

OPTIMIZE

MERCURY CHANGE CONTROL MANAGEMENT™

User's Guide

Version 1.1

MERCURY™
BUSINESS TECHNOLOGY OPTIMIZATION

Mercury Change Control Management™

User's Guide

Version 1.1

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Mercury Change Control Management User's Guide, Version 1.1

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Table of Contents

Welcome to This Guide

Welcome to the *Mercury Change Control Management User's Guide*. This guide explains how to work with Mercury Change Control Management to facilitate the Change Advisory Board's change approval process. Using Change Control Management, change managers and the Change Advisory Board can make more informed, and therefore more accurate, decisions regarding the approval of planned changes, thereby minimizing the business risks and costs associated with the change process.

How This Guide Is Organized

This guide contains the following chapters:

Chapter 1 Introduction to Mercury Change Control Management

Describes the various components of the Change Control Management application and provides information on how to access Change Control Management.

Chapter 2 Working with the Dashboard

Describes how to work with the Change Control Management Dashboard, which displays change request data in real time using graphical displays.

Chapter 3 Viewing Data in the Change Impact Tab

Describes how to define filters and view change request details, impact analysis results, user notifications, and change request conflicts in Change Control Management's Change Impact tab.

Chapter 4 Configuring User Settings

Describes how to configure properties for the current Change Control Management user and select the applications you want to associate with this user.

Chapter 5 Administering Mercury Change Control Management

Describes how the Change Control Management administrator can define and edit user properties, associate applications with users, view the users associated with each application, and associate users with specific applications.

Who Should Read This Guide

This guide is intended for the change managers and members of the Change Advisory Board who are responsible for assessing the business impact of change requests on your organization's IT environment and approving or rejecting the proposed changes.

The final chapter of this guide, "Administering Mercury Change Control Management," is written for the administrator of the Change Control Management application.

Change Control Management Documentation

Mercury Change Control Management comes with the following documentation:

Mercury Change Control Management Installation and Configuration Guide explains how to install Change Control Management and configure the various parts of the Change Control Management system. This guide is available in PDF format on the Mercury Change Control Management CD-ROM. It can be read and printed using Adobe Reader, which can be downloaded from the Adobe Web site (<http://www.adobe.com>).

Mercury Change Control Management User's Guide explains how to use the Change Control Management application. This guide is available in PDF format on the Mercury Change Control Management CD-ROM.

Mercury Change Control Management Online Help includes the **Mercury Change Control Management User's Guide**. The Mercury Change Control Management Online Help is accessible from the Change Control Management application by clicking the **Help** tab.

Mercury Change Control Management API Reference explains how to work with Change Control Management's API. The API Reference is available in CHM format on the Mercury Change Control Management CD-ROM.

Mercury Change Control Management Readme provides information on last-minute known problems and limitations. The Readme is available in HTML format on the Mercury Change Control Management CD-ROM.

Additional Online Resources

Customer Support Web Site uses your default Web browser to open the Mercury Customer Support Web site. This site enables you to browse the Mercury Support Knowledge Base and add your own articles. You can also post to and search user discussion forums, submit support requests, download patches and updated documentation, and more. The URL for this Web site is <http://support.mercury.com>.

Mercury Home Page uses your default Web browser to access Mercury's Web site. This site provides you with the most up-to-date information on Mercury and its products. This includes new software releases, seminars and trade shows, customer support, educational services, and more. The URL for this Web site is <http://www.mercury.com>.

Mercury Best Practices contain guidelines for planning, creating, deploying, and managing a world-class IT environment. Mercury provides three types of best practices: Process Best Practices, Product Best Practices, and People Best Practices. Licensed customers of Mercury software can read and use the Mercury Best Practices available from the Customer Support site, <http://support.mercury.com>.

Documentation Updates

Mercury is continually updating its product documentation with new information. You can download the latest version of this document from the Customer Support Web site (<http://support.mercury.com>).

To download updated documentation:

- 1** In the Customer Support Web site, click the **Documentation** link.
- 2** Under **Please Select Product**, select Change Control Management.

Note that if the required product does not appear in the list, you must add it to your customer profile. Click **My Account** to update your profile.

- 3** Click **Retrieve**. The Documentation page opens and lists the documentation available for the current release and for previous releases. If a document was updated recently, **Updated** appears next to the document name.
- 4** Click a document link to download the documentation.

Typographical Conventions

This guide uses the following typographical conventions:

| | |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| UI Elements | This style indicates the names of interface elements on which you perform actions, file names or paths, and other items that require emphasis. For example, “Click the Save button.” |
| <i>Arguments</i> | This style indicates method, property, or function arguments and book titles. For example, “Refer to the <i>Mercury User’s Guide</i> .” |
| < Replace Value > | Angle brackets enclose a part of a file path or URL address that should be replaced with an actual value. For example, < MyProduct installation folder >\bin. |
| Example | This style is used for examples and text that is to be typed literally. For example, “Type Hello in the edit box.” |
| CTRL+C | This style indicates keyboard keys. For example, “Press ENTER.” |
| Function_Name | This style indicates method or function names. For example, “The wait_window statement has the following parameters:” |
| [] | Square brackets enclose optional arguments. |
| { } | Curly brackets indicate that one of the enclosed values must be assigned to the current argument. |
| ... | In a line of syntax, an ellipsis indicates that more items of the same format may be included. In a programming example, an ellipsis is used to indicate lines of a program that were intentionally omitted. |
| | A vertical bar indicates that one of the options separated by the bar should be selected. |

Welcome to This Guide

1

Introduction to Mercury Change Control Management

This chapter provides an overview of Mercury Change Control Management, describing the various sections of the application. It also includes information on how to access Change Control Management.

Note: In this book, the Change Control Management report application is referred to as Change Control Management.

| This chapter describes: | On page: |
|---------------------------------------|----------|
| Overview of Change Control Management | 2 |
| Accessing Change Control Management | 3 |

Overview of Change Control Management

Change Control Management provides information on the components in an IT environment that will be impacted by planned changes, proactively sends notifications of the business risk involved in each planned change, and identifies potential collisions between concurrently scheduled changes. Based on this information, the change managers and Change Advisory Board in your organization can evaluate the way in which to proceed with each planned change.

Change Control Management contains the following tabs:

- ▶ **Dashboard.** Designed for IT managers, this tab displays change request data in real time, using graphical displays. For details on this tab, see Chapter 2, “Working with the Dashboard.”
- ▶ **Change Impact.** Displays change requests affecting the applications in your IT environment. For each change request, the following is displayed:
 - ◆ a summary of the change
 - ◆ the applications and configuration items (CIs) affected by the change
 - ◆ details of the change
 - ◆ the notifications triggered as a result of the impact analysis of the change
 - ◆ the other change requests that conflict with the change

In addition, the Change Impact tab provides both a change request filter mechanism and a view of all user notifications sent by Change Control Management. For details on this tab, see Chapter 3, “Viewing Data in the Change Impact Tab.”

- ▶ **User Settings.** Displays reconfigurable properties of the current Change Control Management user and enables you to select the applications you want to associate with this user. For details on this tab, see Chapter 4, “Configuring User Settings.”

- ▶ **Administration.** (viewed by the administrator only) – Enables the administrator to define and edit user properties, assign default applications to users, view the users associated with each application, and assign users to specific applications. For details on this tab, see Chapter 5, “Administering Mercury Change Control Management.”
- ▶ **Help.** Displays the online version of the *Mercury Change Control Management User’s Guide*.

Accessing Change Control Management

You access Change Control Management using a Web browser, from any computer with a network connection (intranet or Internet) to the Change Control Management server.

To access the Change Control Management login page and log in to Change Control Management:

- 1** In the Web browser, enter the URL **http://<server_name>/ccm**, where **server_name** is the name or IP address of the Change Control Management server. If, during the installation process, a Tomcat server was selected instead of a Web server, this URL should point to port 8080.
- 2** Enter the login parameters (user name and password) of a user defined by the administrator and assigned to you, and click **Log In**. After logging in, the user name appears at the top right of the screen, under the top menu bar.

To log out of Change Control Management:

When you have completed your session, click **Logout** at the top right of the screen.

2

Working with the Dashboard

This chapter describes how to work with the Mercury Change Control Management Dashboard, which displays change request data in real time, using graphical displays.

