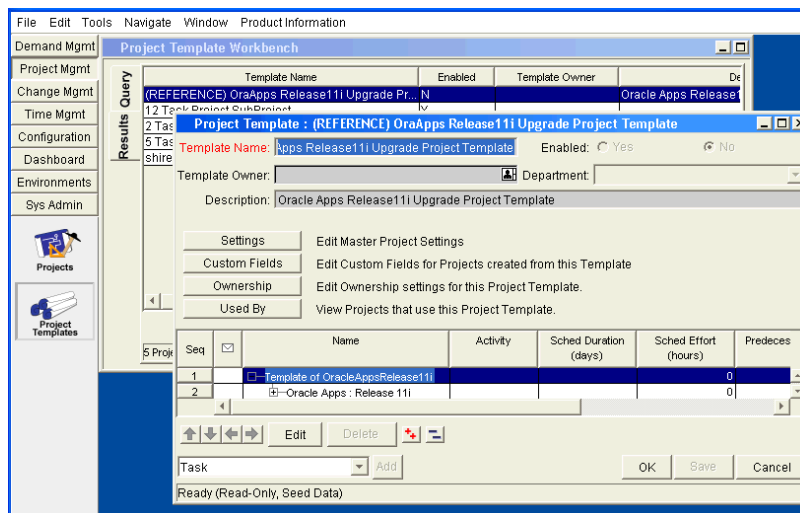
Figure 2-45. Project Management: Project Template Workbench

See Also

Assets, *Asset Classes*, *Microsoft Project*, *Program (Program Management)*, *Proposals*, *Tasks*

For More Information

Table 2-108. Project Management: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Project Management application description
Mercury Portfolio Management User's Guide	Linking to project plans
Mercury Project Management User's Guide	• Processing tasks • Creating project plans
What's New in Release 6.0	New features: • Increased integration between program and project management • Conversion of Project Management functions to HTML Upgrade impacts: • Time tracking • Ties between actuals • Skill rates • What-if analysis • Time sheet policies

Project Classes

Application(s)

Portfolio Management

Definition

Portfolio management classifications according to the expected area of benefit. For example:

- **Core (Keep the Lights On).** These projects maintain existing business applications and services. Example: Fixing bugs for an existing application.

- **Efficiency.** These projects help automate the basic transactions of an organization. They are intended to reduce costs and boost productivity by improving business processes and operational overhead. Examples: Automating password resets and implementing a self-service human resources portal.

- **Growth.** These projects contribute directly to improvements in performance, which is measured in speed, convenience, cost of business operations, working capital required, and quality. Examples: Implementation of CRM (customer resource management) and supply-chain planning.

- **Innovation.** These projects provide the promise of a major change to business performance. Example: Re-engineering a product's development process to increase time to market.

Proposals, projects, and assets can be classified according to project class, asset class, or both simultaneously.

See Also

Portfolio (Portfolio Management), *Project (Project Management)*

For More Information

Table 2-109. Project classes: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Project Management application description
Mercury Portfolio Management User's Guide	Setting project classes

Proposals

Application(s)

Portfolio Management

Definition

Entities created and used to justify projects.

Information in proposals can include:

● Business objectives

● Scoring information

● Requirements documentation

● Budget information

Usage

If a proposal is approved, a project is automatically generated, as well as a corresponding budget, staffing profile, and financial benefit.

Interface (Standard)

Figure 2-46. Proposals: Create New PFM - Proposal page

See Also

Budgets, *Finance (Financial Management)*, *Project (Project Management)*, *Staffing Profiles*

For More Information

Table 2-110. Proposals: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Creating proposals

Qualitative Scoring

Application(s)

Portfolio Management

Definition

A method of ranking proposals, projects, and assets that is not based on purely numeric values of cost, resource requirements, and benefits.

Usage

The information is typically considered by review boards and can include criteria like:

- Technical risk
- Alignment with strategic goals
- Competitive advantage to be gained

See Also

Assets, *Portfolio (Portfolio Management)*, *Project (Project Management)*, *Proposals*

For More Information

Table 2-111. Qualitative scoring: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Configuring the qualitative scoring key
Mercury Portfolio Management User's Guide	Using qualitative scoring

Rates (Financial Exchange)

See *Finance (Financial Management)*

Reference Copies of Mercury-Supplied Entities

Definition

Many entities (for example, requests and object types) have read-only reference (REFERENCE) copies supplied by Mercury to use as the basis for customized copies.

See Also

Entities

References

Definition

Additional entities or information sources for a given Mercury IT Governance Center entity. For example, for a package entity the available references might be a document attachment, a document URL, a request, a task, and a project.

Usage

References can have dependencies associated with them—for example, a task can be configured to wait for a referenced request to finish before being marked as complete. A new request can be created from a task as a reference.

Document attachments can be placed under the control of the document management functionality in Mercury IT Governance Center.

Interface (Standard)
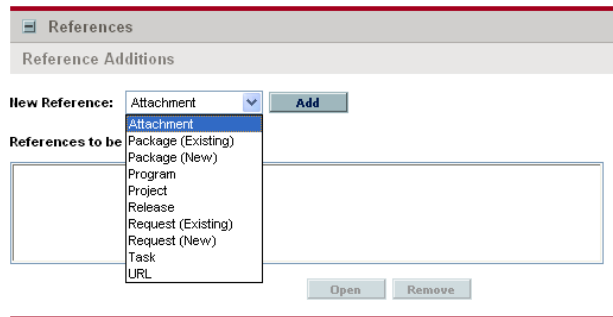
Figure 2-47. References: Adding a reference

See Also

Document Management, *Packages (Package Process)*, *Project (Project Management)*, *Requests (Request Process)*, *Tasks*

For More Information

Table 2-112. References: Getting more information

Information Source	Sample Related Topics or Tasks
Document Management Guide and Reference	Using document management with attachments
Mercury Change Management User's Guide	Attaching references
Mercury Demand Management User's Guide	Attaching references
Mercury Program Management User's Guide	Attaching references
Mercury Project Management User's Guide	Attaching references

Releases

Application(s)

Change Management

Definition

Groups of packages and their related requests that must be deployed together.

See Also

Change Management (Mercury Change Management), *Deployment*, *Release Managers*

For More Information

Table 2-113. Releases: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring releases and distributions

Release Managers

Application(s)

Change Management

Definition

Persons responsible for overseeing and executing the delivery of applications or software releases. Release managers typically add packages and requests to releases, set dependencies, and create and process release distributions.

See Also

Change Management (Mercury Change Management), *Deployment*, *Releases*

For More Information

Table 2-114. Release managers: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring releases and distributions

Reports

Definition

Information about one or more specific entities or configurations in Mercury IT Governance Center.

Types

Mercury IT Governance Center produces two types of reports:

- **Application-level reports**

  Mercury IT Governance Center provides three approaches for application-level reporting:

  - Mercury-supplied report types

  - User-created custom reports

  - Reporting using third-party applications

  Application-level reports are run in the standard interface.

- **Server-level reports**

  Server-level reports are run in the Workbench interface.

Subtopic(s)

Report Conversion. Reference to the conversion in release 6.0 of Mercury IT Governance Center of the application-level reports to run in the standard interface.

Report Types. A general category defining the structure of a report. Determines the logic behind the storage and manipulation of data within a report**.**

Interface (Standard)

Figure 2-48. Reports: Search Reports page

Interface (Workbench)
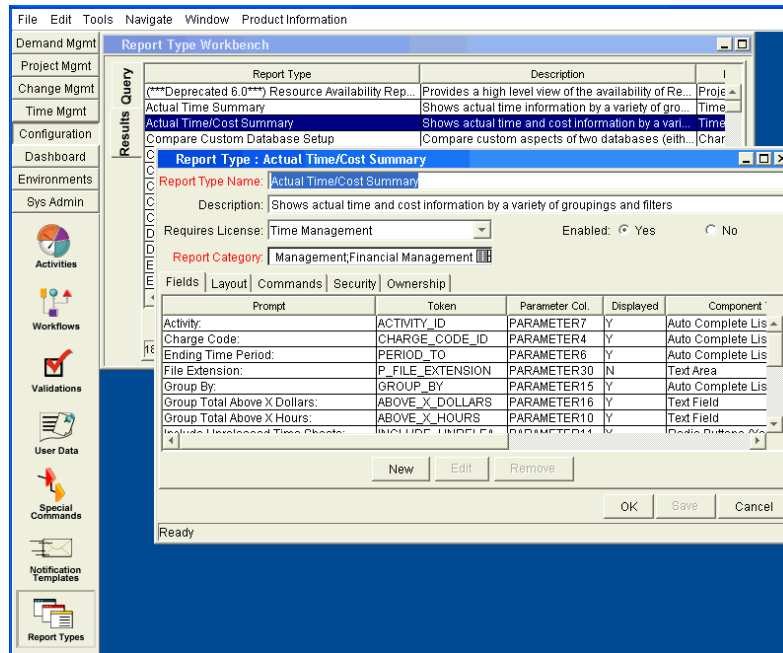
Figure 2-49. Report Types Workbench

See Also

Filter Criteria, *Notifications*, *Server (Mercury IT Governance)*

For More Information

Table 2-115. Reports: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management Extension for Oracle E-Business Suite Guide	Reports related to Mercury Change Management Extension for Oracle E-Business Suite
Mercury Change Management Extension for PeopleSoft Enterprise Guide	Reports related to Mercury Change Management Extension for PeopleSoft Enterprise
Mercury Change Management Extension for SAP® Solutions Guide	Reports related to Mercury Change Management Extension for SAP® Solutions

Table 2-115. Reports: Getting more information [continued]

Information Source	Sample Related Topics or Tasks
Mercury Change Management Extension for Siebel eBusiness Applications Guide	Reports related to Mercury Change Management Extension for Siebel eBusiness Applications
Open Interface Guide and Reference	Configuring third-party reporting tools
Reports Guide and Reference	• Running reports • Searching for reports • Configuring reports • Configuring third-party reporting tools • List and descriptions of all user-level reports
System Administration Guide and Reference	Getting system information from server reports
What's New in Release 6.0	Reports conversions Upgrade impacts: • Report categorization and required license • New Submit Report access grant • New Report Category validation • Changes to report type

Requests (Request Process)

Application(s)

Demand Management

Definition

An operational transaction accomplished by following a predefined business process. Requests are processed by multiple individuals working collaboratively to meet their requirements.

Requests are the fundamental work units of Mercury Demand Management.

Usage

- Each Mercury IT Governance Center request has an associated request type that determines which fields are included in the request page.

- Once the basic information for a new request has been entered, the appropriate workflow is automatically selected based on information in the request type.

- As a request goes though its steps, users are prompted for the information required to bring the request to closure.

- The request header type, request type, and request workflow are the main configuration entities that make up a request process implementation.

- A request header type and request type collectively define the form used for gathering and storing data throughout the process.

- A request workflow models the flow of the resolution process.

- The security layer within and around a request process defines which individuals can participate in the process and what actions are expected of them.

- System executions and application routines can be automated in request processes using request type commands, for example:

    - Generating application or system user accounts

    - Executing a database script

    - Running a third-party application report

Example(s)

Requests can be useful in application enhancement, new employee provisioning, project proposal or scope change, resource allocation, and portfolio asset assessment.

Subtopic(s)

Request Header Types. Definition of a collection of fields appearing in the header section of requests using a given request type.

The presentation and validation of the fields depends on the request type.

Additional information:

- The main components of a request header type configuration are data fields, field organization and layout, and configuration ownership.

- Standard request header fields include Request Number, Description, Created By, Priority, and Contact Name.

- In addition to the standard field set, a request header can also include custom fields you want to use across several request processes.

- For indexing and querying purposes, each request type must include a request header type.

- A request header type is configured separately from the request types with which it will be used.

- The main components of a request header type configuration are data fields, field organization and layout, and configuration ownership.

- A request type contains business rules that are specific to the process it supports.

Request Types. A general category defining the structure of a request. Determines the logic behind the storage and manipulation of data within a request.

Mercury Demand Management includes predefined request types—for example, bug request type and enhancement request type. Request types also specify particular workflows through which requests of a given type are routed.

