OPTIMIZE

MERCURY CHANGE CONTROL MANAGEMENT™

User's Guide

Version 2.0

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BUSINESS TECHNOLOGY OPTIMIZATION

Mercury Change Control Management™

User's Guide

Version 2.0

Document Release Date: September 28, 2006

MERCURY™

Mercury Change Control Management User’s Guide, Version 2.0

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CCMUG2.0/01

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 **The Change Analysis Module at a Glance**

Introduces the key elements in the Change Analysis module.

Chapter 4 Viewing and Filtering Change Requests

Describes the layout of the different change request views in the Change Analysis module and describes how to filter the change requests.

Chapter 5 Viewing Change Request Details and Change Analysis Information

Describes the information presented for each change request in the Change Analysis Module. This information includes details about each change request and change analysis information such as impact, collision and risk analysis. Instructions are also provided for working with both the commenting the notifications feature.

Chapter 6 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.

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.

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."
Arguments	This style indicates method, property, or function arguments and book titles. For example, "Refer to the *Mercury User's Guide*."
<**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.

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.

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 modules:

➤ **Dashboard.** Designed for IT managers, this tab displays change request data in real time, using graphical displays. For details on this module, see Chapter 2, "Working with the Dashboard."

➤ **Change Analysis.** 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 originating from the service desk application
- the notifications triggered as a result of the impact analysis of the change
- the other change requests that conflict with the change
- the potential risk involved in implementing the change
- comments posted by other users in response to the change request

In addition, the Change Analysis module provides both a change request filter mechanism and a view of all user notifications sent by Change Control Management. For details on this module, see Chapter 3, "The Change Analysis Module at a Glance."

➤ **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 module, see Chapter 6, "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, assign users to specific applications, and modify the fields settings and risk factors. For details on this module, refer to the *Mercury Change Control Management Installation and Configuration Guide*.
- **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.

Viewing the Default Portlets

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

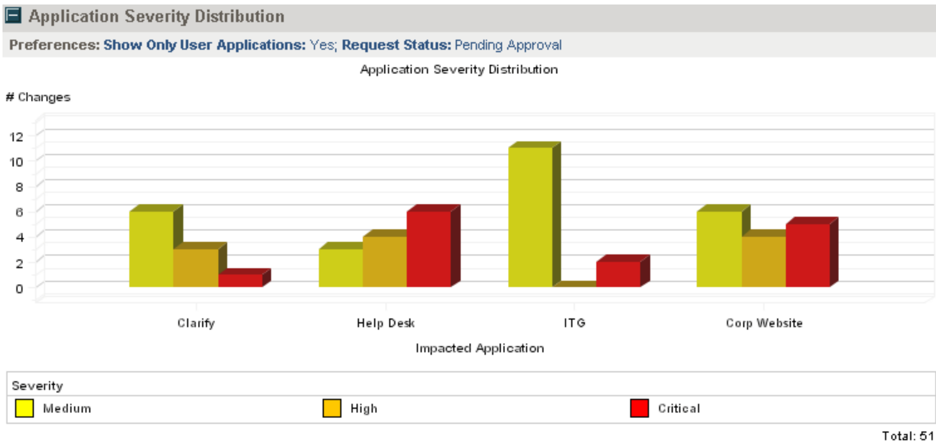
- Application Severity Distribution – for details, see page 7
- Application Status Distribution – for details, see page 9
- Change Request Impact Analysis Ratio – for details, see page 11
- New and Closed Change Requests Over Time – for details, see page 13

Notes:

- If you are the first user logging on to the application since the time the server was started, the Dashboard may take a few minutes to load. The next time you enter the Dashboard, it will load immediately.
- 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 89.) 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.

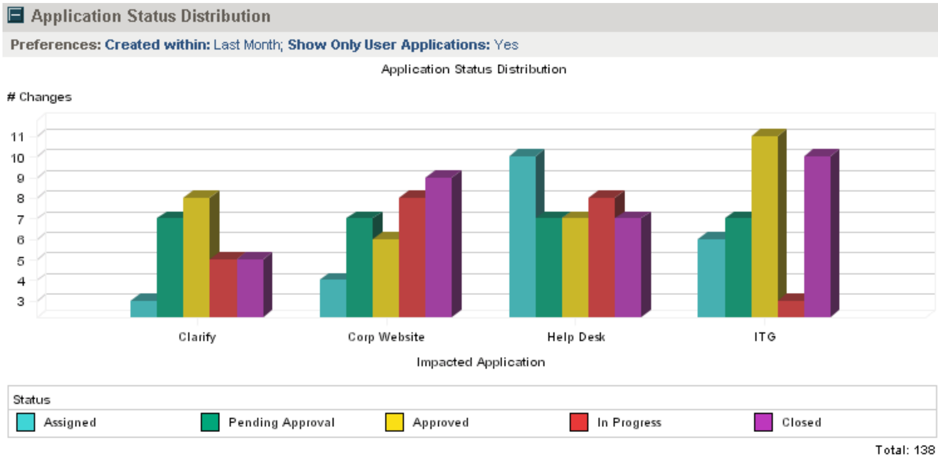
2 Click **Done** to save your preference settings and return to the default Dashboard page.

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 89.) 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.

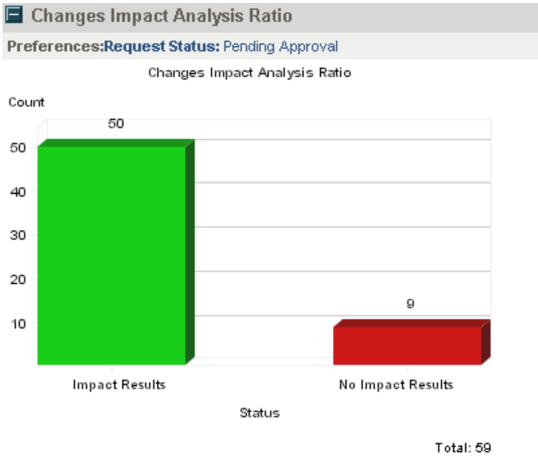
2 Click **Done** to save your preference settings and return to the default Dashboard page.

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.

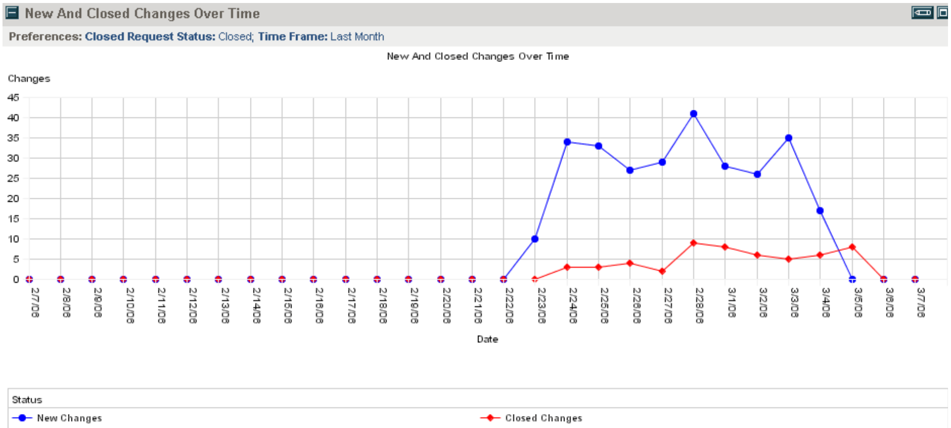
2 Click **Done** to save your preference settings and return to the default Dashboard page.