Note: This chapter describes the Dashboard features available to the regular user. If you are an administrator, contact Mercury Customer Support for assistance in working with the additional Dashboard features available to you.

| This chapter describes: | On page: |
|--------------------------------|-----------------|
| Viewing the Default Portlets | 6 |
| Personalizing the Dashboard | 15 |

Viewing the Default Portlets

When you click the Dashboard tab, the Change Control Management Default Page opens, displaying the following four portlets:

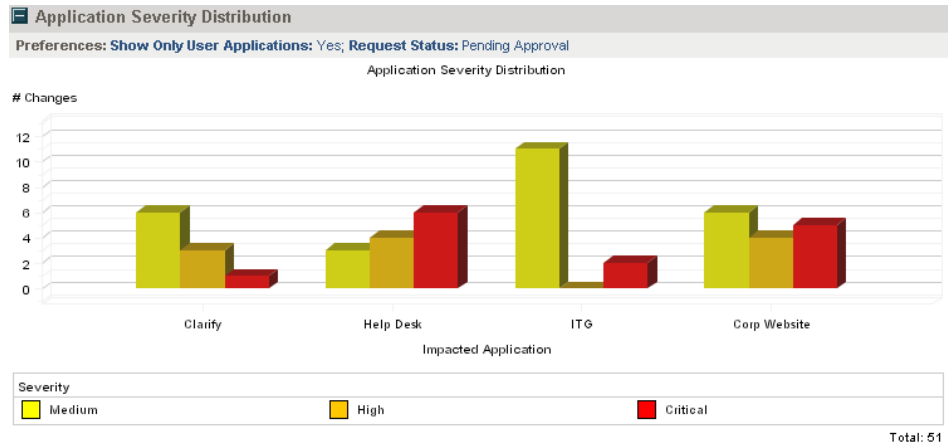
- ▶ Application Severity Distribution – for details, see page 7
- ▶ Application Status Distribution – for details, see page 9
- ▶ Change Request Impact Analysis Ratio – for details, see page 11
- ▶ New and Closed Change Requests Over Time – for details, see page 13

Notes:

- ▶ To create a PDF of the Change Control Management Default Page data, click **Export to PDF** in the top right corner of the page.
 - ▶ The administrator can preconfigure any preference for any portlet. By default, however, no preferences are preconfigured for the Change Control Management Default Page.
 - ▶ The administrator can also require a preference to be defined before a portlet is displayed. By default, however, portlets on the Change Control Management Default Page are displayed according to the default preference options.
-

Application Severity Distribution

The Application Severity Distribution portlet displays the number of change requests at each severity level, per application, for the request status selected by the user.



For example, the above graph shows that the Help Desk application has:

- 3 “Pending Approval” change requests with a severity level of **Medium**
- 4 “Pending Approval” change requests with a severity level of **High**
- 6 “Pending Approval” change requests with a severity level of **Critical**

To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - ▶ **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Application Severity Distribution portlet.
 - ▶ **Show Only User Applications.** You can modify the default option whereby data is displayed only for those applications associated with the current user. (You associate applications with the current user in the User Settings' User Applications tab – for details, see “Associating Applications with the Current User” on page 49.) To display data for all IT applications affected by the change requests that Change Control Management processes, select **No** under **Show Only User Applications**.
 - ▶ **Request Status.** You can modify the default option whereby data is displayed only for requests with a “Pending Approval” status. To display data for requests with a different status, select the required status from the **Request Status** selection box.
 - ▶ **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

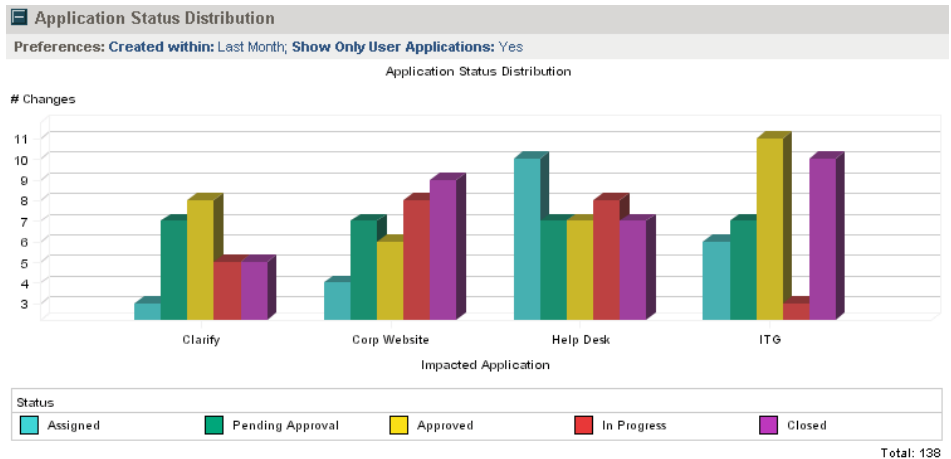
To maximize the Application Severity Distribution portlet:



Click the **Maximize** button. A magnified view of the Application Severity Distribution portlet is displayed on a page by itself. To return to the original view, click the **Back** button.

Application Status Distribution

The Application Status Distribution portlet displays the number of change requests for each request status level, per application, that were created within the time frame selected by the user.



For example, the above graph shows that the following change requests affecting the Help Desk application were created during the last month:

- 10 change requests with a current status level of **Assigned**
- 7 change requests with a current status level of **Pending Approval**
- 7 change requests with a current status level of **Approved**
- 8 change requests with a current status level of **In Progress**
- 7 change requests with a current status level of **Closed**

To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Application Status Distribution portlet.
 - **Created Within.** You can choose to display data for change requests that were created within a time frame other than the default one, “Last Month.” To display data for change requests created within a different time frame, select **Last Week** or **Last Two Weeks** from the **Created Within** selection box.
 - **Show Only User Applications.** You can modify the default option whereby data is displayed only for those applications associated with the current user. (You associate applications with the current user in the User Settings’ User Applications tab – for details, see “Associating Applications with the Current User” on page 49.) To display data for all IT applications affected by the change requests that Change Control Management processes, select **No** under **Show Only User Applications**.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

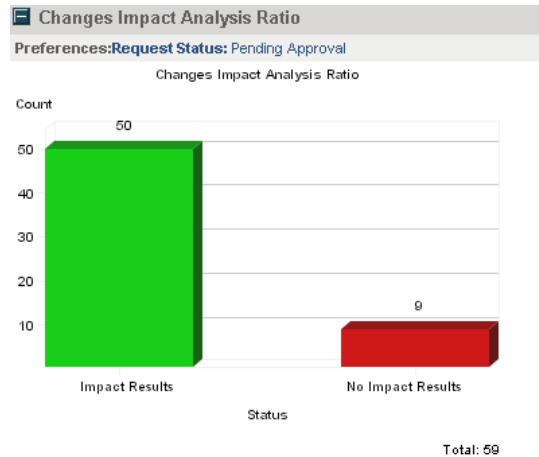
To maximize the Application Status Distribution portlet:



Click the **Maximize** button. A magnified view of the Application Status Distribution portlet is displayed on a page by itself. To return to the original view, click the **Back** button.

Change Request Impact Analysis Ratio

The Change Request Impact Analysis Ratio portlet displays both the number of change requests for which impact analysis results were available as well as the number of change requests for which impact analysis results were not available, for the request status selected by the user.



For example, the above graph shows the following:

- Impact analysis results were available for 50 “Pending Approval” change requests.
- Impact analysis results were unavailable for 9 “Pending Approval” change requests.

To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the Change Request Impact Analysis Ratio portlet.
 - **Request Status.** You can modify the default option whereby data is displayed only for requests with a “Pending Approval” status. To display data for requests with a different status, select the required status from the **Request Status** selection box.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

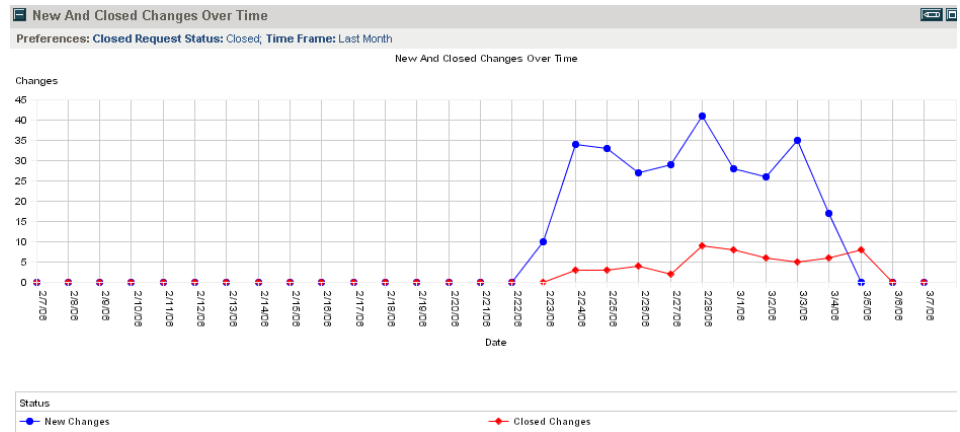
To maximize the Change Request Impact Analysis Ratio portlet:



Click the **Maximize** button. A magnified view of the Change Request Impact Analysis Ratio portlet is displayed on a page by itself. To return to the original view, click the **Back** button.