Request Type Commands. A single module created to perform a specific function within a request type.

Additional information:

- Each request type can contain multiple blocks of commands, each created as an individual module.

- Command steps can include UNIX commands, calls to a third-party application with a command-line interface, or Mercury IT Governance Center special commands.

● For example, to automate the creation of an application user account, a request type can have one command module for auto-generating a unique user name and another module for running a shell script that generates the account.

Request Type Rules. A dynamic data defaulting rule that you can configure to automate entries in request fields. There are two types of request type rules:

● **Simple defaults rules:**

■ Allows you to define data entry automation on specific request header fields.

■ Assigns a specific workflow to each request that is created using the specific request type

■ Can also assign a workflow to each request based on the values from its department and/or application fields

● **Advanced defaults rules:**

Automates data entry on multiple fields using another set of fields as the qualifying triggers.

Request type rules allow you to define dependencies between fields, and use these dependencies to assign them dynamic default values. Each request type can contain as many rules as necessary.

Request Status. A summary indicator (visible in the Header section of a request's detail page) of the current state of a request (for example, New, Assigned, or In Progress). Request status information is automatically set as a request moves through its workflow.

A request status also serves as a trigger for automatically changing the behavior of data fields as a request progresses.

Additional information:

● The Request Status field is standard in the request header section of all requests.

● The status message displayed on the Request Status field can be configured to change as the request progresses from one workflow step to the next.

● A status message can conditionally activate attributes of other data fields within a request.

Interface (Standard)

Figure 2-50. Requests: Create New Enhancement page

Interface (Workbench)

Figure 2-51 shows a request type bug in the Request Type Workbench.
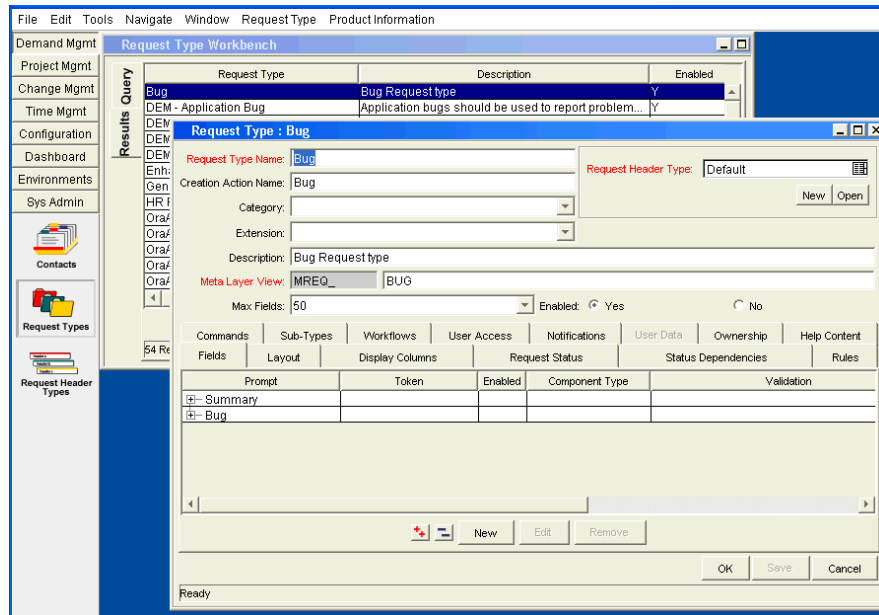
Figure 2-51. Request types: Bug

Figure 2-52 shows Request header type: REFERENCE Help Desk in the Request Header Type Workbench.
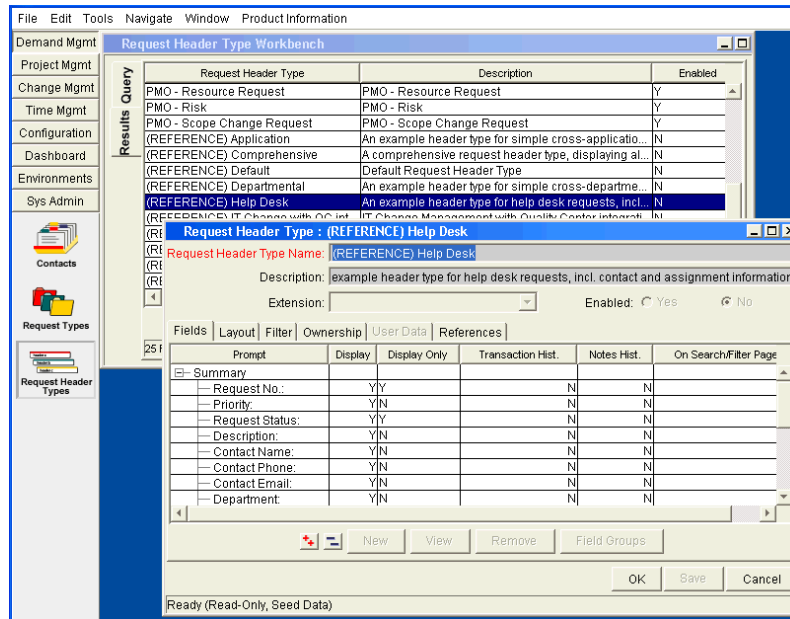
Figure 2-52. Request header types: REFERENCE Help Desk

See Also

Access Grants, *Commands*, *Demand (Demand Management)*, *Security*, *Security Groups*, *Workflows*, *Workflow Step Security*

For More Information

Table 2-116. Requests: Getting more information

Information Source	Sample Related Topics or Tasks
Getting Started	Product description
Mercury Demand Management: Configuring a Request Resolution System	● Creating and configuring requests ● Creating and configuring workflows ● Integrating requests and workflows
Mercury Demand Management User's Guide	● Creating and submitting requests ● Configuring third-party reporting tools
Mercury Program Management Configuration Guide	Creating and submitting requests

Table 2-116. Requests: Getting more information [continued]

Information Source	Sample Related Topics or Tasks
Mercury Project Management Configuration Guide	Integrating requests and project plans
Open Interface Guide and Reference	Request open interface
Security Model Guide and Reference	Request security
What's New in Release 6.0	Request search enhancements

Resources (Resource Management)

Definition

A person or organization (for example, an employee, contractor, consultant, or outsourcing firm) who performs work. Resources are assigned tasks by managers or project planners, and they update their task status in Mercury Project Management.

Key attributes of resources include skill, cost rate, and workload capacity.

Subtopic(s)

Resource Pools. Define groups of resources, organized by skill or resource name, from which staffing profiles can draw for their staffing needs. Resource pools provide information to help project managers to forecast the workload capacity of a group of resources.

Resource Requests. A mechanism by which program managers can request and approve resources, as well as maintain visibility over resource needs and allocations.

Interface (Standard)

Figure 2-53 shows the Modify Resources page.

Figure 2-53. Resources: Modify Resources page

Figure 2-54 shows the Create new Resource Pool page.
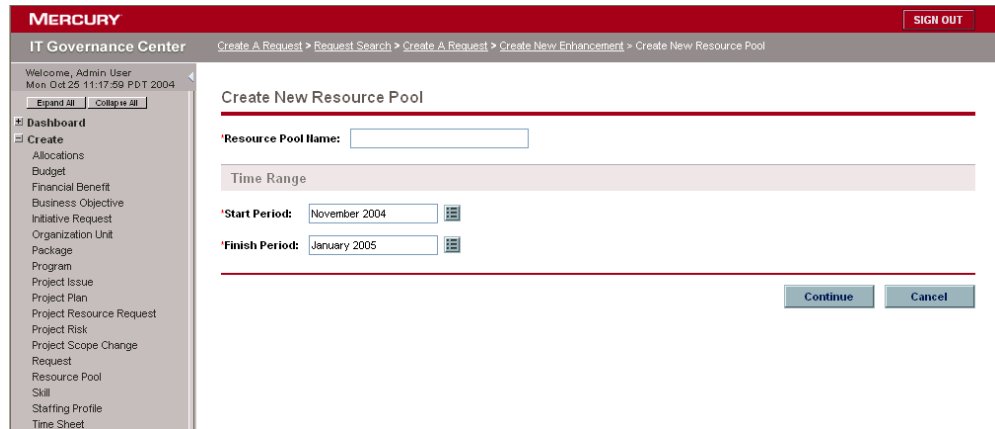
Figure 2-54. Resources: Create New Resource Pool page

See Also

Program (Program Management), *Project (Project Management)*, *Staffing Profiles*

For More Information

Table 2-117. Resources: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Resource Management application description
Mercury Change Management: User's Guide	Assigning resources
Mercury Demand Management User's Guide	Assigning resources
Mercury Portfolio Management User's Guide	Assigning resources
Mercury Program Management User's Guide	Assigning resources
Mercury Project Management Configuration Guide	Assigning resources

Table 2-117. Resources: Getting more information [continued]

Information Source	Sample Related Topics or Tasks
Mercury Resource Management User's Guide	• Creating resources • Working with resource pools and staffing profiles • Viewing resource assignments • Searching for resources
What's New in Release 6.0	Enhanced resource search for assigning resources

Results

Audience

Application developers or configurators

Definition

The outputs of workflow steps.

Usage

A single step can have multiple valid results that manage the workflow. For example, a step labeled Approve Migration could have a result of Approved or Not Approved.

Interface (Workbench)
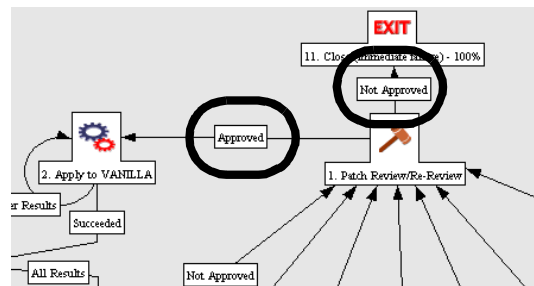
Figure 2-55. Results: Approved/Not Approved

See Also

Workflows

For More Information

Table 2-118. Results: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Demand Management: Configuring a Request Resolution System	Configuring workflows
Configuring IT Demand Tracking and Management	Configuring workflows for IT demand

Risk

Application(s)

- Portfolio Management
- Program Management

Definition

Functionality to record and resolve potential threats to the success of a program or project. Summary condition indicators can be configured to alert users to conditions that indicate increased risk.

Also part of the qualitative scoring key used to evaluate projects, proposals, and assets.