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

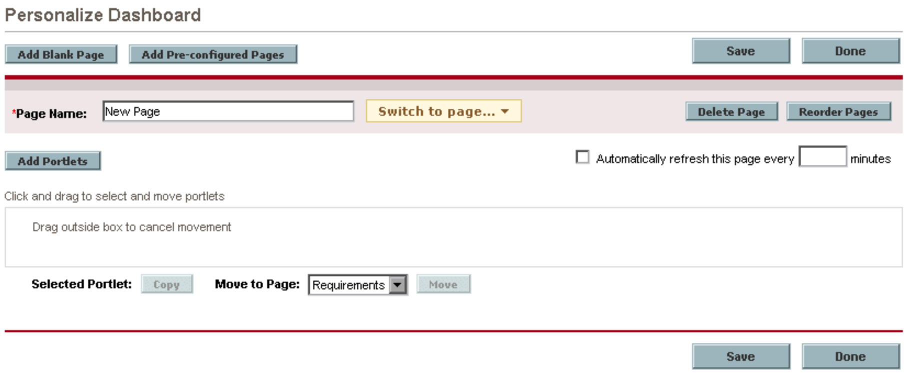
Adding Pages

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.

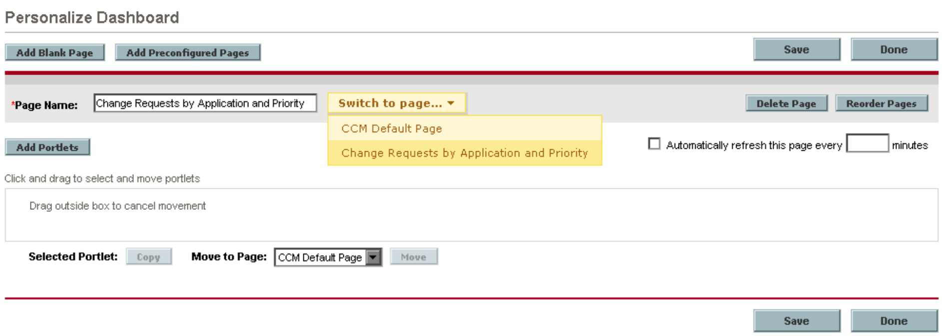
To add a new page to the Dashboard:

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



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.



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.

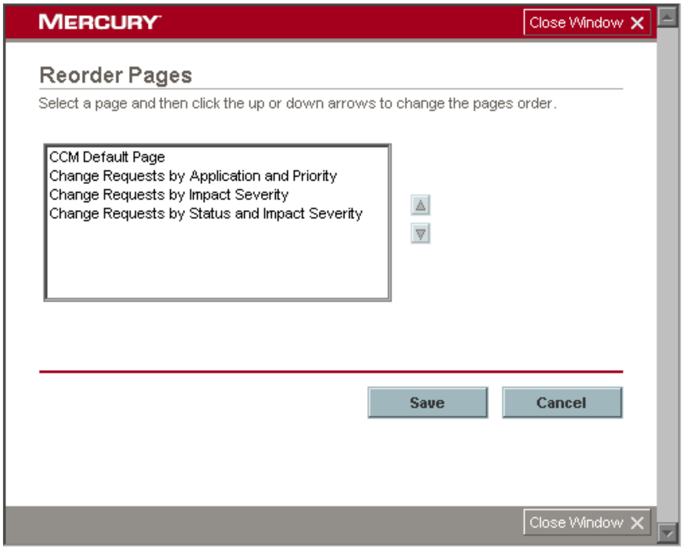
Modifying Pages

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:

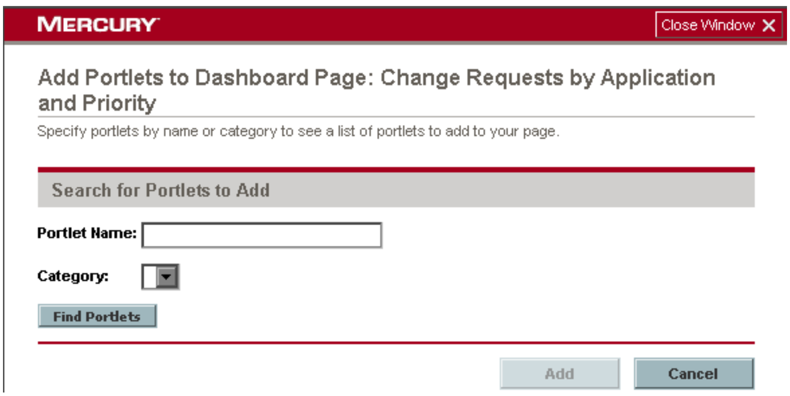
- ➤ Click **Save** to apply your changes and continue working in the Personalize Dashboard window.
- ➤ Click **Done** to save your changes and close the Personalize Dashboard window.

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.

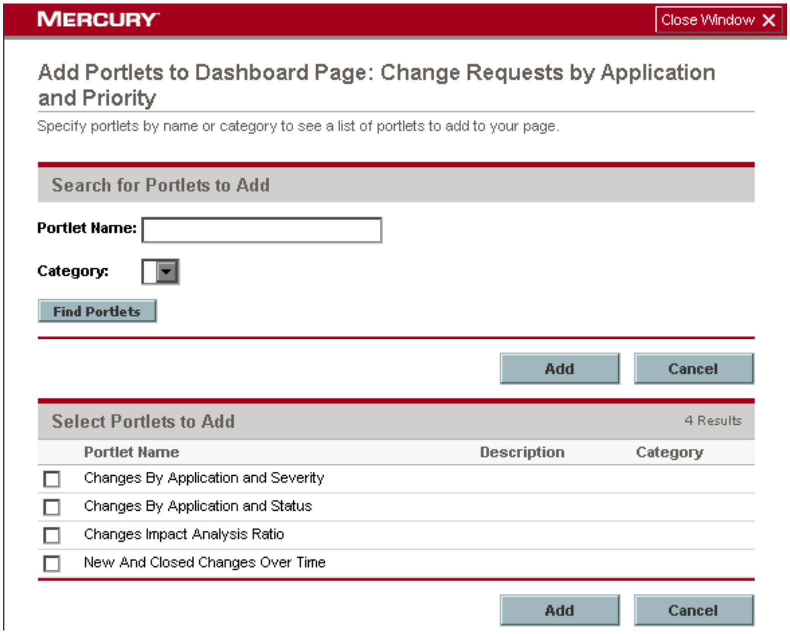
To add a portlet to a page:

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.



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**.