New and Closed Change Requests Over Time

The New and Closed Change Requests Over Time portlet displays the number of change requests with the request status of “New” as well as the number of change requests with the request status of “Closed” (or the status equated with that of “Closed”) during the time frame selected by the user.



For example, the above graph shows the following:

- ▶ There were between 10 and 40 “New” change requests from the 23rd until the 28th of February, and between 40 and 17 “New” change requests from the 28th of February until the 4th of March.
- ▶ There were 2 to 10 “Closed” change requests on any given day between the 24th of February and the 5th of March.

To modify the display preferences:



- 1** Click the **Edit** button. The Edit Preferences page opens, displaying the following options:
 - **Change Title.** Clicking this button opens the Change Portlet Title window in which you can enter an alternative title for the New and Closed Change Requests Over Time portlet.
 - **Time Frame.** You can choose to display data for change requests within a time frame other than the default one, “Last Week.” To display data for change requests within a different time frame, select **Last Two Weeks** or **Last Month** from the **Time Frame** selection box.
 - **Status of “Closed” Requests.** Change Control Management enables the customization of the request status field. It is therefore possible that your service desk application uses a status other than “Closed” to refer to closed requests. To display requests of this status as “Closed” requests in the New and Closed Change Requests Over Time portlet, enter this status for the **Status of “Closed” Requests** preference. For example, if you mark “Closed” change requests as “Completed” in your service desk application, you would enter **Completed** here.
 - **Display preferences summary on portlet.** Although, by default, preferences are displayed as part of the portlet, you can choose to view the portlet without a display of the preferences. To do so, clear the **Display preferences summary on portlet** check box.
- 2** Click **Done** to save your preference settings and return to the default Dashboard page.

To maximize the New and Closed Change Requests Over Time portlet:



- Click the **Maximize** button. A magnified view of the New and Closed Change Requests Over Time portlet is displayed on a page by itself. To return to the original view, click the **Back** button.

Personalizing the Dashboard

You can personalize the Dashboard by adding pages, choosing the portlets to be displayed on a page, and specifying the positions of the portlets on the page.

You personalize pages and portlets in the Personalize Dashboard window, which you can access by clicking the **Personalize** button in the top right corner of the current page, or the **Personalize** button in the top menu.

This section describes:

- “Adding Pages” on page 15
- “Modifying Pages” on page 17
- “Adding Portlets” on page 19
- “Managing Portlets” on page 21

Adding Pages

You can add new blank pages to the Dashboard and then populate them with portlets.

You can also add preconfigured pages (also referred to as modules), if you have been assigned the necessary privileges. Preconfigured pages are sets of pages containing portlets that the administrator has already created.

To add a new page to the Dashboard:

- 1 In the Personalize Dashboard window, click **Add Blank Page**. The following window is displayed:

The screenshot shows the 'Personalize Dashboard' window. At the top, there are buttons for 'Add Blank Page' and 'Add Pre-configured Pages'. Below these is a 'Page Name' field containing 'New Page' and a 'Switch to page...' dropdown menu. To the right are 'Delete Page' and 'Reorder Pages' buttons. Below the page name field is an 'Add Portlets' button and a checkbox for 'Automatically refresh this page every' followed by a text input field for minutes. A note says 'Click and drag to select and move portlets' and 'Drag outside box to cancel movement'. At the bottom, there is a 'Selected Portlet:' section with a 'Copy' button, a 'Move to Page:' dropdown menu showing 'Requirements', and a 'Move' button. At the very bottom right are 'Save' and 'Done' buttons.

- 2 In the **Page Name** box, enter a name for the new page.
- 3 Click **Save** to create the page. The new page is added to the list that is displayed when you click the **Switch to page** button.

This screenshot shows the 'Personalize Dashboard' window after a page has been created. The 'Page Name' field now contains 'Change Requests by Application and Priority'. The 'Switch to page...' dropdown menu is open, showing two options: 'CCM Default Page' and 'Change Requests by Application and Priority'. The 'Automatically refresh this page every' checkbox is now checked. The 'Selected Portlet:' section now shows 'CCM Default Page' in the dropdown menu. The 'Save' and 'Done' buttons are visible at the bottom right.

After creating the page, you can populate it with portlets. For more information, see “Adding Portlets” on page 19.

- 4 Specify how often you want the data on the page to be refreshed by selecting the **Automatically refresh this page every X minutes** check box and entering the refresh rate. By default, the Dashboard does not refresh pages.

5 Select one of the following options:

- ▶ Click **Save** to apply your changes and continue working in the Personalize Dashboard window.
- ▶ Click **Done** to save your changes and close the Personalize Dashboard window.

When you click **Done**, the Dashboard displays the new page you created. When the page is viewed for the first time, a square mark is displayed next to the page name in the **Switch to page** list.

To add a preconfigured page to the Dashboard:

- 1** In the Personalize Dashboard window, click **Add Preconfigured Pages**. The Add Preconfigured Pages to Dashboard window opens, displaying a list of all the sets of preconfigured pages that you can add to the Dashboard.
- 2** Select the preconfigured pages that you want to add. The pages are added to the **Switch to page** list.

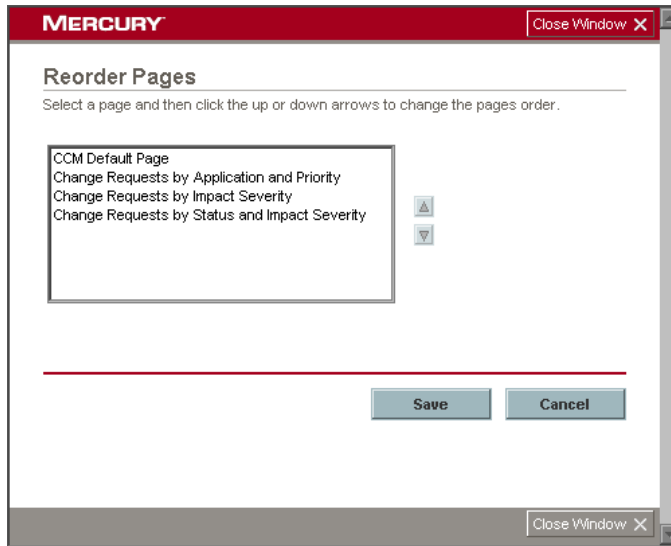
Modifying Pages

You can change the order of the Dashboard pages in the **Switch to page** list. You can also rename and remove pages, and modify the refresh rate of a page.

To modify a page:

- 1** Open the Personalize Dashboard window.

- ▶ To change the position of a page in the **Switch to page** list, click **Reorder Pages**. The Reorder Pages window opens.



Select the page that you want to move, and click the arrows to move it up or down in the list. Click **Save**. The page appears in its new position in the **Switch to page** list.

- ▶ To rename a page, use the **Switch to page** button to display the page in the Personalize Dashboard window and enter a new name in the **Page Name** box.
- ▶ To remove a page from the Dashboard, use the **Switch to page** button to display the page in the Personalize Dashboard window and click the **Delete Page** button.
- ▶ To modify the refresh rate of a page, use the **Switch to page** button to display the page in the Personalize Dashboard window, then select the **Automatically refresh this page every X minutes** check box and specify a new refresh rate.
- ▶ To add portlets to a page, see “Adding Portlets” on page 19.
- ▶ To modify how portlets are displayed on a page, see “Managing Portlets” on page 21.

2 Select one of the following options:

- Click **Save** to apply your changes and continue working in the Personalize Dashboard window.
- Click **Done** to save your changes and close the Personalize Dashboard window.