Interface (Standard)

Figure 2-56 shows the Risk Resolution: Average Resolution Time page.
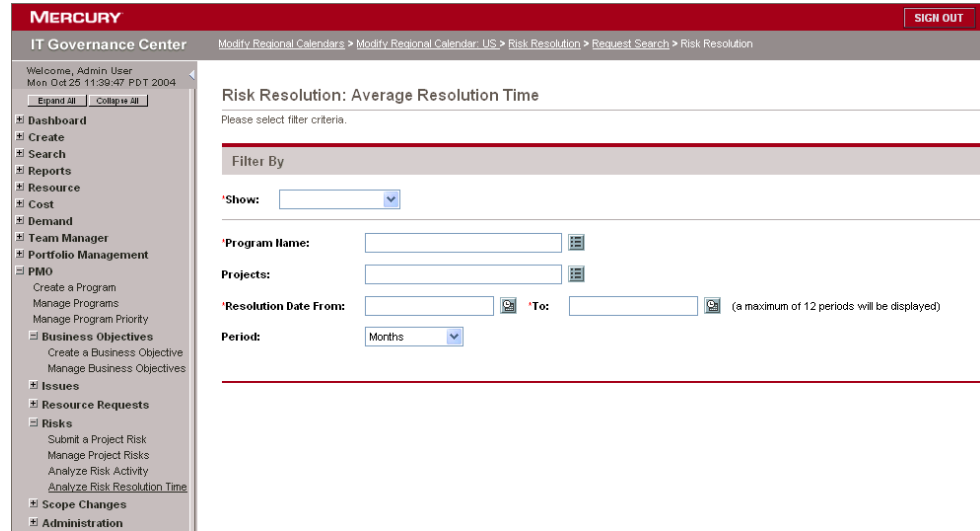
Figure 2-56. Risk Resolution: Average Resolution Time page

Figure 2-57 shows the View Scoring Criteria page.
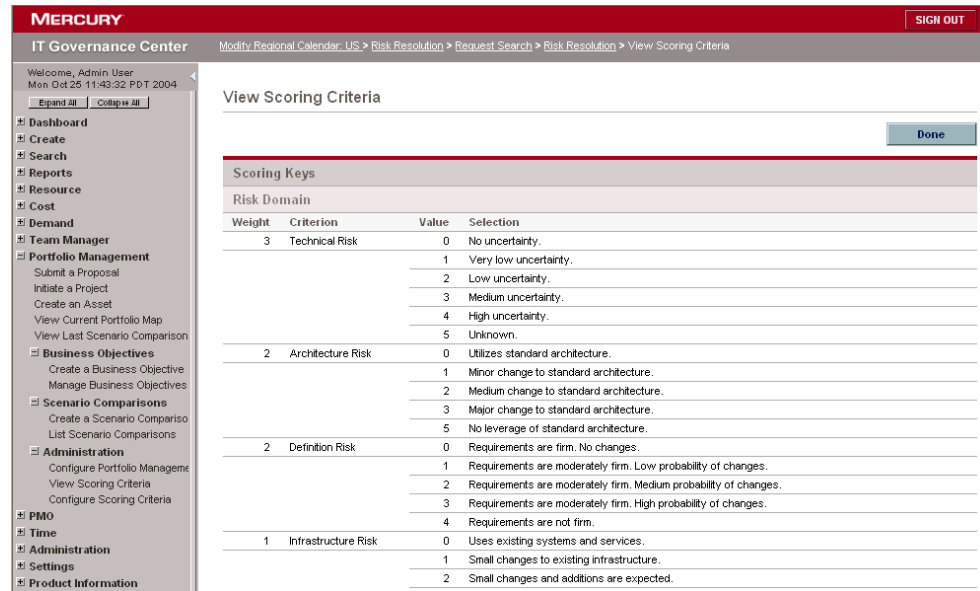
Figure 2-57. Risk: View Scoring Criteria page

See Also

Program (Program Management), *Qualitative Scoring*

For More Information

Table 2-119. Risk: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Configuring risk ratings on the qualitative scoring key
Mercury Portfolio Management User's Guide	Using the qualitative scoring key
Mercury Program Management Configuration Guide	Configuring risk
Mercury Program Management User's Guide	Submitting risks

RMI (Remote Method Invocation)

See *Architecture*

RML (Reporting Meta Layer)

Audience

Database administrators

Definition

One of the two schemas used by the Mercury IT Governance Center database.

The base schema stores all data and is optimized for speed and performance. The RML schema provides views that consolidate the data, and is optimized for data accessibility.

Usage

Any third-party reporting tool that can run SQL queries against an Oracle database can be used to report on data in Mercury IT Governance Center through the RML. This includes specialized reporting applications, as well as desktop applications like Microsoft Excel.

Additional information:

- The RML schema contains views that simplify access to data and provide the following capabilities:

    - Summarization and trend analysis

    - Composite views of IT Governance entities by combining data from separate tables

    - Access to custom configuration data

    - Read access but write restrictions to the data in the base schema

- The RML schema is created when you install Mercury IT Governance Center.

- Transactional entities like request types and object types are each provided their own view in the RML schema.

- RML views display the latest transactional data in Mercury IT Governance Center. However, the definition of the views themselves may need to be updated whenever configurations are modified or when new configurations are created.

For More Information

Table 2-120. RML: Getting more information

Information Source	Sample Related Topics or Tasks
Reports Guide and Reference	Reporting meta layer

ROI (Return on Investment)

Application(s)

Portfolio Management

Definition

A financial metric that compares expected benefit against actual cost for a portfolio management entity.

Usage

ROI appears in all Mercury Portfolio Management entities, and can be used in Portfolio Management visualizations and analyses.

If neither ROI nor NPV is a satisfactory financial metric to use in gauging portfolio success, Mercury IT Governance Center customers can define and configure a custom metric.

See Also

Finance (Financial Management), *NPV (Net Present Value)*, *Portfolio (Portfolio Management)*

For More Information

Table 2-121. ROI: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management Configuration Guide	Setting ROI
Mercury Portfolio Management User's Guide	Using ROI

Role-Based Security Groups

See *Security Groups*

Run Groups

Application(s)

Change Management

Definition

Groups of packages that are scheduled to process together.

Usage

- Run groups are automatically determined when release distributions are created, based on package dependencies specified in the release.

- Run groups provide an efficient way to process packages that can be run in parallel without having to wait for non-related dependencies.

See Also

Packages (Package Process)

For More Information

Table 2-122. Run groups: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Releases, dependencies, and run groups

Sarbanes-Oxley Act of 2002

Definition

Legislation covering the following areas of business responsibility:

- Reporting (upgrading disclosures)
- Roles (strengthening corporate governance)
- Conduct (expanding user accountability)
- Enforcement (increasing oversight)
- Penalties (broadening sanctions)
- Relationships (Heightening auditor independence)

Implementation is governed by a public company accounting oversight board charged with improving the accuracy and reliability of corporate disclosures.

Usage

The functionality in Mercury IT Governance Center helps organizations meet the responsibilities mandated by Sarbanes-Oxley.

Scheduling Engine

See *Architecture*

Scope Change Requests

Application(s)

Program Management

Definition

Mechanisms to control the expansion of programs and projects. Scope change requests are assessed and either added to a program or project, or rejected.

Interface (Standard)

Figure 2-58. Scope Change Activity page

See Also

Change Management (Mercury Change Management), *Program (Program Management)*, *Project (Project Management)*, *Requests (Request Process)*

For More Information

Table 2-123. Scope change requests: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Program Management Configuration Guide	Configuring scope deltas
Mercury Program Management User's Guide	Filing scope deltas

Screens

See *Interface (Workbench)*

Screen Groups

See *Interface (Workbench)*

SDK (Software Development Kit)

Audience

- Application developers or configurators

- System or instance administrators

Definition

A programming package that enables a programmer to develop applications for a particular platform.

Usage

The SDK must be installed on the machine where Mercury IT Governance Center is hosted. The JVM (Java Virtual Machine) compiler included in the SDK must be available from the same path in the environment where Mercury IT Governance Center is hosted.

Mercury IT Governance Center requires the full SDK—it cannot be run with a JRE (Java Runtime Environment) only.

See Also

JVM (Java Virtual Machine), *System Requirements*

For More Information

Table 2-124. SDK: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	- Installing Mercury IT Governance Center - Upgrading Mercury IT Governance Center
System Requirements and Compatibility Matrix	Required SDK for all supported platforms

Security

Audience

- Application administrators
- Application developers or configurators
- System or instance administrators
- Database administrators

Definition

Access control to information or business processes.

Usage

Security features in Mercury IT Governance Center:

- Limit who can access certain screens
- Limit who can view or edit certain fields
- Limit the data displayed in sensitive fields or screens
- Limit which users can view, create, edit, or process Mercury IT Governance Center entities like requests, packages, or projects
- Limit which users can view, create, or edit configuration entities like workflows request types, and object types
- Limit which users can alter the security settings

Types

There are four types of security in Mercury IT Governance Center:

- **Product screen security (product licensing)**

  - Provides access to screens or windows in Mercury IT Governance Center products and to functionality on those screens or windows.

  - This kind of security is set in the **Access Grant** tab of the Security Group window.

  - Example: Security that allows User A to create a new workflow.

- **Configuration security**

  - Determines who has access to custom configurations in Mercury IT Governance products.

  - Access includes ownership and user access.

  - This kind of security is set in the custom configurations.

  - Example One: Users A and B can create new request types. User A can change the definition of Finance's request types, but user B cannot. Security settings required: Product screen and ownership.

  - Example Two: Users A and B can create new software requests, but cannot see the software requests the other created. Security settings required: Product screen and user access.

- **Workflow step security**

  - Determines who has permission to execute or choose a result for a workflow step.

  - Set in each step of the workflow by specifying the security groups authorized for each step and notification.

  - Can be configured to be determined at runtime based on information entered in the request or package

  - Example One: User A can approve enhancement requests. Once requests are approved, user B can work on developing them. Security settings required: Product screen and user access.

  - Example Two: User A reviews software requests for technical standards created by users B and C. User A cannot see the costs of the software. Security settings required: Product screen, workflow step, and field.

● **Field security**

  ■ Determines who can view and enter information in custom fields added to Mercury IT Governance Center products

  ■ Provides an additional level of protection for sensitive information

  ■ By default, custom fields can be seen by all users who can see the request or project

  ■ Supported by request types and project templates

  ■ Set in the request type and project template

  ■ Example: User A reviews software requests for technical standards created by users B and C. User A cannot see the costs of the software. Security settings required: Product screen, workflow step, and field.

Interface (Workbench)
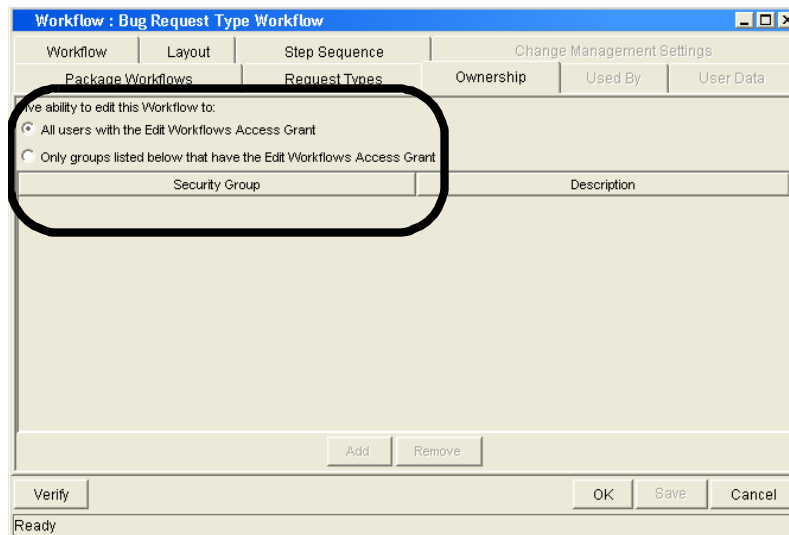
Figure 2-59. Security: Configuring security

See Also

Access Grants, *Authentication*, *Licenses*, *Security Groups*

For More Information

Table 2-125. Security: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Gathering process requirements
Mercury Demand Management: Configuring a Request Resolution System	Setting field and request type security
Mercury Program Management User's Guide	Creating programs
Security Model Guide and Reference	Configuring security
What's New in Release 6.0	• Enhanced portfolio security • Upgrade impacts: Access grants assigned to security groups; resource and organization model changes

Security Groups

Audience

- Application administrators

- Application developers or configurators

- System or instance administrators

- Database administrators

Definition

User classifications based on the common permissions they need and the process roles they perform.

Types

There are two types of security groups:

- **Access grant-based security groups:**

    - Categorize users according to their common access to product screens

    - Link access grants

    - Are used for product screen security only

    - Are usually identified and configured when Mercury IT Governance Center is first implemented

    Each user should belong to at least one access grant-based security group.

- **Role-based security groups:**

    - Categorize users according to common roles in business processes

    - Do not link access grants

    - Are used for configuration security, workflow step security, and field security

    - Are identified and configured whenever new business processes are implemented

    Every user should belong to at least one role-based security group.