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:

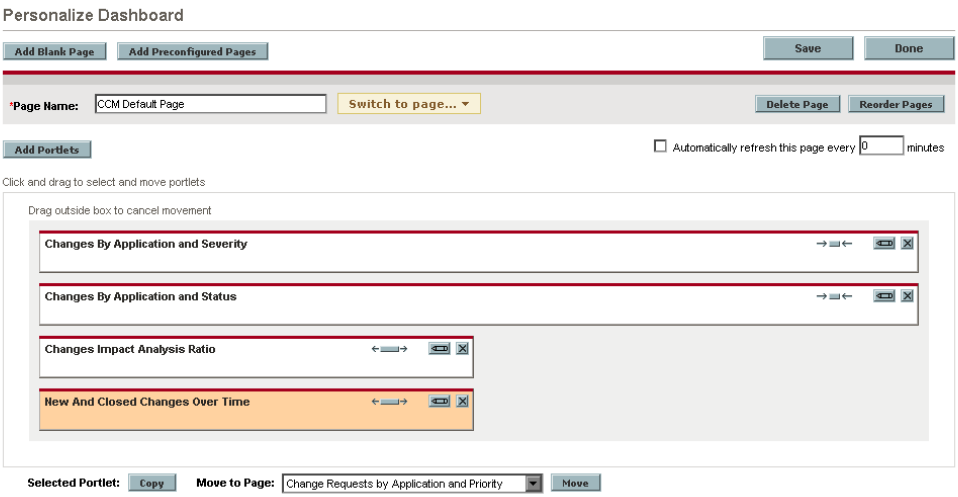
- Arranging Portlets on a Page – for details, see page 21
- Moving and Copying Portlets to Other Pages – for details, see page 22
- Renaming Portlets – for details, see page 23
- Removing Portlets from Pages – for details, see page 24

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.



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.

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.

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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.

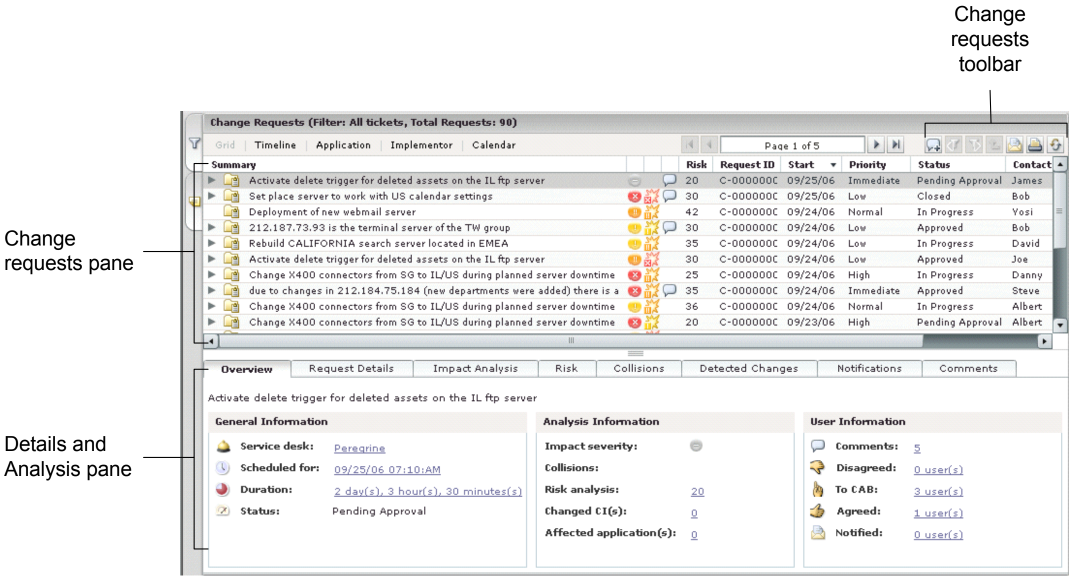
3

The Change Analysis Module at a Glance

This chapter introduces the key elements in the Change Analysis module.

Understanding the Change Analysis Module

The Change Analysis module displays all the change requests that have been processed by Change Control Management. You can use the filter mechanism to display only those change requests that meet certain criteria. For each change request, the Change Analysis module presents detailed information, including risk and impact analysis.



The Change Analysis module includes the following components:

➤ **Change Requests pane.** Displays the change requests according to the filter definitions and the selected view type. For more information, see "Viewing Change Requests" on page 27.

➤ **Details and Analysis pane.** Displays details and analysis information for each individual change request selected in the Change Requests pane. For more information, see "Viewing Change Request Details and Analysis Data" on page 28.

➤ **Change Requests toolbar.** Contains commands for navigating between the change requests and performing various actions on individual change requests. For more information, see "Working with the Change Requests Toolbar" on page 29.

- **Filters button.** Opens the Filter Definition pane, which allows you to filter the change requests displayed in the Change Requests pane. For more information, see “Filtering Change Requests” on page 43.

- **Notifications button.** Opens the User Notifications pane, which displays the notifications sent to the current user. For more information, see “Viewing User Notifications” on page 63.

Viewing Change Requests

You view the change requests in the Change Requests pane of the Change Analysis module. You can view the change requests from a number of different perspectives by selecting one of the available views. You can also filter the displayed change requests. The following views are available:

- **Grid view.** Change requests are displayed in the form of a sortable table. For more information, see “Viewing Change Requests in a Grid” on page 33.
- **Timeline view.** Change requests are displayed as blocks of time on a timeline. Each change request is displayed on a separate row. For more information, see “Viewing Change Requests on a Timeline” on page 37.

Note: The Grid view and Timeline view are synchronized—the order of appearance of change requests and the amount of change requests per page is the same for both views.

- **Application view.** Change requests are displayed as blocks of time on a timeline and are grouped according to the affected applications. For more information, see “Viewing Change Requests from Different Perspectives” on page 38.
- **Implementor view.** Change requests are displayed as blocks of time on a timeline and are grouped according to the implementor. For more information, see “Viewing Change Requests from Different Perspectives” on page 38.

- **Calendar view.** Displays the change requests planned for each calendar day. For more information, see "Viewing Change Requests in a Calendar" on page 41.

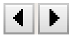
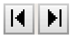
Viewing Change Request Details and Analysis Data

Change Control Management displays analysis information and details about each change request in the Details and Analysis pane of the Change Analysis module. This information is displayed in the following tabs:

- **Summary.** Provides a general overview of the information pertaining to the selected change request. For more information, see "Viewing Change Request Overviews" on page 56.
- **Request Details.** Displays the change request details that originate from the service desk application. For more information, see "Viewing Change Request Details" on page 58.
- **Impact Analysis.** Displays the applications and configuration items (CIs) that will be affected by the change request. For more information, see "Viewing Impact Analysis Results" on page 60.
- **User Notifications.** Displays the notifications that were triggered for the selected change request. For more information, see "Viewing User Notifications" on page 63.
- **Collisions.** Displays the other change requests that collide with the selected change request. For more information, see "Viewing Change Request Collisions" on page 67.
- **Comments.** Displays user comments opinions pertaining to the selected change request. For more information, see "Viewing Change Request Comments" on page 76.
- **Risk.** Displays the risk analysis for each change request, using both numerical and graphical data. For more information, see "Viewing Change Request Risk Analysis" on page 78.
- **Detected Changes.** Displays all the detected changes that match the selected change request. For more information, see "Viewing Detected and Latent Changes" on page 84.