Adding Portlets

You can add portlets to a selected page. Note that to optimize the time that it takes to load a page and make the page easy to view, it is recommended that you limit the number of portlets on a page to six.

To add a portlet to a page:

- 1** In the Personalize Dashboard window, select the page to which you want to add portlets and click **Add Portlets**. The Add Portlets to Dashboard Page: <name of page> window opens.

MERCURY Close Window X

Add Portlets to Dashboard Page: Change Requests by Application and Priority

Specify portlets by name or category to see a list of portlets to add to your page.

Search for Portlets to Add

Portlet Name:

Category:

Find Portlets

Add Cancel

- 2** In the **Portlet Name** box, enter the name of the portlet you want to add to the page and click **Add**.

Alternatively, click **Find Portlets** to display a list of available portlets, select the portlets that you want to add to the page, and click **Add**.

MERCURY Close Window X

Add Portlets to Dashboard Page: Change Requests by Application and Priority

Specify portlets by name or category to see a list of portlets to add to your page.

Search for Portlets to Add

Portlet Name:

Category:

Find Portlets

Add Cancel

Select Portlets to Add 4 Results

| Portlet Name | Description | Category |
|--------------------------------------------------------------|-------------|----------|
| <input type="checkbox"/> Changes By Application and Severity | | |
| <input type="checkbox"/> Changes By Application and Status | | |
| <input type="checkbox"/> Changes Impact Analysis Ratio | | |
| <input type="checkbox"/> New And Closed Changes Over Time | | |

Add Cancel

The portlets you specified are added to the page in the Personalize Dashboard window.

To rearrange the order in which the portlets are displayed, or to move or remove portlets from a page, see “Managing Portlets” on page 21.

3 Select one of the following options:

- ▶ Click **Save** to apply your changes and continue working in the Personalize Dashboard window.
- ▶ Click **Done** to save your changes and close the Personalize Dashboard window.

When you click **Done**, the added portlets are displayed on the selected page.

Managing Portlets

This section describes the following Dashboard functionality:

- ▶ Arranging Portlets on a Page – for details, see page 21
- ▶ Moving and Copying Portlets to Other Pages – for details, see page 22
- ▶ Renaming Portlets – for details, see page 23
- ▶ Removing Portlets from Pages – for details, see page 24

Arranging Portlets on a Page

You can determine the layout of the portlets on each of the Dashboard pages.

To arrange the portlets on a page:

- 1 In the Personalize Dashboard window, select the portlet that you want to move. Selecting the portlet causes it to be highlighted on the page.

Personalize Dashboard

Add Blank Page Add Preconfigured Pages Save Done

Page Name: CCM Default Page Switch to page... Delete Page Reorder Pages

Add Portlets Automatically refresh this page every 0 minutes

Click and drag to select and move portlets

Drag outside box to cancel movement

Changes By Application and Severity → ⇄ ← [icon] [X]

Changes By Application and Status → ⇄ ← [icon] [X]

Changes Impact Analysis Ratio ← ⇄ → [icon] [X]

New And Closed Changes Over Time ← ⇄ → [icon] [X]

Selected Portlet: Copy Move to Page: Change Requests by Application and Priority [dropdown] Move

- 2 Drag the portlet to its new position.

For each portlet you want to move, repeat steps 1 and 2.

3 Select one of the following options:

- ▶ Click **Save** to apply your changes and continue working in the Personalize Dashboard window.
- ▶ Click **Done** to save your changes and close the Personalize Dashboard window.

When you click **Done**, the portlets appear in their new positions on the selected page.

Moving and Copying Portlets to Other Pages

You can move portlets from one page to another. You can also copy an existing portlet to another page. The ability to move or copy portlets depends on the privileges that you have been assigned by the administrator.

Note: To optimize the time that it takes to load a page and make the page easy to view, it is recommended that you limit the number of portlets on a page to six.

To move a portlet to another page:

- 1** In the Personalize Dashboard window, select the portlet that you want to move.
- 2** In the **Move to Page** list, select the page to which you want to move the portlet.

Move to Page:

- 3** Click **Move**. The portlet is moved to the selected page.

4 Select one of the following options:

- ▶ Click **Save** to save the portlet on the new page and continue working in the Personalize Dashboard window.
- ▶ Click **Done** to save the portlet on the new page and close the Personalize Dashboard window.

When you click **Done**, the portlet is displayed on its new page. Note that you can position the portlet on the new page as described in “Arranging Portlets on a Page” on page 21.

To copy a portlet to another page:

- 1** Select the portlet that you want to copy and click **Copy**. A copy of the portlet is created and added to the current page.

Note: The new portlet’s name is the original portlet’s name preceded by **Copy of**. To rename the copied portlet, see “Renaming Portlets” on page 23.

- 2** Move the new portlet to the destination page as described in the previous procedure.

Renaming Portlets

Renaming a portlet is useful when the same portlet is duplicated with different preferences in each copy.

To rename a portlet:

- 1** In the Personalize Dashboard window, select the portlet that you want to rename and click **Edit**. The Edit Preferences: <name of portlet> window opens.
- 2** Click **Change Title**. The Change Portlet Title window opens.
- 3** Enter the new name (with a maximum of 30 characters) in the **Title** box and click **Change**. The selected portlet is displayed with the new title.

Removing Portlets from Pages

You can remove a portlet from a Dashboard page. Note that this does not affect other occurrences of the portlet on other Dashboard pages.

To remove a portlet from a page:



- 1** In the Personalize Dashboard window, select the portlet that you want to remove, and click the **Remove** button.
- 2** Select one of the following options:
 - ▶ Click **Save** to apply your changes and continue working in the Personalize Dashboard window.
 - ▶ Click **Done** to save your changes and close the Personalize Dashboard window.

The portlet is removed from the selected Dashboard page.

3

Viewing Data in the Change Impact Tab

This chapter describes how to view change request details, as well as the impact analysis results, user notifications, and collisions for each request, in the Change Impact tab. It also describes how to use the change request filter mechanism and view details of all user notifications sent by Change Control Management.

| This chapter describes: | On page: |
|-----------------------------------|-----------------|
| Viewing Change Request Details | 26 |
| Viewing Impact Analysis Results | 31 |
| Viewing User Notifications | 33 |
| Viewing Change Request Collisions | 37 |
| Using Filters | 40 |

Viewing Change Request Details

By default, the Change Requests pane displays a grid view of both changes and tasks (which can be viewed by expanding a change).

Note: Change Control Management automatically selects the first filter in the filter tree and displays the change requests that meet the criteria for this filter in the Change Requests pane. For details on selecting or defining a different filter, see “Using Filters” on page 40.

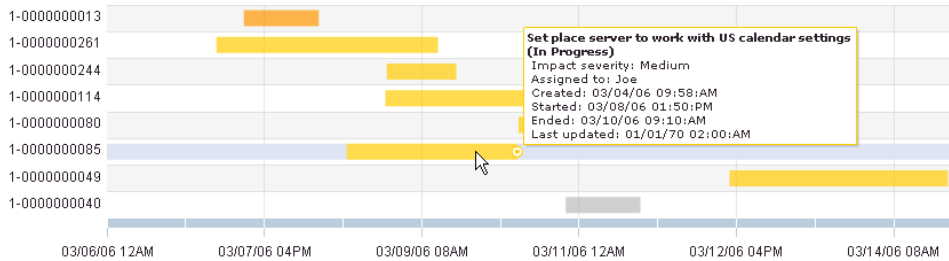
Unless otherwise customized by the administrator, the Grid View tab includes the following columns:

| Column | Description |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Summary | Displays a brief description of the change or task. |
| Impact Severity icon | Displays the Change Control Management-calculated impact severity level of the change or task. The severity level for the change/task is determined by the highest severity level of the configuration items affected by the change/task. For example, a change/task will be assigned a severity level of “Critical” even if only one configuration item affected by the change/task is assigned a severity level of “Critical.” |

| Column | Description |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Impact Severity icon (continued) | <p>Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following colors indicate the following impact severity levels:</p> <ul style="list-style-type: none"> ▶ Red – Critical ▶ Orange – High ▶ Yellow – Medium ▶ Khaki – Low ▶ Green – Very Low ▶ Gray – No impact analysis available for the change/task <p>Note that a tooltip indicating the impact severity level of the change/task is visible when you hold your mouse over the severity level icon.</p> |
| Request ID | Displays the reference ID number of the change/task in the service desk application. |
| Created | Displays the date on which the change/task was created. |
| Priority | Displays the Change Control Management priority level of the change/task. When you configure Change Control Management, you configure the priority levels that can be assigned to a change request. |
| Status | Displays the Change Control Management status of the change/task. When you configure Change Control Management, you configure the statuses that can be assigned to a change request. |
| Contact Person | Displays the name of the user responsible for the change/task. |

Note: For details on customizing the Grid View tab, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

The Timeline View tab displays a start-to-end timeline for each change or task, as shown in the following example.