Interface (Workbench)
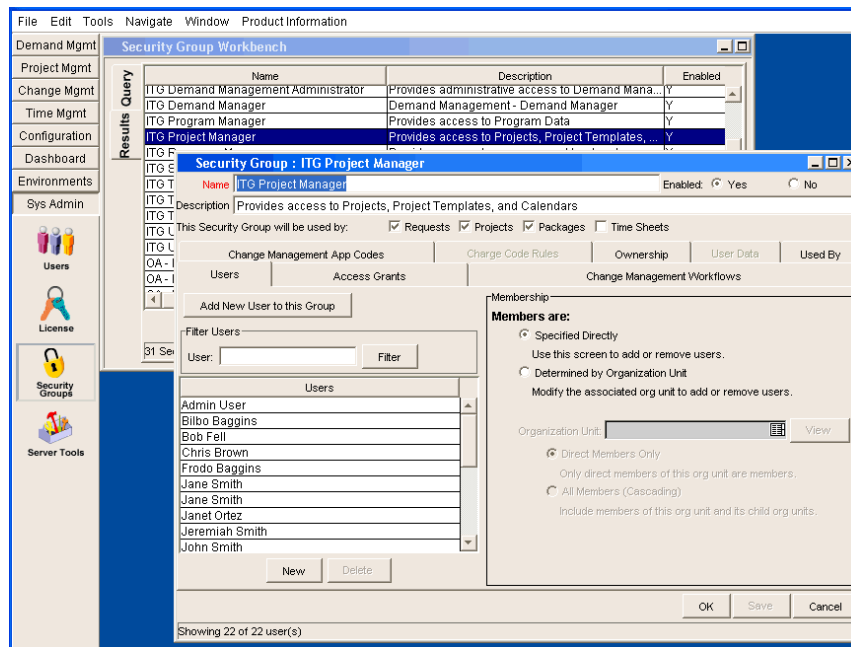
Figure 2-60. Security Group entity in the Security Group Workbench

Usage

Security groups are constructed to provide a set of users with specific access to product screens and functions. Each security group is configured with a set of access grants that enable specific access. Users are then associated with one or more security groups.

Users' security group membership determines which screens they can view or edit, which workflow they can use, and which workflow steps they can act on. Users can be members of multiple security groups at the same time. The collection of security groups they belong to determines their role and access within Mercury IT Governance Center products.

Additional information:

- Users need to be associated to security groups to grant them the product screen, configuration, workflow step, and field permissions they need.

- A given user can be a member of one or more security groups.

- A user receives the cumulative permissions granted by membership in each security group.

● Security groups can be linked to organization units—membership can be updated through the organization units.

See Also

Access Grants, *Security*, *Workflows*

For More Information

Table 2-126. Security groups: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Resource Management User's Guide	Linking security groups to organization units
Security Model Guide and Reference	Users and security groups

Seeded Entities

See *Entities*

Server (Mercury IT Governance)

Audience

● System or instance administrators

● Database administrators

Definition

A Java-based application server or cluster of servers that drives automated tasks within Mercury IT Governance Center.

Usage

Mercury IT Governance Server:

- Has been optimized to run on multiprocessor systems

- Caches configuration data to minimize database calls

- Communicates with the database using JDBC

- Maintains a database connection pool that caches connections to the database

Subtopic(s)

Server Clustering. In a Server cluster configuration only one server runs Mercury IT Governance Center services (for example, email notifications) at any given time. This server is called the primary server. Other servers running at the same time are called secondary servers.

Servers in a server cluster configuration communicate using IP Multicast.

Every Mercury IT Governance Server instance is defined in a common `server.conf` file. Common settings created for the primary server are inherited by the secondary servers. Special settings specified for secondary servers overwrite the common settings.

Mercury IT Governance Servers operating in a clustered configuration supports static load balancing, which associates a given client during a given session with one and only one server. For example, if Client A is associated with Server A at logon, then all requests from Client A during the current session are sent to Server A.

Server Configuration Utility (or Wizard). A utility that walks you through the configuration of the Mercury IT Governance Server parameters, using both Mercury-supplied parameters and custom parameters you can define for nonstandard configurations. You can access these custom parameters as tokens.

Mercury provides two versions of this utility, both of which are located in the `ITG_Home`/bin directory.

- `kConfig.sh` is the GUI-based utility

- `kConfig.sh console` is the console-based utility

Server Tools. Tools available in the Server Tools window:

- **Admin Tools**

  Allows you to run various reports against the Mercury IT Governance Server. Commonly used reports include:

  - Server logon report

  - Server status report

  - Client alive report

  - Server configuration report

  - Server thread report

- **SQL Runner**

  Allows you to:

  - Run database queries (select statements only) from the Mercury IT Governance Workbench interface instead of using an external program like SQL*Plus. You can perform queries on tables or views without having to directly log on to the database schema, and you can run performance tests without being exposed to sensitive data in the database.

    Query results are returned in read-only format; however, you can use the **Open As Text** button to display data in a text window where you can copy and paste the text to other applications or files.

  - Get information about each query execution:

    - Server round-trip

    - SQL execution time

    - ResultSet extraction

    - Total time

  - Test the performance of the system by pinging the Mercury IT Governance Server and Oracle database

See Also

Architecture, *Clients (Machines)*, *Configuration (Application Configuration)*, *Encryption*, *Environments*, *Environment Group*, *Failover*, *File System*, *Installation*, *LDAP (Lightweight Directory Access Protocol)*, *Load Balancing (Resource Management)*, *Parameters*, *Patches*, *Security*, *Single Sign-On Software*, *Web Servers*

For More Information

Table 2-127. Server: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installing the server • Upgrading the server • Maintaining the server

Servers (Web)

See *Web Servers*

Single Sign-On Software

Audience

System or instance administrators

Definition

Authentication software plugged into a Web server that allows users to authenticate on a server once and then connect to other Web servers without having to authenticate again.

For More Information

Table 2-128. Single sign-on software: Getting more information

Information Source	Sample Related Topics or Tasks
System Requirements and Compatibility Matrix	External authentication

Skill

Application(s)

Resource Management

Definition

An ability or area of knowledge tracked by Mercury Resource Management.

Subtopic(s)

Skill Rate. Amount charged for a particular skill.

Usage

Skills are associated with resources. A single resource can have multiple skills of various proficiency levels. Once multiple skills have been assigned to a given resource, a primary skill must be designated. When a resource is assigned (or *booked*) for a task or request, his or her primary skill is associated with the booking by default.

Interface (Standard)
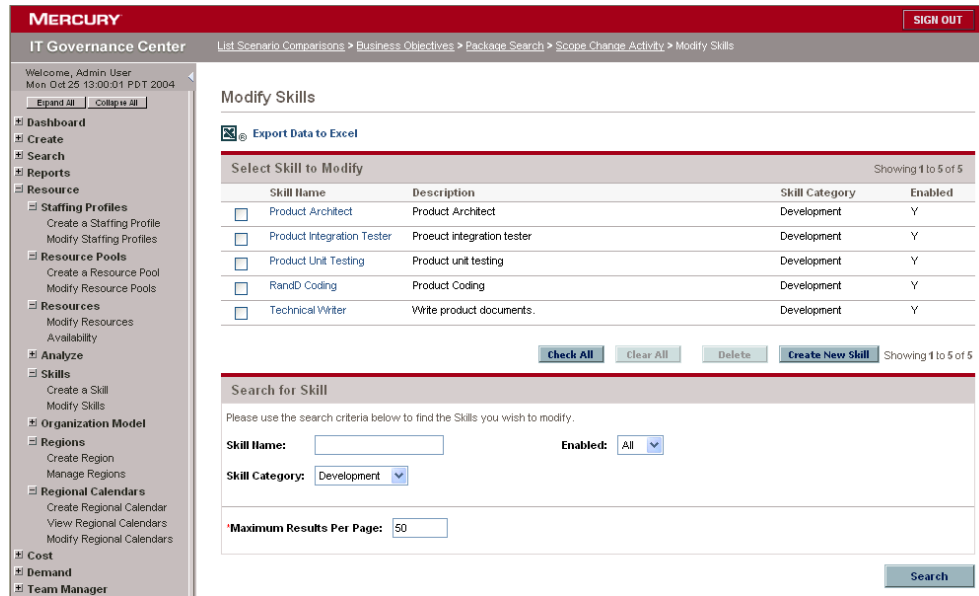
Figure 2-61. Skill: Modify Skills page

See Also

Finance (Financial Management), *Project (Project Management)*, *Resources (Resource Management)*

For More Information

Table 2-129. Skill: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Financial Management User's Guide	Rolling up budgets from project plans
Mercury Project Management User's Guide	Assigning skills or users to project plans
Mercury Resource Management User's Guide	Setting skill rates

SLAs (Service Level Agreements)

Application(s)

Demand Management

Definition

Agreements defining an acceptable level of system performance or reaction time.

Usage

Mercury Demand Management tracks and reports on a predefined set of service level agreements. These SLAs correspond to an acceptable level of performance or reaction time for items being managed using Mercury Demand Management. SLAs are defined on request types.

See Also

Demand (Demand Management), *Requests (Request Process)*

For More Information

Table 2-130. SLAs: Getting more information

Information Source	Sample Related Topics or Tasks
Configuring IT Demand Tracking and Management	Configuring SLAs for IT demand

Software Deployment

Application(s)

Change Management

Definition

The transfer of files associated with a software project to the location where they will be executed.

Usage

Objects in a package are automatically deployed by the Mercury Change Management Java execution engine.

For example, the execution engine logs on to a development environment with a user name and encrypted password, checks out a C program from the version control repository, and transfers the file to a QA environment. The execution engine then executes the C compiler to compile and link the program.

The built-in execution engine scheduler allows customers to schedule deployments at a time that meets their business needs.

See Also

Packages (Package Process), *Package Lines*

For More Information

Table 2-131. Software deployment: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	• Gathering process requirements • Rolling out your deployment process

SOP 98-1 (Statement of Position)

Application(s)

Financial Management

Definition

SOP 98-1 Accounting for the Costs of Computer Software Developed or Obtained for Internal Use was issued in 1998. SOP 98-1 establishes guidance on accounting for the costs incurred related to internal software development and use. The objective is to address the accounting of costs related to designing, developing, obtaining, modifying, or implementing software for internal use.

SOP 98-1 requires that companies capitalize qualifying costs incurred during the application development stage. All other costs in connection with an internal use software project are to be expensed as incurred.

Usage

Mercury IT Governance Center is SOP 98-1 compliant. This means that customers using Mercury IT Governance Center are using an accurate, dependable, and auditable project management and cost tracking system that allows the costs to be tracked, allocated, and reported properly under SOP 98-1 regulations.

See Also

Sarbanes-Oxley Act of 2002

For More Information

Table 2-132. SOP 98-1: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Financial Management User's Guide	• Tracking capitalized costs • Viewing capital exposure
What's New in Release 6.0	SOP 98-1 monitoring and enforcement

Special Commands

See *Commands* and *Command Builder*

SQL*Net

Audience

System or instance administrators

Definition

Oracle's client/server middleware product that offers transparent connection functionality from client tools to the database.

Usage

The computer hosting the Mercury IT Governance Server must have SQL*Net installed to communicate with the Mercury IT Governance Center database schema.

See Also

Architecture, *Server (Mercury IT Governance)*, *System Requirements*

For More Information

*Table 2-133. SQL*Net: Getting more information*

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center
System Requirements and Compatibility Matrix	SQL*Net requirements

SSL Accelerators

Audience

System administrators

Definition

Hardware cards that encrypt and decrypt SSL packets. SSL accelerators can improve the overall performance of HTTPS traffic.

See Also

Web Servers

For More Information

Table 2-134. SSL Accelerators: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	Configuring the system

Staffing Profiles

Application(s)

- Portfolio Management

- Resource Management

Definition

Specify the the allocation of skills and resources between the start and finish dates of projects. The level of resourcing within a given fiscal month is expressed as the number of FTEs (full-time equivalents) or the equivalent number of full-time resources.