Working with the Change Requests Toolbar

The change requests toolbar contains the following buttons:

Icon	Name	Description
	**Previous and Next arrows**	Used to navigate between pages of change requests.
	**First and Last Page arrows**	Used to jump to the first or last page of change requests.
	**Page box**	Used to jump to a specific page of change requests. • To do this, highlight the text in the **Page** box, type the page number, and press ENTER. If you type a page that is not within the available page range, the **Page** box is outlined in red and you are required to retype a page number that falls within the correct range.
	**Add Comment**	Opens the Add Comment dialog box, which is used to add a new comment. For more information, see “Adding Comments to Change Requests” on page 77.
	**Back and Forward Filter buttons**	Used to navigate between previously viewed filters.
	**Go to Parent Request**	Displays the parent change request for the selected child change request. Only applicable in the Grid View and Timeline View.
	**Send E-Mail**	Used to Send a change request by e-mail. • To send a change request by e-mail, select the change request that you want to send and click 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 additional comments you have on the change request, and click the **Send** button.

Icon	Name	Description
	**Print Preview**	Displays a printable version of the selected change request. • To print details of a change request, select the relevant change request, click the **Print Preview** button and then click **Print** in the change request summary dialog box that opens.
	**Refresh**	Refreshes the data displayed in the Change Requests pane.

4

Viewing and Filtering Change Requests

The Change Analysis module displays all the change requests that have been processed by Change Control Management. You can view the change requests from a number of different perspectives by selecting one of the available views. You can also filter the displayed change requests.

This chapter explains the layout of the different change request views and describes how to filter the change requests.

Viewing Change Requests

The Change Requests pane of the Change Analysis module displays the change requests that have been processed by Change Control Management. You can view the change requests in one of the following change request views:

- **Grid view.** See “Viewing Change Requests in a Grid” on page 33.
- **Timeline view.** See “Viewing Change Requests on a Timeline” on page 37.
- **Application view.** See “Viewing Change Requests from Different Perspectives” on page 38.
- **Implementor view.** See “Viewing Change Requests from Different Perspectives” on page 38.
- **Calendar view.** See “Viewing Change Requests in a Calendar” on page 41.

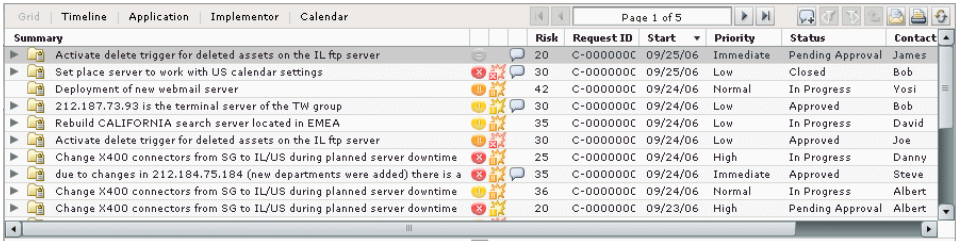
Note: You can filter the displayed change requests. For more information, see “Filtering Change Requests” on page 43. Change Control Management automatically selects the first filter in the filter tree and displays the change requests that meet the criteria for this filter in the Change Requests pane.

When a filter is in place, it filters the change requests in all of the different views in the Change Request pane.

You can navigate between groups of change requests in the different views using the change requests toolbar. For more information, see “Working with the Change Requests Toolbar” on page 29.

Viewing Change Requests in a Grid

The Grid view in the Change Analysis module, displays change requests in the form of a sortable table. You can sort the order of appearance of the requests according to each column heading, by clicking on the appropriate heading.



Parent requests (for example, changes) can be expanded to display all the child requests (for example, tasks). To expand or collapse parent requests, click the **expand** button next to the request.

When you select a change request in the grid, details and analysis information for the selected change request are displayed in the Details and Analysis pane.

Note: By default, the Grid View displays data for 20 change requests. To reconfigure this number, see “Configuring User Properties for the Current User” on page 88.

To view change requests in the Grid view:

Click **Grid** in the change requests pane of the Change Analysis Module.

Grid View Columns

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

- **Summary.** Displays a brief overview of the change request. The icon next to the overview sentence indicates the type of change request, for example **change** or **task**.

Note: You can configure the names of the change request types to reflect the terminology used in your integrated service desk application. For example, if you are working with Mercury Service Desk, you can configure Change Control Management to refer to parent change requests as **releases** instead of **changes**. for more information, see the *Mercury Change Control Management Configuration and Installation Guide*.

➤ **Impact Severity icon.** Displays the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the change request.

Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels:

Icon	Impact Severity level
	Critical
	High
	Medium
	Low
	Very Low
	No impact analysis available

Note: A tooltip indicating the impact severity level of the change request is visible when you hold your mouse over the severity level icon.

For more information about impact analysis and how impact severity is calculated, see “Viewing Impact Analysis Results” on page 60.

- **Collision Severity icon.**Displays the collision severity level of the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed.

  Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels:

Icon	Impact Severity level
	Critical
	Very High
	High
	Medium
	Low

---

Note: If there are no collisions with the change request, no collision severity icon is displayed.

A tooltip indicating the severity level of the collision is visible when you hold your mouse over the collision severity icon.

For more information about collisions and how collision severity is calculated, see "Viewing Change Request Collisions" on page 67.

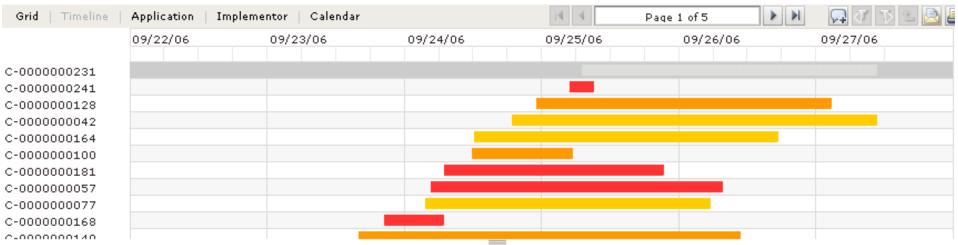
- **Comments icon.**The presence of a comment icon indicates that user comments have been posted in response to the selected change request.
- **Risk.** Displays a number from 0-100 that indicates the risk level of this change request relative to the other change requests. A higher number indicates a higher risk level.

  Change Control Management calculates this figure based on risk factors that are subjectively weighted by the Change Control Management administrator during the configuration process. For more information about how the risk level is calculated, see "Viewing Change Request Risk Analysis" on page 78.
- **Request ID.** Displays the reference ID number of the change request in the service desk application.
- **Start.** Displays the date on which the change request is scheduled to begin.
- **Priority.** Displays 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.
- **Status.** Displays the Change Control Management status of the change request. 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 request.

Note: You can customize the Grid view to display different information. For more details, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

Viewing Change Requests on a Timeline

The Timeline view in the Change Analysis module, displays change requests as blocks of time on a timeline. Each change request is displayed on a separate row. The Timeline view resembles a typical Gantt chart, allowing you to view overlapping change requests.



When you hold your mouse over a change request block, a tooltip displays detailed information about the change request. When you select a change request block, details and analysis information for the selected change request are displayed in the Details and Analysis pane.

The color of the block indicates the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the change request.

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

- Red – Critical
- Orange – High
- Yellow – Medium
- Khaki – Low

- Olive Green – Very Low
- Gray – No impact analysis available

Note: For more information about impact analysis and how impact severity is calculated, see "Viewing Impact Analysis Results" on page 60.

The Timeline view is synchronized with the Grid view—the order of appearance of change requests and the amount of change requests per page is the same for both views.