By default, both the Grid View and Timeline View tabs display data for 20 change requests (to reconfigure this number, see “Configuring User Properties for the Current User” on page 48). You can navigate between groups of change requests using the **Previous** and **Next** arrows and jump to the first or last request using the **First** and **Last** arrows.



To refresh the data displayed in the Grid View or Timeline View tabs, click the **Refresh** button.



You can e-mail a change or task by selecting it and clicking the **Send E-Mail** button. In the Send E-Mail dialog box, enter the e-mail address of each recipient of the e-mail, enter any comments you have on the change/task, and click the **Send** button.



You can print details of a change or task by selecting it, clicking the **Print** button, and then clicking **Print** in the change request summary dialog box that opens.



When you are viewing a task in the Grid View or Timeline View tabs, you can click the **Go to Parent Request** button to display the change with which the task is associated (which previously may or may not have been displayed in the Change Requests pane).



Note: For details on filtering the change requests displayed in the Change Requests pane, see “Using Filters” on page 40.

To view a summary of data for a change request:

Select the change or task and ensure that the **Summary** tab beneath the displayed change requests is selected. The following summary information is provided:

- ▶ The service desk application from which the change or task originated – A link is provided to the Change Details tab, in which the request ID number of the original change request is also displayed.
- ▶ The scheduled time and duration of the change's or task's execution – A link is provided to the Change Details tab, in which the start and end times of the change's or task's execution are displayed.
- ▶ The number of configuration items (CIs) and applications that are affected by the change or task – The names and statuses of the CIs and applications are provided when you hold your mouse over the text. A link is also provided to the Impact Analysis tab, in which details of the affected applications and CIs are displayed.
- ▶ The number of users who received notification of the change or task – A link is provided to the Notifications tab, in which the names of the users who received notifications of the change/task and the dates on which they received the notifications are displayed.

To view additional details of a change request:

Select the change or task and click the **Request Details** tab beneath the displayed change requests. Unless otherwise customized by the administrator, the Request Details tab displays the following data:

| Field | Description |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Service desk | The service desk application in which the change request originated. |
| Contact person | The name of the user responsible for the change request. |
| Priority | The Change Control Management priority level of the change request. When you configure Change Control Management, you configure the priority levels that can be assigned to a change request. |

| Field | Description |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Estimated risk | The estimated risk level that was assigned to the change request by a user. |
| Created | The exact time at which the change request was originally created in the service desk application. |
| Planned start | The time recorded in the request at which the execution of the change or task is scheduled to begin. |
| Planned end | The time recorded in the request at which the execution of the change or task is scheduled to end. |
| Request ID | The reference ID number of the change request in the service desk application. |
| Contact location | The geographic location of the person responsible for the change request. |
| Impact severity | The Change Control Management-calculated impact severity level of the change request. For further details, see the description of the impact severity icon on page 26. |
| Last impact analysis | The exact time at which an impact analysis was last calculated. |
| Last updated | The exact time at which the change request was last updated in the service desk application. |
| Actual start | The exact time at which execution of the change or task actually began. |
| Actual end | The exact time at which execution of the change or task actually ended. |
| Description | A description of the change or task, taken from the request's Description field. |

Note: For details on customizing the Request Details tab, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

Viewing Impact Analysis Results

You view the impact analysis calculation results for a change request in the **Impact Analysis** tab. The data in this tab is organized in two ways: according to affected applications and according to affected configuration items (CIs).

If you choose to view impact results according to the applications affected by a change or task, Change Control Management displays the following from left to right:

- ▶ a list of the applications affected by the change/task
- ▶ a hierarchy of CIs associated with each application that were either changed or affected by the change/task
- ▶ details of each displayed CI in the CI hierarchy

Note: CIs that are affected by a change or task, but are not associated with any applications are displayed under an application entitled **Unassociated**.

If you choose to view impact results according to the CIs affected by a change or task, Change Control Management displays the following from left to right:

- ▶ a hierarchy of CIs that were either changed or affected by the change/task
- ▶ details of each displayed CI in the CI hierarchy
- ▶ a list of affected applications associated with each CI

The impact severity level of an application is based on the highest impact severity level of the application's associated CIs. For example, if there are three CIs associated with an application and one has an impact severity level of "Low," another an impact severity level of "Medium," and the third an impact severity level of "Critical," the application will be assigned an impact severity level of "Critical."

By default, the following colors indicate the following impact severity levels:

- ▶ Red – Critical
- ▶ Orange – High
- ▶ Yellow – Medium
- ▶ Khaki – Low
- ▶ Green – Very Low
- ▶ Gray – No impact analysis available

Note: The correlation of each impact severity level with a color-coded icon is configurable.



If a CI was changed as a result of the change/task, a black circle surrounds the impact severity level icon.

A tooltip indicating the impact severity level of the application or CI is visible when you hold your mouse over the severity level icon. **CCI** indicates that the CI was changed as a result of the change/task. **ACI** indicates that the CI was affected by the modification of the change/task.

To the left of each application name is an icon indicating whether the application is associated with the current user. This information is also available in a tooltip (**My Application** or **Not My Application**) when you hold your mouse over the icon or name of the application. For details on associating applications with a user, see “Associating Applications with the Current User” on page 49.

For each CI, you can view the attribute names by which Change Control Management identified the CI (defined during the Change Control Management configuration process). If you are viewing impact analysis results by application, Change Control Management also displays a list of other applications with which the selected CI or one of its children (within the CI hierarchy) is associated.

| JACKET - (host) | |
|---------------------|--------------------------------------------------------------------------|
| DNS Name: | jacket.mercury.com |
| Host Name: | JACKET |
| Host OS: | Windows 2000 |
| SNMP Name: | JACKET |
| Vendor: | Intel |
| Also Appears Under: | <input type="checkbox"/> Corp Website <input type="checkbox"/> Siebel |

Viewing User Notifications

User notifications are displayed by Change Control Management in two ways:

- for the current user, in the User Notifications pane
- for each change request, in the Notifications tab

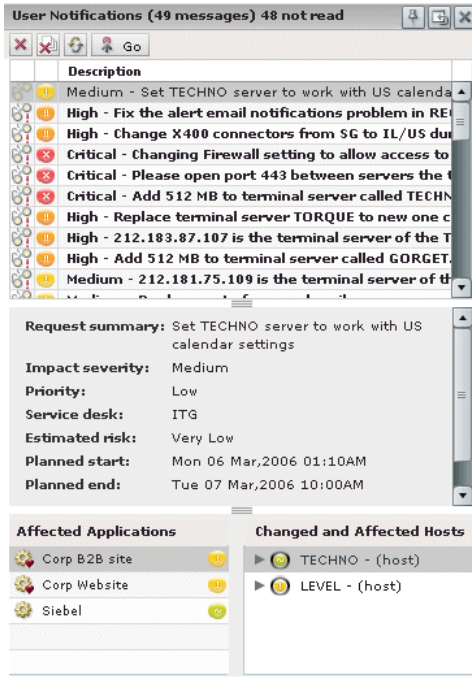
Viewing Notifications for the Current User

The User Notifications pane displays the notifications triggered for the applications associated with the current user. (You associate applications with the current user in the User Settings' User Applications tab – for details, see “Associating Applications with the Current User” on page 49.)

To view notifications for the current user:



- 1 Click the **Notifications** button to the left of the Change Requests pane. The User Notifications pane opens, displaying a list of notifications for the current user.