Interface (Workbench)
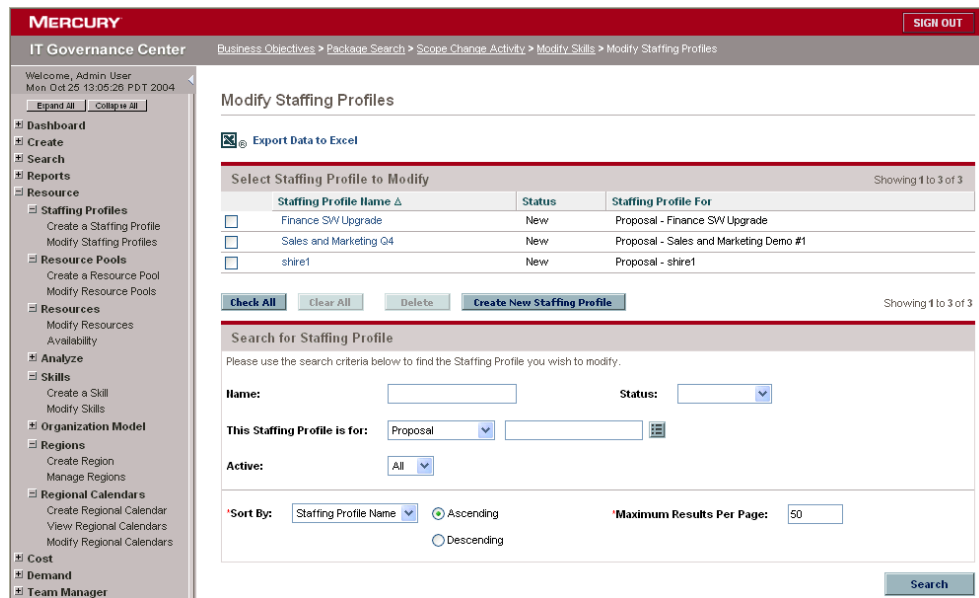
Figure 2-62. Staffing Profile: Modify Staffing Profiles page

See Also

Budgets, *Portfolio (Portfolio Management)*, *Project (Project Management)*, *Resources (Resource Management)*

For More Information

Table 2-135. Staffing profiles: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management User's Guide	Linking staffing profiles to projects
Mercury Resource Management User's Guide	Working with staffing profiles

Status Dependencies

Application(s)

Demand Management

Definition

Rules that define how data fields behave as requests change status during implementation of a process.

Usage

- Request statuses are used to define dependencies.

- If a data field must be made required or updateable at the time of filling out the request, define a status dependency rule on the initial status.

Interface (Workbench)
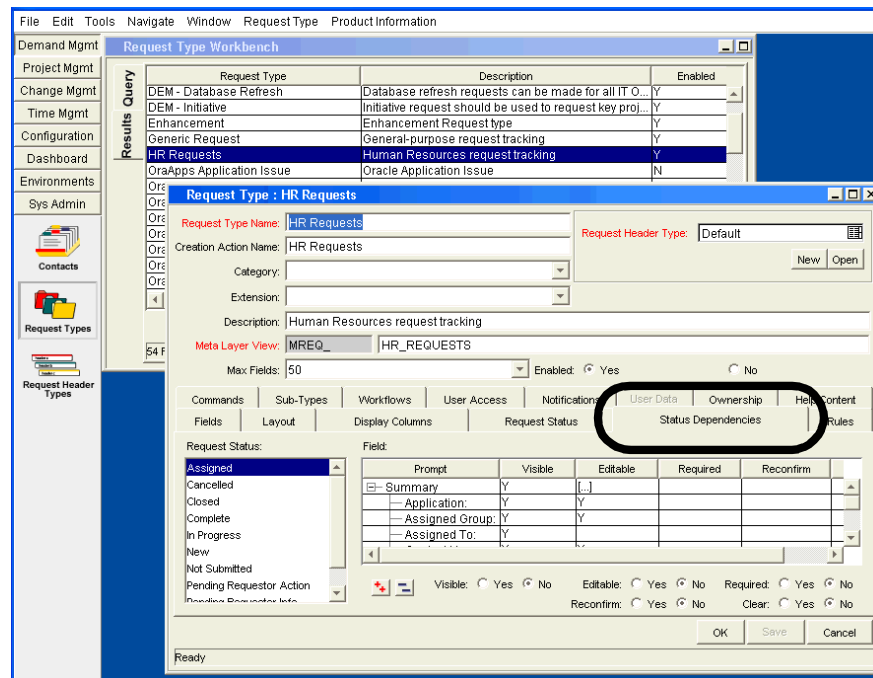
Figure 2-63. Status Dependencies: Request Type

See Also

Requests (Request Process)

For More Information

Table 2-136. Status dependencies: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Demand Management: Configuring a Request Resolution System	Setting status dependencies for request fields

Steps

See *Workflows*

Step Sources

See *Workflows*

Submenus

See *Interface (Standard)*

Subprojects

See *Project (Project Management)*

Subworkflows

Audience

- Application administrators
- Application developers or configurators

Definition

Workflows that are referenced from within other workflows.

Subworkflows are process units containing a series of steps that perform a functional subcomponent of a workflow. Subworkflows allow you to model complex business processes into logical, manageable, and reusable subprocesses.

Usage

From within its parent workflow, each subworkflow is represented as a single workflow step.

Subworkflows are listed in both the Workflow Step Sources window and the Workflow Workbench window.

Additional information:

- Subworkflows cannot be used to process a request or package as a standalone business process.
- A subworkflow can reference other subworkflows, but not itself.
- A subworkflow can be referenced only by workflows or subworkflows of the same workflow scope.
- Permissions specified in the **Security** tab of the calling subworkflow step define who can bypass the steps with the subworkflow.

Interface (Workbench)

Figure 2-64 shows the OraApps Data Capture subworkflow.

Figure 2-64. Subworkflows: OraApps Data Capture

Figure 2-65 shows how to specify a workflow as a subworkflow.
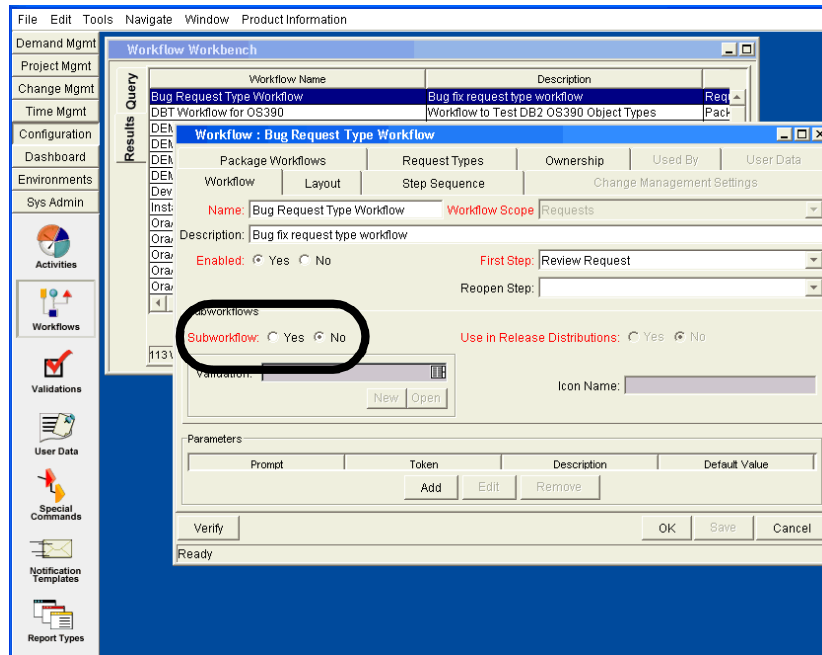
Figure 2-65. Subworkflows: Specifying a Subworkflow

See Also

Environments, *Notifications*, *Transitions*, *Validations*, *Workflows*

For More Information

Table 2-137. Subworkflows: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring workflows
Mercury Demand Management: Configuring a Request Resolution System	Configuring workflows
Mercury Program Management Configuration Guide	Configuring workflows

Summary Conditions

Application(s)

Project Management

Definition

Graphical, color coded (green, yellow, red) indicators of the health of a project.

See Also

Project (Project Management)

For More Information

Table 2-138. Summary conditions: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	Configuring project plan summary condition indicators

System

See *Architecture*.

System Requirements

Audience

- System or instance administrators
- Database administrators

Definition

Prerequisites that you must meet before installing or upgrading Mercury IT Governance Center. Types of requirements include:

- Platform requirements

- Database requirements

- Storage requirements

See Also

Server (Mercury IT Governance)

For More Information

Table 2-139. System requirements: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	- System architecture - System requirements
System Requirements and Compatibility Matrix	- Supported environments for release 6.0 of Mercury IT Governance Center for organizations installing or upgrading to release 6.0 - Information about products that were supported in prior releases of Mercury IT Governance Center but that have been desupported in release 6.0

Table Components

Application(s)

- Demand Management
- Time Management

Definition

Used to enter multiple records into a single field.

Usage

- Each table component field can be configured to include multiple columns of varied data types.
- Table components also provide the functionalities for auto-populating elements within columns and for calculating column totals.

See Also

Table Rules, *Validations*

For More Information

Table 2-140. Table components: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Configuring table components
Mercury Demand Management: Configuring a Request Resolution System	Incorporating table components into request types
Mercury Demand Management User's Guide	Using table components

Table Rules

Audience

- Demand Management

- Time Management

Definition

Dynamic data defaulting rules that can be configured to automate entries in table columns.

Usage

- Table rules allow you to define dependencies between columns and use these dependencies to assign them dynamic default values. Each table component can contain as many defaulting rules as necessary.

- Table rules are applied according to the sequence in which they were declared.

- Each table rule is defined with dependencies, results, and SQL.

- Each rule is activated by a rule event (for example, Apply on Field Change).

See Also

Table Components

For More Information

Table 2-141. Table rules: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Configuring table rules
Mercury Demand Management User's Guide	Using table rules

Tasks

Application(s)

- Project Management

- Time Management
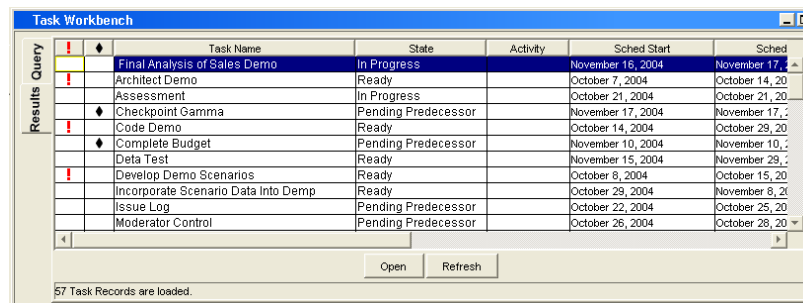
Definition

Work to be done.

Usage

Tasks are typically assigned by project managers. Team members (that is, individual resources) typically update status information for their individual tasks.

Interface (Workbench)

Figure 2-66. Task Workbench

See Also

Project (Project Management), *Requests (Request Process)*, *Work Items*

For More Information

Table 2-142. Tasks: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Project Management User's Guide	Assigning tasks
Mercury Resource Management User's Guide	• Viewing task assignments • Visualizing resource load
Mercury Time Management Configuration Guide	Maintaining activities
Mercury Time Management User's Guide	Using time sheets

Technology

See *Architecture*

Templates

See *Project (Project Management)* or *Notification Templates*

Third-Party Applications

Definition

Products produced by companies other than Mercury that work with Mercury IT Governance Center.

Usage

Mercury IT Governance Center works with a number of third-party applications. Some of these products (for example, the optional document

management functionality in Mercury IT Governance Center) are configured to work directly with the IT Governance Center products. Others (for example, Visual SourceSafe) make use of the Mercury application programming interface (API).

Subtopic(s)

EMC/Documentum. Document management functionality created by EMC/Documentum and available as a special option from Mercury can be configured to work with Mercury IT Governance Center. This functionality allows you to track, index, and search multiple versions of the documents that are critical components to many IT projects and operational activities.

Microsoft Project. A project management application from Microsoft.

Version Control Products. Mercury IT Governance Center can be configured to work with version control products like CCC/Harvest, ClearCase, PVCS, RCS, SCCS, and Visual SourceSafe.

The Mercury Change Management outbound API provides check-in, check-out, and promotion functions during deployment.

File system objects can be deployed to new installations and updated in version control simultaneously. This synchronizes your version control repository, physical installations, and Mercury Change Management workflows.

For More Information

Table 2-143. Third-party applications: Getting more information

Information Source	Sample Related Topics or Tasks
Document Management Guide and Reference	Installing and using the Mercury document management module
Mercury Project Management User's Guide	Setting up Microsoft Project integration
System Administration Guide and Reference	Installing third-party applications
System Requirements and Compatibility Matrix	Third-party products supported by release 6.0 of Mercury IT Governance Center

Time (Time Management)

Definition

Mercury Time Management integrates time and work management. With Mercury Time Management, time reported by staff members is always linked to work items, which can improve data integrity, accuracy, and timeliness.