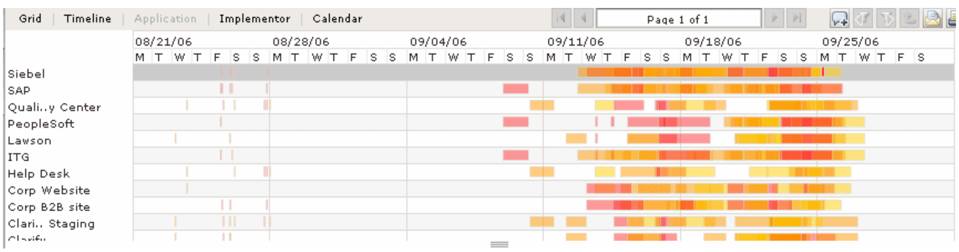
To view change requests in the Timeline view:

Click **Timeline** in the change requests pane of the Change Analysis Module.

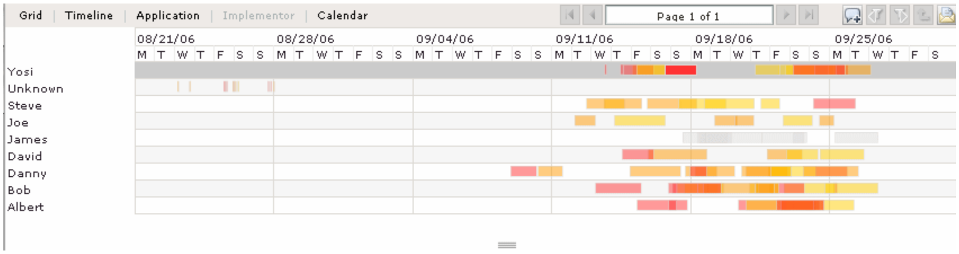
Viewing Change Requests from Different Perspectives

The perspective views in the Change Analysis module, display change requests aggregated by groups, allowing you to view change requests from different perspectives. The following perspective views are available in the Change Analysis module:

- **Application view.** Aggregated by affected application. Change requests are displayed as blocks of time on a timeline and are grouped according to the affected applications. Each row is dedicated to the change requests for a single application.



➤ **Implementor view.** Aggregated by implementor. Change requests are displayed as blocks of time on a timeline and are grouped according to the implementor. Each row is dedicated to the change requests for a single implementor.



Understanding the Application View and the Implementor View

The Application view and the Implementor view share the same layout. Their common layout is described in this section.

When you hold your mouse over a change request block, a tooltip displays detailed information about the change request. The color of the block indicates the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the change request.

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

➤ Red – Critical

➤ Orange – High

➤ Yellow – Medium

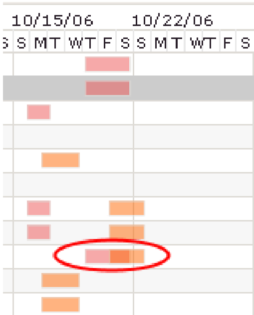
➤ Khaki – Low

➤ Olive Green – Very Low

➤ Gray – No impact analysis available

Note: For more information about impact analysis and how impact severity is calculated, see “Viewing Impact Analysis Results” on page 60.

Change requests that overlap are indicated by a darker shade of color at the point where they overlap. The circled change requests in the following example overlap:



When you select a change request block, details and analysis information for the selected change request are displayed in the Details and Analysis pane.

In certain circumstances, a particular change request may be completely concealed by other overlapping change requests, and you will therefore be unable to select that change in this view. The idea of the perspective views, is to provide an overall picture of the change requests. To view each change request individually, it is recommended to switch to either Grid, Timeline or Calendar view.

Note: The Application and Implementor views display only the applications/implementors that are included in the selected filter.

To view change requests in the Application view:

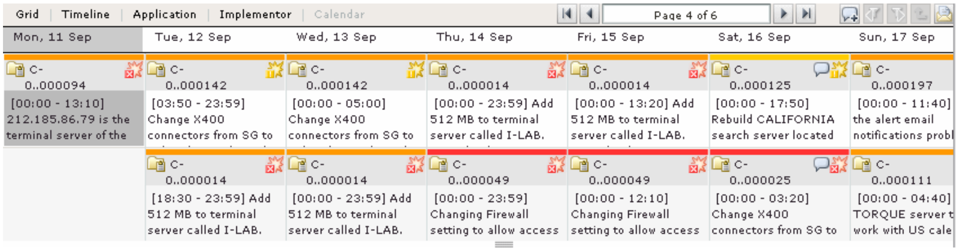
Click **Application** in the change requests pane of the Change Analysis Module.

To view change requests in the Implementor view:

Click **Implementor** in the change requests pane of the Change Analysis Module.

Viewing Change Requests in a Calendar

The Calendar view in the Change Analysis module, displays the change requests planned for each calendar day. A single page displays one calendar week. Each column represents a calendar day and each cell represents a single change request. Change requests appear in ascending order according to their scheduled start times.



A colored stripe in the cell heading indicates the impact severity level of the change request. The severity level for the change request is determined by the highest severity level of the configuration items affected by the change request.

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

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

Note: For more information about impact analysis and how impact severity is calculated, see "Viewing Impact Analysis Results" on page 60.

- The collision severity icon in the cell heading indicates the collision severity level for the change request. If the change request collides with more than one other change request, the severity level for the worst collision is displayed.

Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels:

Icon	Impact Severity level
	Critical
	Very High
	High
	Medium
	Low

---

Note: If there are no collisions with the change request, no collision severity icon is displayed.

For more information about collisions and how collision severity is calculated, see “Viewing Change Request Collisions” on page 67.

The presence of a comment icon in the cell heading indicates that user comments have been posted in response to the selected change request.

Note: Change requests with no start or end times or with start times later than their end times, will not appear in the Calendar view.

The Calender view displays up to one hundred changes per calendar day. When a filter returns more than one hundred change requests per day, the Calendar view will display only the first hundred. To view all the change requests, either refine the filter or switch to either the Grid or Timeline views.

Filtering Change Requests

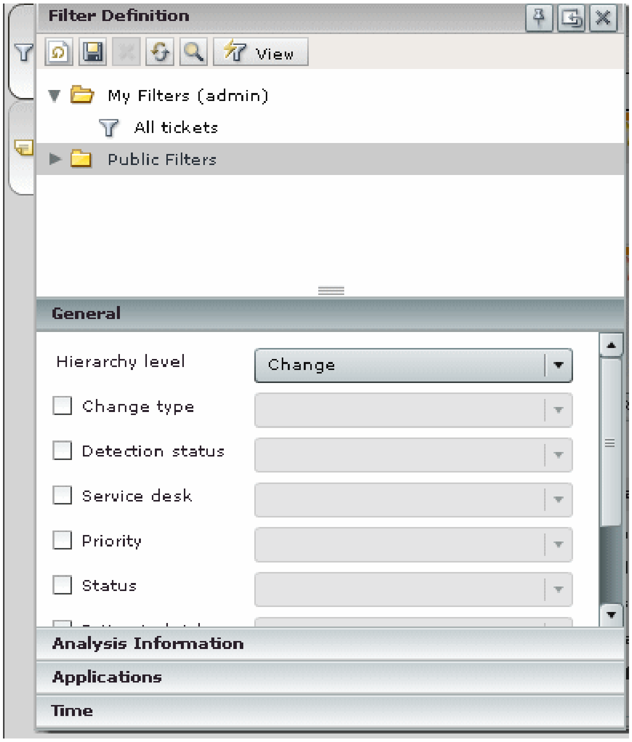
This section describes how to filter change requests displayed in the Change Analysis module and includes the following topics:

Understanding the Filter Definition Pane

You use the Filter Definition pane to filter the change requests in the Change Analysis module.