For each notification, you can view the following:


| Entity | Description |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Read/Not Read icon | Indicates whether the current user has viewed the notification. |
| Impact Severity icon | Displays the Change Control Management-calculated severity level for the change request whose impact analysis triggered the notification. For further details, see the description of the impact severity icon on page 26. |


| Entity | Description |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description | Provides a description of the notification , including the impact severity level and the subject of the e-mail notification. |
| Request summary | Displays a brief description of the change request whose impact analysis triggered the notification. The summary displayed here is identical to the change request summary displayed in the Change Requests pane. |
| Impact severity | Displays the Change Control Management-calculated impact severity level of the change request whose impact analysis triggered the notification. For further details, see the description of the impact severity icon on page 26. |
| Priority | Displays the Change Control Management priority level of the change request whose impact analysis triggered the notification. When you configure Change Control Management, you configure the priority levels that can be assigned to a change request. |
| Service desk | Displays the service desk application in which the change request whose impact analysis triggered the notification originated. |
| Estimated risk | Displays the estimated risk level that was assigned by a user to the change request whose impact analysis triggered the notification. |
| Planned start | Displays the time at which the execution of the change request whose impact analysis triggered the notification is scheduled to begin. |
| Planned end | Displays the time at which the execution of the change request whose impact analysis triggered the notification is scheduled to end. |


| Entity | Description |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Affected Applications | Displays the applications affected by the change request whose impact analysis triggered the notification. To the left of the application name is an icon indicating whether the application is associated with the current user. To the right of the application name is an impact severity icon indicating the impact severity level of the application, which is based on the highest impact severity level of the application's associated CIs. For more information on this section, see "Viewing Impact Analysis Results" on page 31. |
| Changed and Affected Hosts | Displays a hierarchy of CIs associated with each application that were either changed or affected by the by the change request whose impact analysis triggered the notification. To the left of the CI is an impact severity icon indicating the impact severity level of the CI. For more information on the CI impact severity icon, see "Viewing Impact Analysis Results" on page 31. |


- 

➤ To delete one or more notifications, select the notification(s), click the **Delete** button, and click **Yes** to confirm.
- 

➤ To delete all the displayed notifications, click the **Delete All** button, and click **Yes** to confirm.
- 

➤ To refresh the display of notifications in the User Notifications pane, click the **Refresh** button.
- 

➤ To display the request whose impact analysis triggered a notification, select the notification and click the **Go to Related Request** button. The request is displayed in the Change Requests pane.
- 

➤ To display the Change Requests pane to the right of the User Notifications pane, click the **Pin Sidebar** button. You can then expand or contract the User Notifications pane as required. To restore the User Notifications pane to its original size, click the **Restore Sidebar** button.
- 

2 Click the **Close** button to close the User Notifications pane.

Viewing Notifications for a Change Request

You can view the notifications that were triggered as a result of the impact analysis of a specific change or task in the change request's Notifications tab.

To view the notifications triggered for a specific change request:

Select the change or task in the Change Requests pane and click the **Notifications** tab. The tab displays the date and time of each notification, the user who received the notification, and an icon indicating whether the user viewed the notification in the Users Notification pane. You can send an e-mail with a summary of the request for which a notification was triggered to the recipient of the notification by clicking the **Send E-Mail to Selected Users** button and then **Send** in the Send E-Mail dialog box.



Viewing Change Request Collisions

You can view the change requests that overlap or conflict with a change or task in the Collisions tab.

To view change requests that conflict with a change or task:

- 1 Select the change or task in the Change Requests pane and click the **Collisions** tab.
- 2 Select one of the following time frame options:
 - **Use the change request time frame.** Change Control Management searches for conflicting or overlapping change requests among those changes or tasks that are to be executed at the same time as the selected request.
 - **Define a collision time frame.** Enter start and end dates and times. Change Control Management searches for conflicting or overlapping change requests among those changes or tasks that are to be executed during the defined time frame.

- 3 Click **Calculate Collisions**. The change requests that conflict with the selected change or task are displayed in a pane that resembles the Change Requests pane.

| Summary | Planned Start | Planned End | Request ID |
|---------------------------------------------------------|---------------|-------------|--------------|
| 212.187.90.142 is the terminal server of the TW group | 03/07/06 | 03/09/06 | 2-0000000081 |
| SOX Remediation and Validation of GCRM Servers | 03/07/06 | 03/09/06 | 2-0000000260 |
| due to changes in 212.190.90.41 (new departments were a | 03/09/06 | 03/10/06 | 1-0000000174 |
| Deployment of new webmail server | 03/09/06 | 03/11/06 | 2-0000000193 |
| | | | |
| | | | |
| | | | |
| | | | |

The following columns are displayed in this pane:

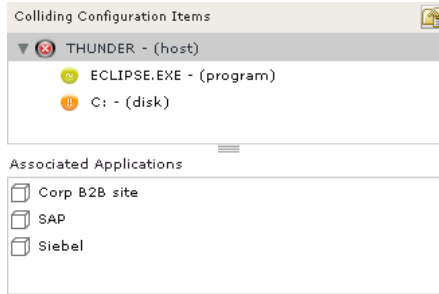
| Column | Description |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Collision Severity icon | <p>Displays the Change Control Management-calculated collision severity level for the change or task. The collision severity level is calculated in the following manner:</p> <ul style="list-style-type: none"> ▶ Change Control Management checks whether the two requests' planned start or end times overlap. ▶ If the planned start or end times of the two requests overlap, Change Control Management checks whether the two requests have CIs in common and whether these common CIs were changed or affected by a modification (CCI or ACI). The collision severity level is then set according to the following rules: <ul style="list-style-type: none"> • CCI-CCI + overlap = Critical • CCI-CCI + no overlap = High • CCI-ACI + overlap = Medium • CCI-ACI + no overlap = Low • ACI-ACI = Very Low |

| Column | Description |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Collision Severity icon (continued) | <p>Although the correlation of each severity level with a color-coded icon is configurable, by default the following colors indicate the following severity levels:</p> <ul style="list-style-type: none"> ▶ Red – Critical ▶ Orange – High ▶ Yellow – Medium ▶ Khaki – Low ▶ Green – Very Low ▶ Gray – No impact analysis available <p>Note that a tooltip indicating the severity level of the collision is visible when you hold your mouse over the collision severity icon.</p> |
| Summary | Displays a brief description of the conflicting change or task. |
| Planned Start | Displays the time at which the execution of the conflicting change or task is scheduled to begin. |
| Planned End | Displays the time at which the execution of the conflicting change or task is scheduled to end. |
| Request ID | Displays the reference ID number of the conflicting change request in the service desk application. |

- ▶ To display a planned start-to-end timeline for each change or task, click **Timeline View**. The start-to-end timeline of the original request selected in the Change Requests pane is displayed in black at the top of the timeline.
- ▶ To view details of a change or task, select it and click the **Request Details** button.
- ▶ To recalculate the change request collisions, click the **New Collision Calculation** button.
- ▶ To view a conflicting change or task in the Change Requests pane, select the request and click the **Go to Colliding Request** button.



- 4 Select a change or task to view the hierarchy of configuration items that are affected by the collision of the originally selected request with this change/task. The Collisions tab displays the impact severity level of each CI in the CI hierarchy as well as the applications with which each CI is associated.



To view the attribute name(s) by which Change Control Management identifies a CI (defined during the Change Control Management configuration process), select the CI and click the **CI Attributes** button.



Using Filters

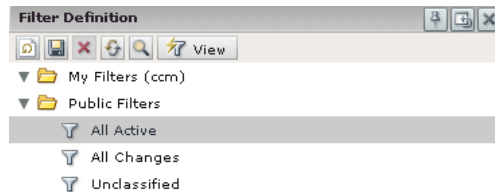
You can use any combination of the following filters to view only requests that meet certain conditions:

- ▶ **General.** Enables you to filter requests by type; by service desk origin; by priority, impact severity, estimated risk, and/or status levels; and/or by the user responsible for the request.
- ▶ **Applications.** Enables you to view only requests that affected all or specified applications, or only requests for which impact analysis results are unavailable.
- ▶ **Time Conditions.** Enables you to view only requests whose planned and/or actual execution started and/or ended during a specified time frame.

Note: Although the above pre-defined filters cannot be modified, the Change Control Management administrator can create additional customized filters, if required. For details on creating customized filters, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

To define a new filter:

- 1 Click the **Filters** button to the left of the Change Requests pane. The Filter Definition pane opens, displaying a list of existing personal or public filters for the current user.



| General | |
|--------------------------------------------|-------------|
| Request type | Change |
| <input type="checkbox"/> Service desk | |
| <input checked="" type="checkbox"/> Status | In Progress |
| <input type="checkbox"/> Impact severity | |
| <input type="checkbox"/> Priority | |
| <input type="checkbox"/> Estimated risk | |
| <input type="checkbox"/> Contact person | |
| Applications | |
| Time Conditions | |

Note: Ensure that you select **My Filters** or **Public Filters** before proceeding.