Interface (Standard)

Figure 2-67. Time Management: Approve Time page

Interface (Workbench)
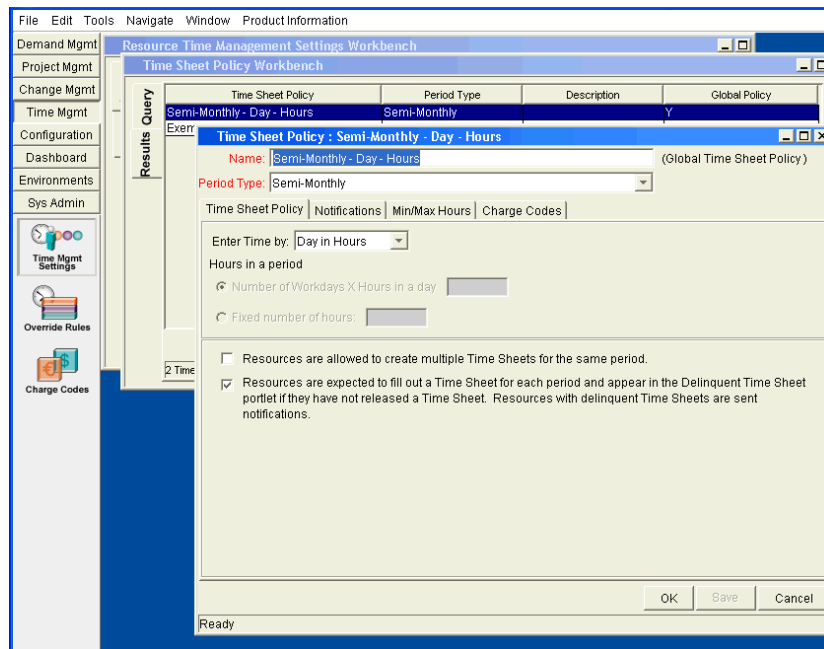
Figure 2-68. Time Sheet Policy Workbench: Time Sheet Policy

See Also

Resources (Resource Management), *Timeouts*, *Time Sheets*

For More Information

Table 2-144. Time Management: Getting more information

Information Source	Sample Related Topics or Tasks
Guide to Documentation	Mercury Time Management application description
Mercury Time Management Configuration Guide	Configuring Time Management

Table 2-144. Time Management: Getting more information [continued]

Information Source	Sample Related Topics or Tasks
Mercury Time Management User's Guide	Using Time Management
What's New in Release 6.0	Time Management enhancements Upgrade impacts: ● Time tracking ● Ties between actuals ● Skill rates ● What-if analysis ● Time sheet policies

Timeouts

Audience

● Application administrators

● Application developers or configurators

Definition

Mechanisms that limit how long workflow steps can remain idle before the process is automatically forced to move forward.

Interface (Workbench)
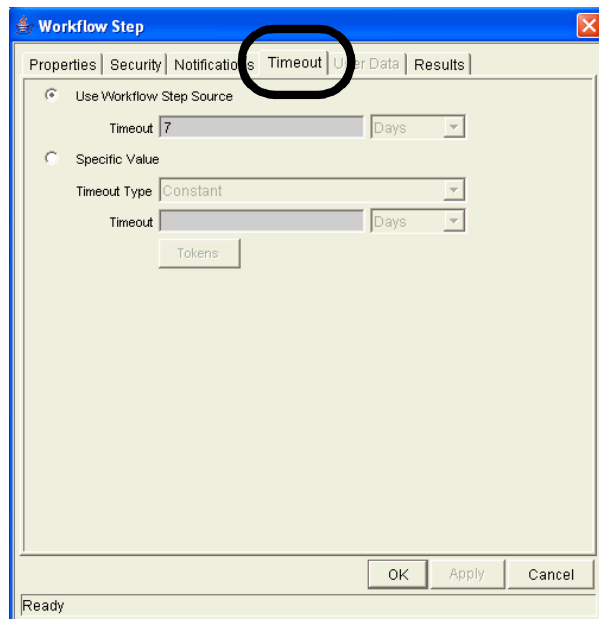
Figure 2-69. Timeouts: Setting on a workflow step

See Also

Transitions, *Workflows*

For More Information

Table 2-145. Timeouts: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring timeouts
Mercury Demand Management: Configuring a Request Resolution System	Configuring timeouts

Time Sheets

Application(s)

Time Management

Definition

Aggregations of the time worked by given resources for specific periods of time on one or more work items.

Resources enter information for their individual time sheets. Managers review and approve time sheets.

Interface (Standard)

Figure 2-70. Time sheets: Enter Time

Interface (Workbench)
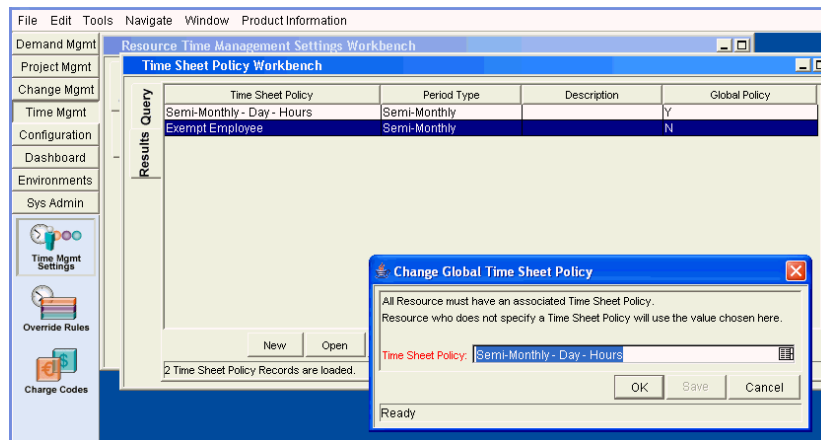
Figure 2-71. Time Sheet Policy Workbench: Change Global Policy

See Also

Resources (Resource Management), *Time (Time Management)*, *Work Items*

For More Information

Table 2-146. Time sheets: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Configuring time sheets
Mercury Time Management User's Guide	Using time sheets

Tokens

Audience

Application developers or configurators

Definition

Variables used to facilitate the creation of general entities that can be applied to a variety of contexts.

Usage

Tokens are used to pass parameters to commands and command-line directives in object type and request type commands.

Standard tokens come with Mercury IT Governance Center products. Custom tokens are generated to represent specific entity configurations like object type fields, request type fields, and workflow parameters.

Fields in the following entities can be referenced as tokens:

- Object types
- Report types
- Request types
- User data
- Workflow parameters

Tokens are similar in concept to workflow parameters, which also capture and store data. In contrast, a workflow parameter captures data returned by workflow steps.

Subtopic(s)

Token Builder. Used to find and generate correct token syntax. Accessible anywhere tokens can be used.

Interface (Workbench)
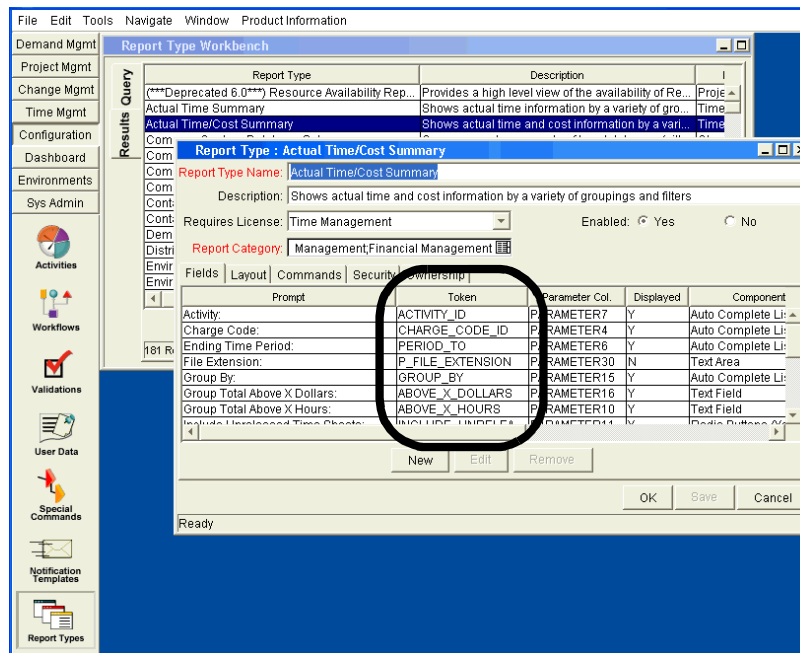
Figure 2-72. Tokens in a Report Type

See Also

Commands, *Validations*

For More Information

Table 2-147. Tokens: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	• Using tokens • List and descriptions of all tokens
Mercury Change Management: Configuring a Deployment System	Transitioning based on tokens
Mercury Demand Management: Configuring a Request Resolution System	Setting tokens for fields

Transitions

Audience

Application developers or configurators

Definition

Definitions of the next action after completion of workflow steps.

Usage

Transition results can be any of the following:

- Single specific result

- Multiple specific results

- Other results

- All results

Because there may be several possible completion results for a single step, multiple outgoing transitions can be defined for each workflow step.

Examples

- The transitions for a step labeled Product Manager Approval could be Approved or Not Approved.

- The transition for a step labeled Analysis and Design (of a software application) could be Completed or Needs More Work.

Interface (Workbench)
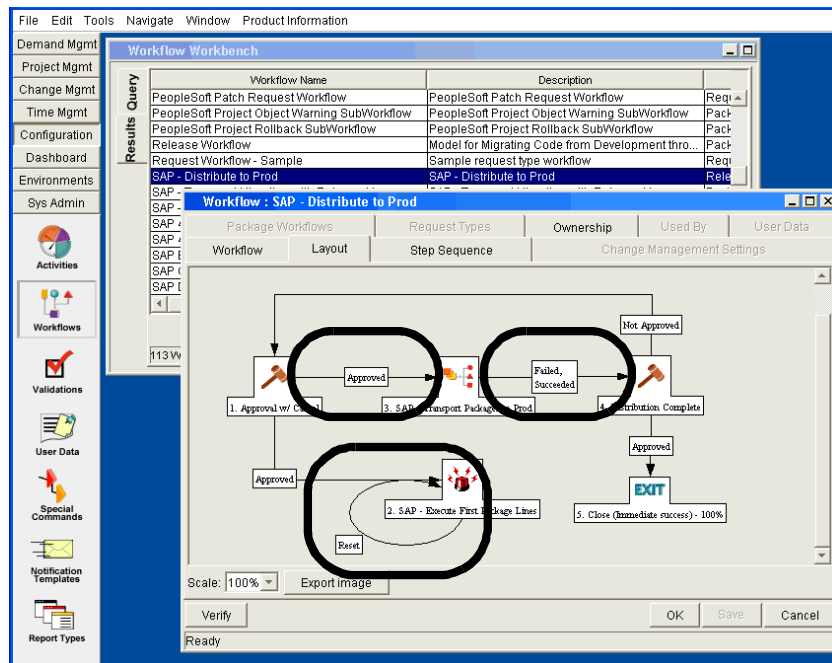
Figure 2-73. Transitions: SAP-related workflow

See Also

Workflows

For More Information

Table 2-148. Transitions: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring workflow components
Mercury Demand Management: Configuring a Request Resolution System	• Configuring transitions • Using transitions

Translation

See *Localization*

Triggers

Application(s)

Demand Management

Definition

An event-driven specialized procedure.

See Also

Requests (Request Process)

For More Information

Table 2-149. Triggers: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Demand Management: Configuring a Request Resolution System	Triggers

UI (User Interface)

See *Interface (Standard)* and *Interface (Workbench)*

Upgrade

Audience

- System or instance administrators

- Database administrators

Definition

The process of installing and configuring a new version of one or more of the Mercury IT Governance Center products.