To open the Filter Definition pane:

Click the **Filters** button located near the top left corner of the Change Analysis module.



The Filter Definition pane includes the following sections:

➤ **Filter toolbar.** Contains commands for performing various actions on the filters. For more information, see “Working with the Filter toolbar” on page 47.

➤ **Saved Filters.** Displays the list of saved filters. Individually created filters appear under **My Filters**. Public filters created by an Administrator, appear under **Public Filters**.To expand or collapse the filter lists, click the **expand** button.

➤ **Filter Criteria.** Contains all the filter criteria divided into four categories: General, Analysis Information, Applications, and Time. For more information, see “Filter Criteria,” below.

Setting Filter Definitions

You set filter definitions in the Filter Definition pane. You can view change requests that meet certain criteria and you can save filters for future use.

Note: When a filter is in place, it filters the change requests in all of the different views in the Change Request pane.

To set filter definitions:

1 Click the **Filters** button to the left of the Change Requests pane to open the Filter Definition pane.
2 Select one or more of the filter criteria described in the section “Filter Criteria” on page 48.
   a Click the relevant filter category (**General**, **Analysis Information**, **Applications**, or **Time**) to view the filter criteria in that category.
   b Select the relevant filter criteria.

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

Next Step: At this point you can either save the filter or view the results of the filter without saving it.

➤ To save the filter, continue with step 3.

➤ To view the results, continue with step 4.

---

3 Save the filter.

   a Click the **Save** button in the Filter Definition Pane.

   b In the Save Filter dialog box, enter a name for the new filter you are creating.

   c 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.

   d 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.

4 View filter results.

   a Select a saved filter from **My Filters** or **Public Filters**, or set new filter definitions.

   b Click the **View Filtered Change Requests** button in the Filter toolbar.

   The change requests that meet the criteria of the selected filter are displayed in the Change Requests pane.

Note: You can navigate between previously viewed filters and return to the current filter using the **Back** and **Forward** Filter buttons in the Change Analysis toolbar.

Working with the Filter toolbar

The Filter toolbar in the Filter Definitions pane contains the following buttons:

Button	Name	Description
	**Save** (Modify)	Used to save filter definitions or modify a saved filter. • For information about saving filter definitions, see “Setting Filter Definitions” on page 45 • To modify a saved filter, select the relevant filter in the Filter Definition pane and edit the filter properties as required. Click the **Save** button and then click **OK** in the Save Filter dialog box to save the new filter properties.
	**Delete**	Used to delete a saved filter • To delete a saved filter in the Filter Definition pane, select the filter you want to delete, click the **Delete** button, and click **Yes** to confirm the deletion of the filter.
	**Refresh List**	Used to refresh the list of filters displayed in the Filter Definition pane: • To refresh the list of filters in the Filter Definition pane, click the **Refresh List** button. The lists of filters under both **My Filters** and **Public Filters** are updated.
	**Find**	Used to search for a specific change request: • To search for a change request, click the **Find** button in the Filter Definition pane, select or enter the ID number of the change request you want to locate, and click the **Find** button. The request is displayed in the Change Requests pane. • 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.

Button	Name	Description
	**Pin Sidebar**	Displays the Change Requests pane to the right of the Filter Definition pane. • 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. (See below)
	**Restore Sidebar**	Restores Filter Definition pane to its original size.

Filter Criteria

Note: Change Control Management applies all defined criteria to a filter. For example, if you defined a filter with **Priority** set to **High** and **Impact Severity** set to **Critical**, you will only see change requests that meet both these criteria (**Priority: High** and **Impact Severity level: Critical**).

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

You filter change requests according to different criteria. These criteria are divided into the following four filter categories.

- General
- Analysis Information
- Applications
- Time

General

The following table describes the filter criteria that appear in the **General** category, in the Filter Definition pane.

Filter by:	Description
Hierarchy	View change requests displayed according to a specific hierarchy structure. Select one of the following hierarchy structures: • **Changes** • **Tasks** • **Changes and Standalone Tasks** • **All (Flat View).** Displays all changes and tasks, including tasks that are part of a parent change, on one level and not as a hierarchy.
Change Type	Regular Latent
Detection Status	Undetected Detected
Service Desk	View change requests originating from specific service desk applications. You can select one or more of the listed service desk application.
Priority	View change requests that have specific priority levels. You can select one or more of the listed priority levels. The priority levels are determined in the service desk application.
Status	View change requests that have specific statuses. You can select one or more of the listed statuses. The status is determined in the service desk application.
Estimated risk	View change requests that have specific estimated risks. You can select one or more of the listed risk levels. The estimated risk is determined in the service desk application.

Filter by:	Description
Contact Person	View change requests according to contact people. 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.)
Implementor	View change requests according to implementors. Enter a string that matches the name of an implementor, or use an asterisk (*) to match a string to several implementors. (For example, if you use the string Da*, both David and Danny will match.)

Analysis Information

The following table describes the filter criteria that appear in the **Analysis Information** category, in the Filter Definition pane.

Filter by:	Description
Impact Severity	View change requests that have specific impact severity levels. You can select one or more of the listed impact severity levels. Impact severity is calculated by Change Control Management. For more information about impact severity, see "Viewing Impact Analysis Results" on page 60. Note: You cannot filter by impact severity level if you selected **Requests with unknown impact** in the **Applications** category.
Risk Analysis	View change requests with risk analysis levels that fall within a specified range. The risk analysis level is a number from 1-100 that indicates the risk level of this change request relative to the other change requests. A higher number indicates a higher risk level. Specify a range by entering a number between 1-100 in the boxes provided or by moving the pointers with your mouse. For more information about how the risk level is calculated, see "Viewing Change Request Risk Analysis" on page 78.

Filter by:	Description
Collision Severity	View change requests that have specific collision severity levels. You can select one or more of the listed collision severity levels. Collision severity is calculated by Change Control Management. For more information about collision severity, see "Viewing Change Request Collisions" on page 67.
Collision Type	View change requests of specific collision types. You can select one or more of the listed collision types. For more information about collision types, see "Viewing Change Request Collisions" on page 67.
Comments	View change requests according to user voting categories. Users can express their opinion about a change request by casting a vote (Agree, Disagree, To CAB) using the Comments feature. You can select one or more of the listed voting categories. For more information about casting a vote and using the comments feature, see "Viewing Change Request Comments" on page 76.

Applications

You can view change requests that affect specific application by selecting one of the following options in the **Applications** category, in the Filter Definition pane.

- All requests
- Requests with unknown impact
- Requests affecting any application
- Requests affecting my application
- Requests affecting selected applications

To choose selected applications by which you want to filter change requests:

1. In the **Applications** category of the Filter definition pane, select **Requests affecting selected applications**.

2 Select the relevant applications in the **Available Applications** list and click the right pointing arrow to move the applications to the **Selected Applications** list.