- 2 Under **General**, select the request type—**Change** or **Task**—according to which you want to filter requests. Note that you cannot include both changes and tasks in the same filter.
- 3 Optionally, select to filter according to one or more of the following request fields:
 - ▶ **Service desk.** Select a service desk application. Change requests originating in this service desk application will be included in the filter.
 - ▶ **Status.** Select one or more statuses. Change requests with the selected status(es) will be included in the filter.
 - ▶ **Impact severity.** Select one or more impact severity levels. Change requests with the selected severity level(s) will be included in the filter.

Note: You can filter according to impact severity only if you selected **Requests affecting all applications** or **Requests affecting selected applications** in the Applications filter.

- ▶ **Priority.** Select one or more priority levels. Change requests with the selected priority level(s) will be included in the filter.
- ▶ **Estimated risk.** Select one or more estimated risk levels. Change requests with the selected estimated risk level(s) will be included in the filter.
- ▶ **Contact person.** Enter a string that matches the name of a contact person, or use an asterisk (*) to match a string to several contact people. (For example, if you use the string **Da***, both **David** and **Danny** will match.) Change requests for which the specified contact people are responsible will be included in the filter.

- 4** To filter the change requests displayed by impact condition, click **Applications**. Select one of the following filter options:
- ▶ **Requests with unknown impact results.** The filter will include only change requests for which there are no impact analysis results.
 - ▶ **Requests affecting all applications.** The filter will include change requests whose impact analysis results affect all applications.
 - ▶ **Requests affecting the selected applications.** The filter will include only change requests whose impact analysis results affect the applications you select in the selection box.

Note: If you select **Requests affecting all applications** or **Requests affecting the selected applications**, you can select the impact severity level according to which you want to filter the requests. For details, see step 3 above.

- 5** To filter the change requests displayed by time condition, click **Time Conditions**. Select one or more of the following options:
- ▶ **Planned Start.** Select a date from the calendar and enter an exact hour in the time box. Choose **Before, After, Between, Last Hour, Last Day, Last Week, or Last Month** from the selection box. The filter will include the change requests that were scheduled to begin during the specified time interval.
 - ▶ **Planned End.** Select a date from the calendar and enter an exact hour in the time box. Choose **Before, After, Between, Last Hour, Last Day, Last Week, or Last Month** from the selection box. The filter will include the change requests that were scheduled to end during the specified time interval.
 - ▶ **Actual Start.** Select a date from the calendar and enter an exact hour in the time box. Choose **Before, After, Between, Last Hour, Last Day, Last Week, or Last Month** from the selection box. The filter will include the change requests whose execution actually began during the specified time interval.

- ▶ **Actual End.** Select a date from the calendar and enter an exact hour in the time box. Choose **Before, After, Between, Last Hour, Last Day, Last Week, or Last Month** from the selection box. The filter will include the change requests whose execution actually ended during the specified time interval.

Note: If you created customized filters, you can filter the change requests displayed according to these filters by selecting the appropriate filter options.

Tip: You can clear the filter properties you defined and start anew by clicking the **Clear** button.



- 6 Click the **Save** button. In the Save Filter dialog box, enter a name for the new filter you are creating. If you are an administrator, you can enable the filter you are creating to be viewed by all users by selecting the **Public Filter** check box.
- 7 Click **OK** to save the filter. If you are a regular user, the filter appears in the **My Filters** list. If you are an administrator and selected the **Public Filter** check box, the filter appears in the **Public Filters** list.

To modify an existing filter:

- 1 In the Filter Definition pane, select the filter whose properties you want to modify and edit the filter properties as required.
- 2 Click the **Save** button and click **OK** in the Save Filter dialog box to save the new filter properties.



To delete a filter:

- 1 In the Filter Definition pane, select the filter you want to delete and click the **Delete** button.
- 2 Click **Yes** to confirm the deletion of the filter.

To refresh the list of filters displayed in the Filter Definition pane:

In the Filter Definition pane, click the **Refresh List** button. The lists of filters under both **My Filters** and **Public Filters** are updated.

To search for a specific change request:

- 1 In the Filter Definition pane, click the **Find** button.
- 2 Select or enter the ID number of the change request you want to locate. Note that you can use the asterisk (*) to expand your search. For example, if you enter 123*, all requests whose request ID begins with the numbers 123 are displayed.
- 3 Click **Find**. The request is displayed in the Change Requests pane.



Tips: To display the Change Requests pane to the right of the Filter Definition pane, click the **Pin Sidebar** button. You can then expand or contract the Filter Definition pane as required. To restore the Filter Definition pane to its original size, click the **Restore Sidebar** button.



To view the Change Requests pane only, click the **Close** button.

To view change requests that meet the criteria of a defined filter:



In the Filter Definition pane, select the filter for which you want to view change requests and click the **View Filtered Change Requests** button. The change requests that meet the criteria of the selected filter are displayed in the Change Requests pane.

Note: If the selected filter was modified but not saved, then when you click the **View Filtered Change Requests** button, requests that meet the criteria of the modified filter are displayed.



Tips: To display the Change Requests pane to the right of the Filter Definition pane, click the **Pin Sidebar** button. You can then expand or contract the Filter Definition pane as required. To restore the Filter Definition pane to its original size, click the **Restore Sidebar** button.



To view the Change Requests pane only, click the **Close** button.

4

Configuring User Settings

This chapter describes how to configure user properties for the current Mercury Change Control Management user and select the applications you want to associate with the current user.

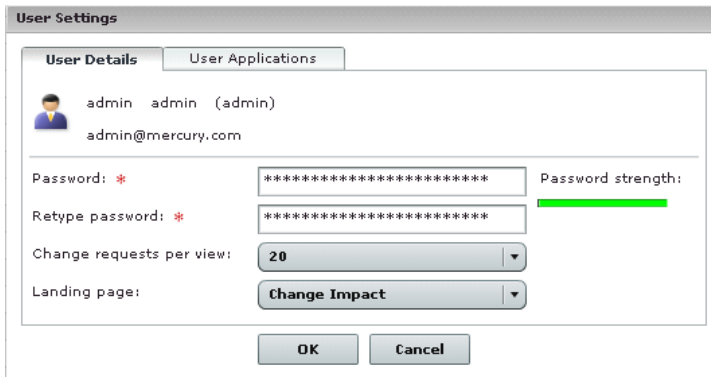
| This chapter describes: | On page: |
|--------------------------------------------------|----------|
| Configuring User Properties for the Current User | 48 |
| Associating Applications with the Current User | 49 |

Configuring User Properties for the Current User

You can view the properties of the current Change Control Management user that were configured by the administrator and reconfigure these properties, if necessary, in the User Settings dialog box.

To view and configure user properties for the current user:

- 1 Click the **User Settings** tab. The User Settings dialog box opens, displaying the properties of the current Change Control Management user.



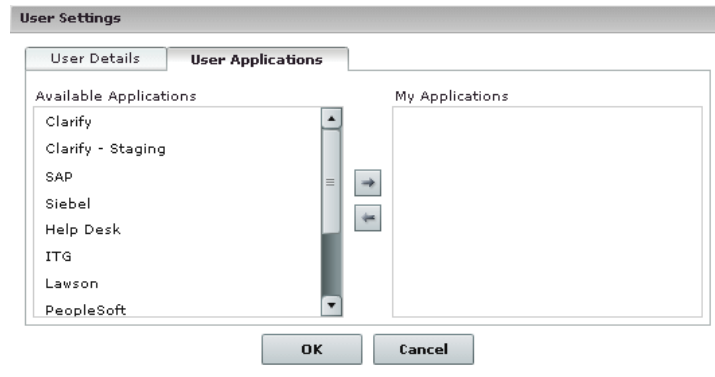
- 2 To change the user's password, type a new password in the **Password** box and retype this password in the **Retype password** box. The strength of the new password you selected is indicated by the Password strength bar on the right.
- 3 To modify the number of requests displayed by default in the Change Requests pane, select **10**, **30**, **40**, or **50** from the **Change requests per view** box.
- 4 To change the tab displayed by default when you open Change Control Management, select **Dashboard** or **Administration** from the **Landing page** box.
- 5 Click **OK** to save the modified user properties and close the User Settings dialog box.