See Also

Architecture, *Installation*

For More Information

Table 2-150. Upgrade: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury GL Migrator Guide	Upgrading GL Migrator
Mercury Object Migrator Guide	Upgrading Object Migrator
System Administration Guide and Reference	Upgrading Mercury IT Governance Center
What's New in Release 6.0	New location for upgrade information
Documentation for the Mercury Change Management Extensions (as described in the *Guide to Documentation*)	Upgrading the Extensions

Used By

Definition

Information about where a particular validation is used.

Interface (Workbench)
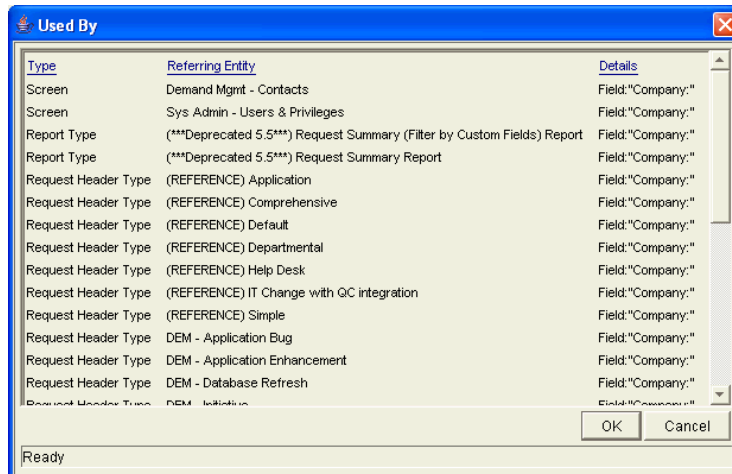
Figure 2-74. Used by information for a validation

See Also

Validations

For More Information

Table 2-151. Used by: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	Viewing validation "used by" information

Users (User Accounts)

Definition

The logon names and passwords for users on the system.

Interface (Workbench)
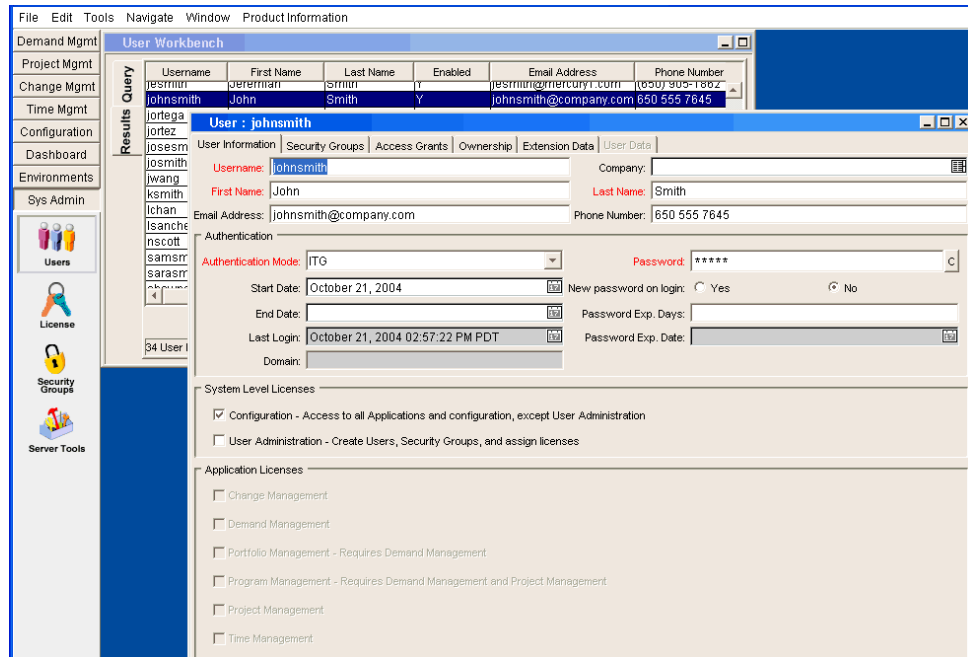
Figure 2-75. User account information for John Smith

See Also

Licenses, *Security*, *Security Groups*, *User Access*

For More Information

Table 2-152. User accounts: Getting more information

Information Source	Sample Related Topics or Tasks
Getting Started	Logging on and off Mercury IT Governance Center
Open Interface Guide and Reference	Generating or updating users from a database or LDAP server
Security Model Guide and Reference	● Creating individual user accounts ● Assigning product licenses to multiple users

User Access

Audience

● Application administrators

● Application developers or configurators

● System or instance administrators

Definition

Methods for restricting user access to information and processes.

Usage

● Configurations that are directly accessed by end users support user access restrictions (for example, request types and package workflows).

● By default, request types and package workflows are available to be used by any user with the appropriate view and edit access grants.

● Set user access to increase security for critical configurations and to simplify the choices available to end users.

See Also

Access Grants, *Packages (Package Process)*, *Requests (Request Process)*, *Users (User Accounts)*, *Workflows*

For More Information

Table 2-153. User access: Getting more information

Information Source	Sample Related Topics or Tasks
Security Model Guide and Reference	• Access grants • Restricting the usage of package workflows • Restricting package viewing to participants

User Data

Audience

- Application administrators

- Application developers or configurators

Definition

Functionality in Mercury IT Governance Center that allows you to add custom fields on screens for which you need to capture more information than is provided using their standard format.

Usage

- You can activate a **User Data** tab on the screen of an entity for which you want to add custom fields. Fields defined as user data are applied across all instances of that entity.

- Entities visible in the User Data Workbench contain Mercury-supplied user data definitions or user data types for all Mercury IT Governance Center entities that support this functionality.

- Supported entities are request type, object type, and report type fields.

- You can view and edit permissions on the following user data types: package, program, project, request, task, and user.

- You can reference user data fields in notifications and command executions by using their tokens.

- The scope of user data types is global or context (package, environment, and validation value user data types only).

Interface (Workbench)
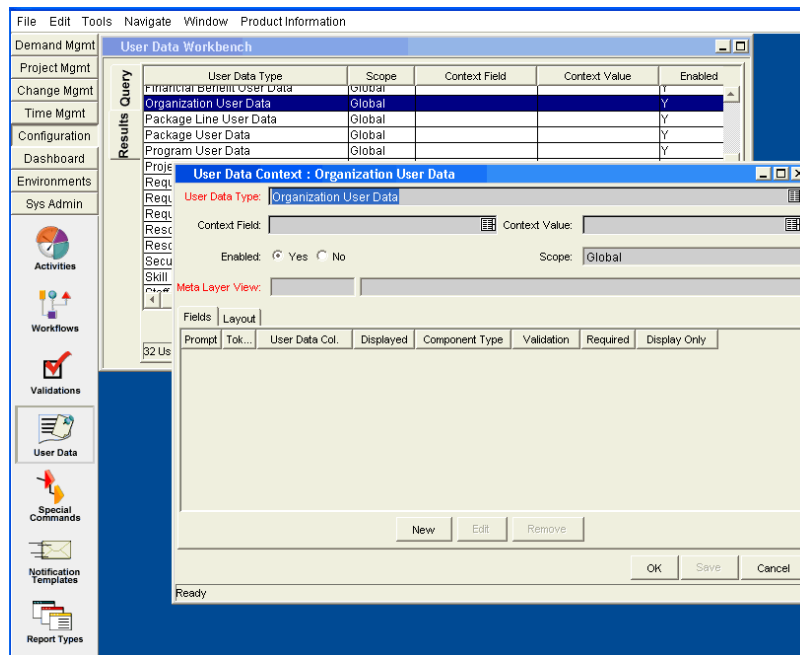
Figure 2-76. User Data Workbench

See Also

Access Grants, *Security*, *Users (User Accounts)*, *User Access*

For More Information

Table 2-154. User data: Getting more information

Information Source	Sample Related Topics or Tasks
Security Model Guide and Reference	• Setting user data field security • Setting user data field dependencies

Validations

Audience

- Application administrators

- Application developers or configurators

Definition

Validations determine the acceptable input values for user-defined custom fields.

(Workflow steps) Define the possible results the step can return.

(Data fields) Define the acceptable values that can be entered in the field.

Usage

Validations maintain data integrity by ensuring that the correct information is entered into a field before it is saved to the database.

For example, validations can be used to ensure that no text information is entered into a numeric field, or that dates are entered into a field in the proper format. More complex validations can be used to verify that only appropriate users are assigned to a task.

The values in selection validations (accessed through drop-down or auto-complete lists) can be configured either by listing the values or by performing an SQL query.

Validations are always used in the following situations:

- Custom fields generated for an object type, report type, request type, or user data

- Decisions and execution workflow steps

- Drop-down lists and auto-complete lists in Mercury Demand Management

Additional information:

- The validation list is the main criterion to consider when choosing which workflow decision step source to use.

- Validations maintain data integrity when processes need to capture data in user input fields.

- Object type, request type, report type, and portlet parameter fields use validations to control the type of data users can enter.

- The Validation Workbench provides a central point from which you can manage all the validations used across Mercury IT Governance Center. You can also create a validation directly from the entity where you need the validation.

- A validation's component type defines the mode that an input field uses when accepting data entry (for example, the Attachment component type allows users to attach a file from their local drive).

Interface (Workbench)
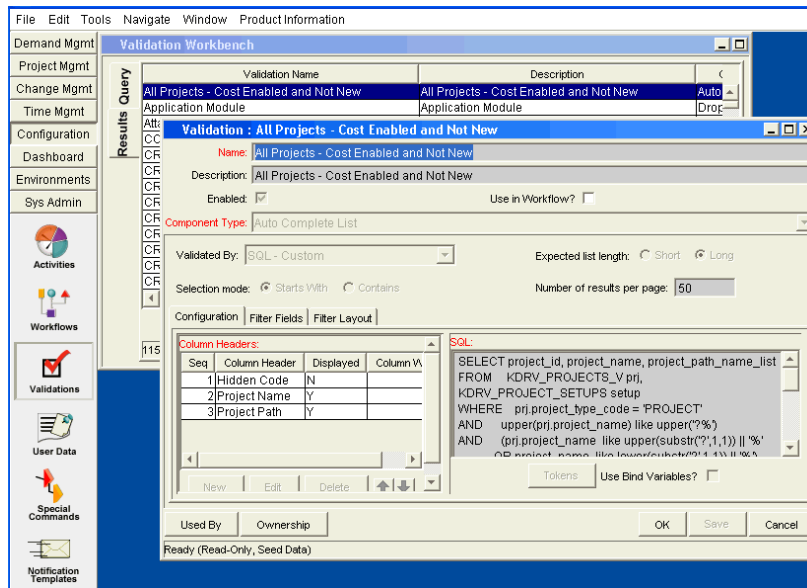
Figure 2-77. Validation Workbench: Validation

See Also

Auto-complete Lists, *Commands*, *Data Masks*, *Drop-down Lists*, *Table Components*, *Tokens*, *Used By Workflows*

For More Information

Table 2-155. Validations: Getting more information

Information Source	Sample Related Topics or Tasks
Commands, Tokens, and Validations Guide and Reference	• Creating custom data masks • Generating lists using queries • Viewing validation references
Mercury Change Management: Configuring a Deployment System	Configuring workflow components
Mercury Demand Management: Configuring a Request Resolution System	• Setting field validations • Setting workflow step validations
Mercury Time Management Configuration Guide	Maintaining Time Management validations

Web Browsers

Definition

The Mercury IT Governance Center client (standard or Workbench interface) runs on Microsoft Internet Explorer.

See Also

Architecture, *Interface (Standard)*, *Server (Mercury IT Governance)*, *Web Servers*

For More Information

Table 2-156. Web browsers: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center
System Requirements and Compatibility Matrix	Supported external Web browsers

Web Listeners

Audience

System or instance administration

Definition

Web servers that listen for HTTP or HTTPS connections.

See Also

Single Sign-On Software

For More Information

Table 2-157. Web listeners: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• System architecture • Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center
System Requirements and Compatibility Matrix	External authentication

Web Servers

Audience

System or instance administrators

Definition

Software that delivers Web pages.