3 To deselect applications, select the applications in the **Selected Applications** list and click the left pointing arrow to move them back to the **Available Applications** list.

Note: You can select multiple applications by holding the CTRL key down while you select the applications.

Time

The filter criteria in the **Time** category of the Filter Definition pane, allow you to view change requests that meet certain criteria during a specified time frame.

The following table describes the filter criteria that appear in the **Time** category, in the Filter Definition pane.

Filter by:	Description
Planned (Start, End)	View change requests whose planned execution started and/or ended during a specified time frame.
Actual (Start, End)	View change requests whose actual execution started and/or ended during a specified time frame.
Operations (Created, Updated)	View change requests that were created and/or updated during a specified time frame.
Comments (Created)	View change requests that had comments added to them during a specified time frame.

To select filter criteria in the Time category:

1. In the **Time** category of the Filter definition pane, select one or more of the filter criteria. For example you could select **End** in the **Planned** section, and **Updated** in the **Created** section.
2. From the box next to the filter criteria that you selected, choose **Before, After, Between, Yesterday, Last Week, Last Month, Today, This Week, This Month, Tomorrow, Next Week,** or **Next Month**.

3. If you selected **Before, After,** or **Between**, click the **calendar** button to open the calendar box.
4. In the calendar box, select a month using the left and right arrows next to the month name, select a date from the calendar, and enter or select an exact hour in the time box. Click **OK**.

5

Viewing Change Request Details and Change Analysis Information

Change Control Management presents details and change analysis information for each change request. This information is displayed across different tabs in the Change Analysis Module. This chapter explains the information presented in these tabs.

Viewing Change Request Overviews

The Overview tab provides a general overview of the information pertaining to the selected change request. This tab displays summaries of the change request information received from the service desk application, the analysis information performed by Change Control Management, and the user comments and opinions concerning the change request.

The information in the Overview tab is divided into the following three sections:

- General Information
- Analysis Information
- User Information

General Information

The General Information section in the Overview tab displays a summary of the change request information received from the service desk application and includes the following data:

- **Service Desk.** The service desk application from which the change request originated – A link is provided to the Request Details tab, in which more details about the original change request, originating from the service desk application, are displayed.
- **Scheduled for.** The scheduled start time of the change request – A link is provided to the Request Details tab, in which the planned and actual (where relevant) start and end times of the change request's execution are displayed.
- **Duration.** The scheduled duration of the change request – A link is provided to the Request Details tab, in which more information about the change request's duration is displayed.
- **Status.** The status of the change request as defined in the service desk application.

Analysis Information

The Analysis Information section in the Overview tab displays a summary of the change analysis performed by Change Control Management for each change request and includes the following data:

- **Impact severity.** Displays the impact severity level of the change request as represented by the impact severity icon. A tooltip indicating the impact severity level of the change request is visible when you hold your mouse over the icon. The icon serves as a link to the Impact Analysis tab.

  For more information about impact analysis and how impact severity is calculated, see "Viewing Impact Analysis Results" on page 60.

- **Collisions.** Displays the collision severity level of the change request as represented by the collision severity icon. If the change request collides with more than one other change request, the severity level for the worst collision is displayed. A tooltip indicating the severity level of the collision is visible when you hold your mouse over the icon. The icon serves as a link to the Collisions tab.

  For more information about collisions and how collision severity is calculated, see "Viewing Change Request Collisions" on page 67.

- **Risk analysis.** Displays a number from 0-100 that indicates the risk level of this change request relative to the other change requests. A higher number indicates a higher risk level. The displayed number serves as a link to the Risk tab.

  For more information about the Risk tab and how the risk level is calculated, see "Viewing Change Request Risk Analysis" on page 78.

  Changed CIs. Displays the number of CIs that were changed as a direct result of the change request. The displayed number serves as a link to the Impact Analysis tab. For more information about impact analysis, see "Viewing Impact Analysis Results" on page 60.

  Affected applications. Displays the number of applications that were affected as a result of the change request. The displayed number serves as a link to the Impact Analysis tab. For more information about impact analysis, see "Viewing Impact Analysis Results" on page 60.

User Information

The User Information section in the Overview tab displays following information:

- **Comments.** The number of comments posted by users in response to the selected change request.
- **Disagreed.** The number of users who posted the vote **Disagree** in response to the change request.
- **To CAB.** The number of users who posted the vote **To CAB** in response to the change request.
- **Agreed.** The number of users who posted the vote **Agree** in response to the change request.

Note: The comment and voting data link to the Comments tab. For more information about the Comments tab, see “Viewing Change Request Comments” on page 76.

- **Notified.** The number of users who received notification of the change request – A link is provided to the Notifications tab, in which the names of the users who received notifications of the change request and the dates on which they received the notifications are displayed. For more information about the Notifications tab, see “Viewing User Notifications” on page 63

Viewing Change Request Details

The Request Details tab displays the change request details that originate from the service desk application and some key analysis data processed by Change Control Management.

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.
Contact location	The geographic location of the person 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.
Estimated risk	The estimated risk level that was assigned to the change request by a user.
Created	The 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 request is scheduled to begin.
Planned end	The time recorded in the request at which the execution of the change request is scheduled to end.
Request ID	The reference ID number of the change request in the service desk application.
Impact severity	The Change Control Management-calculated impact severity level of the change request. For more details, about impact severity, see "Viewing Impact Analysis Results" on page 60.
Last impact analysis	The time at which an impact analysis was last calculated.
Risk Analysis	Displays a number from 0-100, calculated by Change Control Management, that indicates the risk level of this change request relative to the other change requests. For more information about the Risk tab and how the risk level is calculated, see "Viewing Change Request Risk Analysis" on page 78.

Field	Description
Implementor	The person responsible for implementing the change request.
Last updated	The time at which the change request was last updated in the service desk application.
Actual start	The time at which execution of the change request actually began.
Actual end	The time at which execution of the change request actually ended.
Description	A description of the change request, 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 Impact Analysis tab displays the applications and configuration items (CIs) that will be affected by the change request. This includes information about the affected applications or CIs and an indication of the severity of the impact on each application or CI (for example: critical or low).

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 request, Change Control Management displays the following from left to right:

➤ a list of the applications affected by the change request

- a hierarchy of CIs associated with each application that were either changed or affected by the change request
- details of each displayed CI in the CI hierarchy

Note: CIs that are affected by a change request, 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 request, Change Control Management displays the following from left to right:

- a hierarchy of CIs that were either changed or affected by the change request
- 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."

Although the correlation of each impact severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following impact severity levels:

Icon	Impact Severity level
	Critical
	High
	Medium

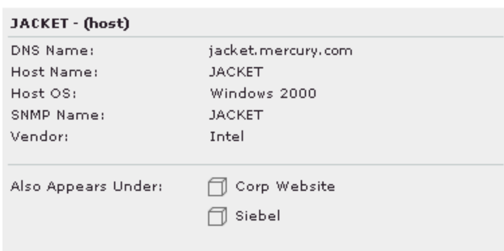
Icon	**Impact Severity level**
	Low
	Very Low
	No impact analysis available

If a CI was changed as a result of the change request, 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 request. **ACI** indicates that the CI was affected by the modification of the change request.

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 89.

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.