Associating Applications with the Current User

Although the administrator is responsible for the initial association of applications with users, it is possible to associate additional applications with the current user or, in certain cases, remove the association of applications with the current user in the User Settings dialog box.

To associate applications with the current user:

- 1 Click the **User Settings** tab. The User Settings dialog box opens.
- 2 Click the **User Applications** tab. The available applications are displayed in the **Available Applications** list and the applications already associated with the current user are displayed in the **My Applications** list.



- 3 To associate an application with the current user, select the application in the **Available Applications** list and click the top arrow. The application appears in the **My Applications** list.
- 4 To remove the association of an application with the current user, select the application in the **My Applications** list and click the bottom arrow. The application is removed from the **My Applications** list. Note that it is possible to remove the association of an application with the current user only if the administrator did not require the user to view data for the application by enforcing the application for the user.
- 5 Click **OK** to save the association settings and close the User Settings dialog box.

5

Administering Mercury Change Control Management

This chapter describes how the administrator can define and edit user settings, associate applications with certain users, view the users associated with each application, and associate users with specific applications.

Note: This chapter describes the Administration tab, which can be viewed by the administrator only.

| This chapter describes: | On page: |
|-------------------------------------|----------|
| Configuring Users | 52 |
| Associating Users with Applications | 55 |

Configuring Users

You can configure user settings for new Mercury Change Control Management users, edit the settings of existing users, and delete users in the Users tab.

Configuring User Settings

You define a new user by configuring settings—including basic user details and associated applications—for the user.

To configure user settings:

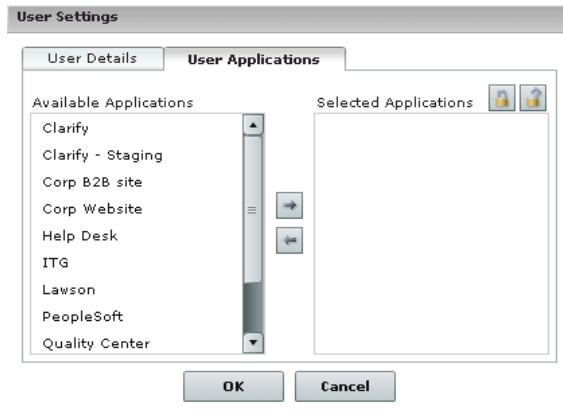
- 1 Click **New** at the bottom of the Users tab. The User Settings dialog box opens.

- 2 Enter the following user settings:

| Column | Description |
|-------------------|--------------------------------------------------------------------------------------|
| Login name | The user name by which the user will be able to log in to Change Control Management. |
| First name | The first name of the user you are defining. |
| Last name | The surname of the user you are defining. |

| Column | Description |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| E-Mail address | The e-mail address of the user you are defining. This is the e-mail address to which notifications will be sent for this user. |
| Password | The password by which the user will be able to log in to Change Control Management. |
| Retype password | Confirms the password entered in the previous box. |

- 3 From the **User role** box, select **Administrator** or **User** to define the type of user you want to create. Note that only the administrator has administrative privileges.
- 4 To associate applications with the user you are defining, click the **User Applications** tab, select the applications you want to associate with the user from the **Available Applications** list, and click the top arrow. The applications appear in the **Selected Applications** list.



- 5 To ensure that the user will receive notifications related to a specific application, select the application and click the **Enforce Application** button. When this option is selected, the user cannot remove the association with the application.



To restore the user's ability to choose whether or not to receive notifications related to this application, select the application and click the **Stop Enforcing Application** button.



- 6 Click **OK** to save your settings and close the User Settings dialog box. The new user is added to the Change Control Management database and is listed in the Users tab.

Modifying User Settings

As an administrator, you can modify the settings of an existing Change Control Management user.

To modify user settings:

- 1 Select the user whose settings you want to modify and click **Edit** at the bottom of the Users tab. The User Settings – <Name of User> dialog box opens.

The screenshot shows a dialog box titled "User Settings - CCM User". It has two tabs: "User Details" and "User Applications". The "User Details" tab is active and contains the following fields:

- User name: * [ccm]
- First name: * [CCM User]
- Last name: * []
- E-Mail address: * [ccm@mercury.com]
- Password: * [*****]
- Retype password: * [*****]
- User role: * [User]

At the bottom of the dialog are "OK" and "Cancel" buttons.

- 2 Modify the user details and applications associated with the user as required. For a description of user settings, see “Configuring User Settings” on page 52.
- 3 Click **OK** to save your changes and close the User Settings – <Name of User> dialog box.

Deleting Users

You can delete any previously defined Change Control Management users.

To delete users:

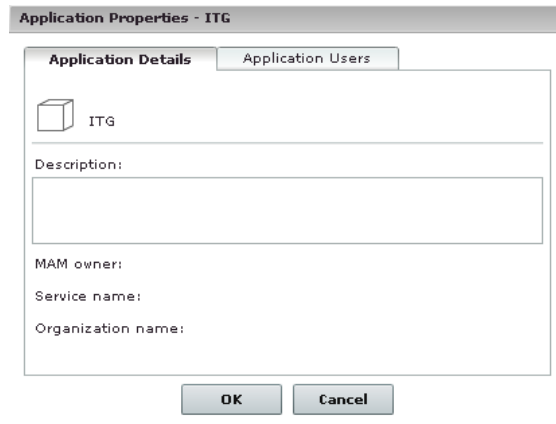
- 1 Select the user(s) you want to delete and click the **Delete** button at the bottom of the Users tab.
- 2 Click **Yes** to confirm deletion. Change Control Management deletes the user(s) from the application.

Associating Users with Applications

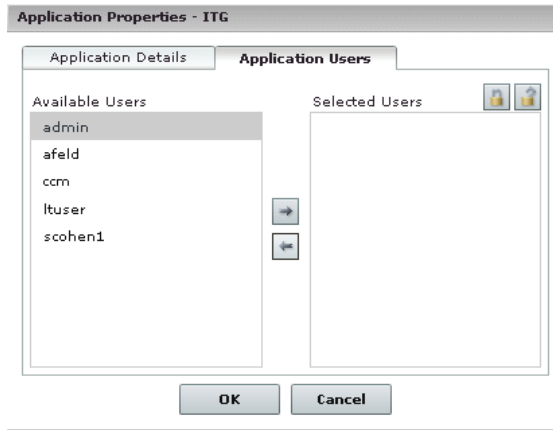
You can view details of the IT applications affected by the change requests that Change Control Management processes and associate specific users with these applications in the Applications tab.

To associate specific Change Control Management users with an application:

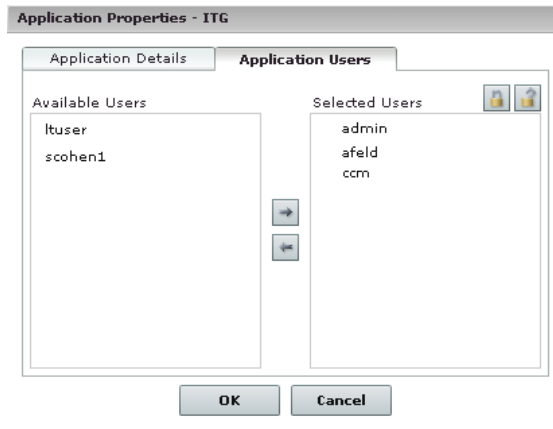
- 1 Click the **Applications** tab and select the application you want to associate with one or more users.
- 2 Click **Edit** at the bottom of the Applications tab. The Application Properties – <Application Name> dialog box opens, displaying a description of the application as well as other Mercury Application Mapping-related details of the application.



- 3 Click the **Application Users** tab. A list of the Change Control Management users previously defined by the administrator is displayed in the **Available Users** column.



- 4 Select the users you want to associate with the application from the **Available Users** list, and click the top arrow. The users appear in the **Selected Users** list.





- 5** To ensure that a user will receive notifications related to this application, select the user and click the **Enforce Application** button. When this option is selected, the user cannot remove the association with the application.

To restore the user's ability to choose whether or not to receive notifications related to this application, select the user and click the **Stop Enforcing Application** button.



- 6** Click **OK** to save your settings and close the Application Properties – <Application Name> dialog box.
- 7** To view the users you associated with the application, click the **Refresh** button at the bottom of the Applications tab. The users are displayed in the **Users** column.

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