Usage

The Mercury IT Governance Server comes with an embedded Web server. Integration with an external Web server is required:

- To use your organization's standard Web server for Mercury IT Governance Center

- To implement Server clustering

- To integrate with single sign-on software

- To use SSL accelerators

See Also

Architecture, *Server (Mercury IT Governance)*, *Single Sign-On Software*, *System Requirements*

For More Information

Table 2-158. Web servers: Getting more information

Information Source	Sample Related Topics or Tasks
System Administration Guide and Reference	• Installing Mercury IT Governance Center • Upgrading Mercury IT Governance Center
System Requirements and Compatibility Matrix	External Web servers supported by Mercury IT Governance Center

What-If Analysis

Application(s)

- Financial Management

- Portfolio Management

Definition

A methodology that models various business scenarios to allow comparison among project alternatives. For example, what are the possible results of proceeding with a project during the current year versus waiting until next year?

Usage

Mercury Portfolio Management supports scenario comparisons to analyze the alternatives. Scenario comparisons can be created assembling a set of proposals, projects, and assets.

See Also

Assets, *Finance (Financial Management)*, *Portfolio (Portfolio Management)*, *Project (Project Management)*, *Proposals*

For More Information

Table 2-159. What-if analysis: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Portfolio Management User's Guide	Performing what-if analysis
What's New in Release 6.0	What-if Portfolio Management scenarios

Windows

Definition

Interactive, framed, and floating areas displayed on a bit-mapped computer display.

See Also

Interface (Standard), *Interface (Workbench)*, *Pages*, *Screens*, *Screen Groups*

For More Information

Table 2-160. Windows: Getting more information

Information Source	Sample Related Topics or Tasks
Getting Started	Using the standard interface

Work Allocations

Application(s)

Time Management

Definition

Time periods budgeted to a work item.

Usage

- Work allocations allow managers and planners to assign a specific amount of time to a given task and to allow the affected resources to see the information.

- Work allocations can also be assigned to charge codes, which allows the time worked on a given work item to be charged back.

See Also

Charge Codes, *Tasks*, *Work Items*

For More Information

Table 2-161. Work allocations: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Time Management Configuration Guide	Entering work allocations
Mercury Time Management User's Guide	Entering work allocations

Work Items

Application(s)

Time Management

Definition

Units of work that can be planned, estimated, and tracked to collect actuals as resources complete them. A work item can be:

- Packages
- Projects
- Requests
- Tasks
- Miscellaneous items from the Mercury Time Management validation list (for example, a meeting or vacation)

Usage

Work items have the following kinds of attributes: scheduled and actual start and finish dates, scheduled duration, scheduled effort, and percent complete.

See Also

Project (Project Management), *Requests (Request Process)*, *Resources (Resource Management)*, *Tasks*

For More Information

Table 2-162. Work items: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Resource Management User's Guide	Viewing work item load
Mercury Time Management Configuration Guide	Maintaining resources
Mercury Time Management User's Guide	Work item filters

Workbench

See *Interface (Workbench)*

Workflows

Audience

- Application administrators
- Application developers or configurators

Definition

Business processes represented by logical series of steps that define the path followed by entities in packages, requests, or release distributions.

The basic components of workflows are:

- Steps
- Transitions
- Workflow step security
- Notifications

Workflow steps include transactions (for example, a plan approval) and executions (for example, a script to move an object from a source environment to a destination environment).

Subtopic(s)

Workflow Events. Examples:

- `wf_jump`
- `wf_receive`

Workflow Parameters. Capture and store data returned by workflow steps. The result is used later in a process to direct other stages.

Similar in concept to a token, which also captures and stores data. In contrast, a token captures data that users enter in a field.

You could configure a request workflow to include an SQL statement step that counts how many times a proposal is disapproved.

Workflow Scope. Determines which entities can be processed through a given workflow.

Workflow scope can be one of the following:

- Packages

- Requests

- Release distributions

Workflow Steps. Events that represents one of the tasks that needs to be accomplished to process requests or packages.

There are four types of workflow steps:

- **Decision steps**

  - Decision steps are manual activities performed outside Mercury IT Governance Center. Examples include reviewing a request for approval or evaluating the readiness of a package for migration.

  - Decision step sources tell you the workflow scope in which the step can be used and the validations users can choose from to return a result for that step.

  - Decision steps display always by default. They can also be set to display only when active.

- **Condition steps**

  - Condition steps are used to manage the flow of two or more parallel workflow branches within a single request or package.

  - These are logic steps used for complex workflow processing—for example, allowing a workflow to proceed only after all prerequisite steps are completed.

  - The condition step sources available to request or package workflows and AND and OR.

  - The available condition step sources available to package workflows only are SYNC, FIRST LINE, and LAST LINE.

- **Execution steps**

  - Actions that are automated through Mercury IT Governance Center. An example is the Close step that indicates the end of a process.

  - Every execution step source, including the Close step source has one of two processing types: Manual or Immediate.

  - Mercury IT Governance Center comes with Mercury-supplied execution steps that automate application executions—for example, to create package or request step sources

- **Subworkflow steps**

  - Subworkflows are process units containing a series of steps that perform a functional subcomponent of a workflow. Subworkflows allow you to model complex business processes into logical, more manageable, and reusable subprocesses.

  - From within the parent workflow, each subworkflow is represented as a single workflow step.

Additional information:

- By default, workflow steps are not displayed in requests or packages.

- A workflow step's Display field can be set to Always, Never, or Only When Active.

- A workflow step's validation defines the possible results that the step can return.

Execution step example (token evaluation):

- A package line needs to be routed to different steps based on the object type it is using.

- If the object type is SQL Script, the DBA's approval is given before the package line migrates to production.

- If the object type is File Migration, the package line gets directly routed to the Migrate to Prod step.

Workflow Step Sources. Mercury-supplied workflow steps.

Interface (Workbench)

Figure 2-78 shows a workflow open in the Workflow Workbench.
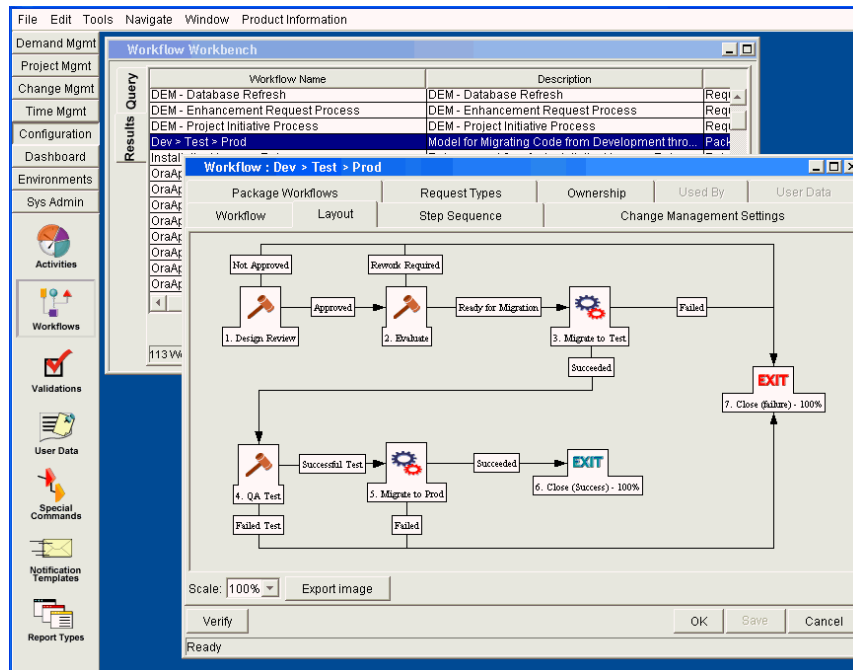
Figure 2-78. Workflow Workbench: Workflow

Figure 2-79 shows the workflow step for the Dev > Test > Prod workflow.

Interface (Workbench)
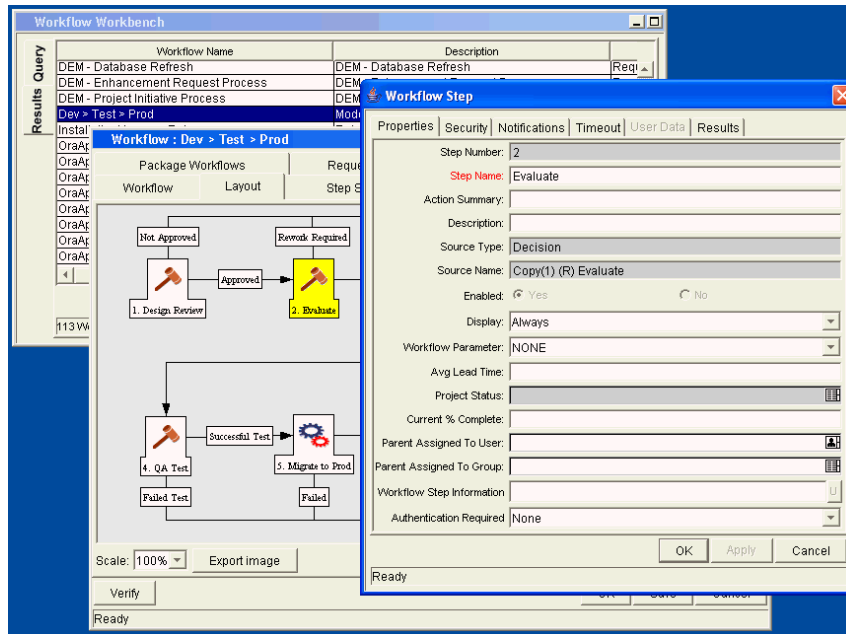
Figure 2-79. Workflow step for Dev > Test > Prod

Figure 2-80 shows the Workflow Step Sources window.
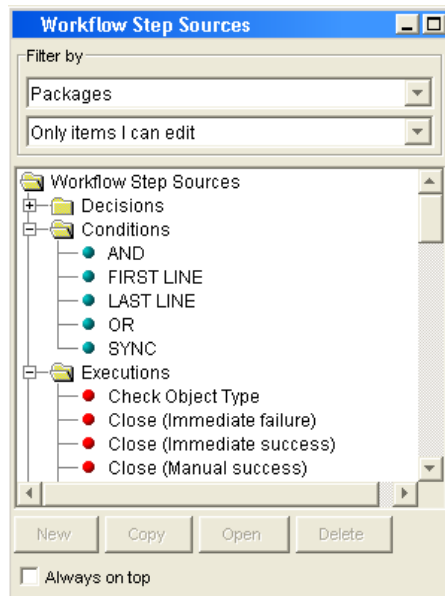
Figure 2-80. Workflow Step Sources window

See Also

Layouts, *Notifications*, *Packages (Package Process)*, *Requests (Request Process)*, *Transitions*

For More Information

Table 2-163. Workflows: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Change Management: Configuring a Deployment System	Configuring workflows
Mercury Demand Management: Configuring a Request Resolution System	● Creating workflows ● Integrating workflows with request types
Mercury Demand Management User's Guide	Selecting workflows
Open Interface Guide and Reference	Workflow open interface

Workflow Engine

See *Architecture*

Workflow Step Security

See *Security*

Work Items

Application(s)

Resource Management

Definition

Tasks that are associated with given projects and are assigned to specific resources.

See Also

Project (Project Management), *Resources (Resource Management)*, *Tasks*

For More Information

Table 2-164. Workload items: Getting more information

Information Source	Sample Related Topics or Tasks
Mercury Resource Management User's Guide	Setting up request work item fields

WSRP (Web Services for Remote Portlets)

Audience

System or instance administrators

Definition

Industry standard defining how to plug remote Web services into the pages of online portals and other user-facing applications.

This standard allows portal or application owners to embed a Web service from a third party into a section of a portal page (that is, a portlet). The portlet then displays interactive content and services that are dynamically updated from the provider's own servers.

WSRP is closely allied with WSIA (Web Services Interactive Applications) and the JSR 168 Java standard for portlets.

Portlets in Mercury IT Governance Center are WSRP compliant.

See Also

Dashboard, *JSR 168 (Java Specification Request)*, *Portlets*

For More Information

Table 2-165. WSRP: Getting more information

Information Source	Sample Related Topics or Tasks
Configuring the Standard Interface	WSRP portlets

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