Viewing User Notifications

In the Change Control Management configuration settings, users can be associated (by themselves or by an administrator) with specific applications so that they can receive notifications about the changes affecting these applications.

The User Notifications tab displays the notifications that were triggered for the selected change request. This includes the date and time of each notification, the user who received the notification, and an icon indicating whether the user viewed the notification.

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

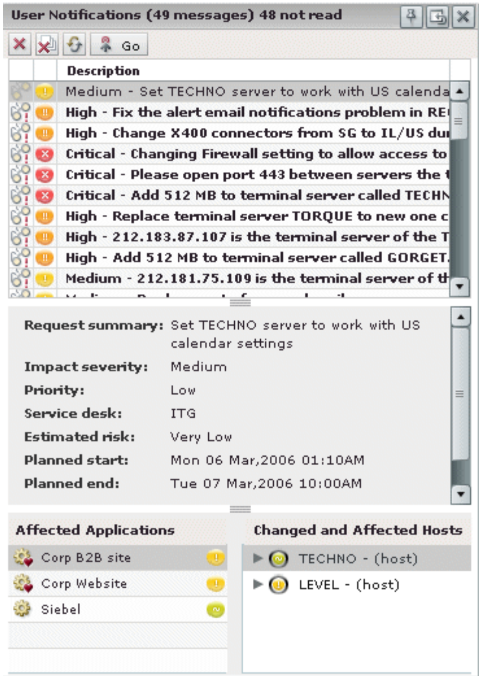
- for the current user, in the User Notifications pane
- for each change request, in the Notifications tab

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 89.)

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.  If the notification has been viewed, the **Read** icon is displayed.  If the notification has not been viewed, the **Not Read** icon is displayed
 **Impact Severity icon**	Displays the Change Control Management-calculated severity level for the change request whose impact analysis triggered the notification. For more details about impact severity, see "Viewing Impact Analysis Results" on page 60.
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 more details about impact severity, see "Viewing Impact Analysis Results" on page 60.
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.

Entity	Description
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.
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 60.
Changed and Affected Hosts	Displays a hierarchy of CIs associated with each application that were either changed or affected 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 60.

➤ 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 request in the change request's Notifications tab.

To view the notifications triggered for a specific change request:

Select the change request 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. For example, if the notification for a specific user is marked as unread and a significant amount of time has passed since that user received notification, you may want to send the user an e-mail of the request summary as a reminder.

Viewing Change Request Collisions

Change Control Management automatically identifies change requests involving common key elements, which are scheduled to take place over the same or adjacent time periods. This section includes the following topics:

- "Understanding Collisions" on page 68
- "Working with the Collisions Tab" on page 70

- "Performing a Customized Collision Calculation" on page 74

Understanding Collisions

Change requests are defined as colliding when:

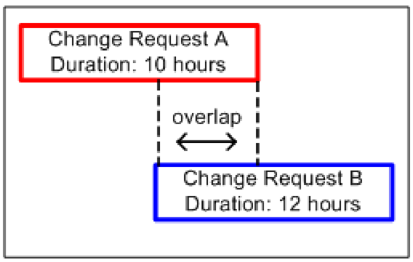
- The same implementor is responsible for implementing more than one change over the same or adjacent time periods.
- An application or configuration item (CI) is involved in more than one change over the same or adjacent time periods.

Change Control Management measures collisions in terms of their proximity level and the cause of the collision.

Proximity level

The Proximity level of two change requests can be defined as either **Overlap** or **Overlap Warning**:

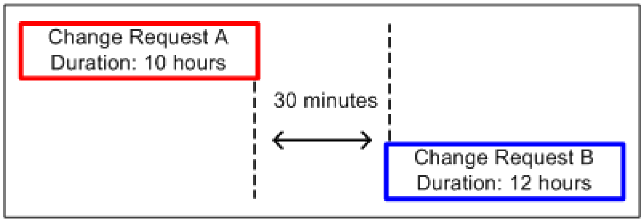
- **Overlap.** The two change requests have overlapping schedules.



- **Overlap Warning.** In reality, planned changes often exceed their original planned duration, which can result in an unforeseen overlap between two change request schedules. In certain cases, if two change requests are scheduled in close proximity to one another, their proximity level is defined as **Overlap Warning**.

  Change requests are considered to be within close proximity of one another when the time gap between the first and second change requests is shorter than 10% of the duration of the first change request.

  An example of Overlap Warning between Change Request A and Change Request B is illustrated below, where the gap between the two change requests is 30 minutes, which is less than 10% of the duration of **Change Request A** (10 hours).



Cause of the Collision

If two change requests overlap, there is not necessarily a collision between them. They could be taking place at the same time without having any effect on one another. Change Control Management only defines change requests as colliding if they share one of the following elements:

- **Configuration Item (CI).** Two change requests involve at least one common CI.

  If a CI is changed as a direct result of a change request it is referred to as a Changed CI (CCI). If a CI is not directly involved in the change request but may be affected as a result, it is referred to as an Affected CI (ACI).

  Assume for example that a change request involves increasing the memory on Server A. In this case, Server A is referred to as a CCI. If Host Machine B is connected to Server A but is not directly involved in the change request, it is referred to as an ACI.

- **Application.** Two change requests affect at least one common application.
- **Implementor.** The same implementor is responsible for implementing both change requests.

Collision Severity Level

Change Control Management determines a collision severity level for each collision based on the cause of the collision and the proximity level of the change requests. The following table describes how Change Control Management determines the collision severity based on different combinations of causes and proximity levels:

	Proximity Level	
Cause	**Overlap**	**Overlap Warning**
CCI-CCI	Critical	High
CCI-ACI	Very High	Medium
ACI-ACI	High	Low
Application	High	Low
Implementor	High	Low

For example, change requests which share an **ACI** (Affected CI) in common and whose proximity level is defined as **Overlap** would have a **Medium** collision severity level.

If there is more than one cause for a collision, the collision severity level is determined by the cause with the highest severity.

Working with the Collisions Tab

You view all the change requests that collide with the selected change request in the Collisions tab of the Change Analysis module.

By default, collisions are calculated automatically for the scheduled change requests. However, you can also perform a manual collision calculation, enabling you to view the collisions that would occur if the selected change request was moved to a different timeframe. For more information, see “Performing a Customized Collision Calculation” on page 74

Within the Collisions tab, you can choose to view the collisions in Grid view or in Timeline view.

Grid View

In Grid View, change requests that collide with the selected change request are displayed in a table that is sorted in order of collision severity level. The Grid view table includes the following columns:

- **Collision Severity icon.** Displays the collision severity level of the colliding change request. If there is more than one cause for a collision, the collision severity level is determined by the most severe cause.

  Although the correlation of each severity level with a color-coded icon is configurable, by default the following color-coded icons (which also include symbols) indicate the following severity levels:

Icon	Impact Severity level
	Critical
	Very High
	High
	Medium
	Low

  A tooltip indicating the severity level of the collision is visible when you hold your mouse over the collision severity icon. For more information about how collision severity is determined, see “Collision Severity Level” on page 70.

- **Proximity level icon.** Indicates proximity level of the colliding change requests. The following icons represent the different proximity levels:

Icon	Proximity level
	Overlap
	Overlap Warning

A tooltip indicating the proximity level of the collision is visible when you hold your mouse over the collision severity icon. For more information about proximity level, see "Proximity level" on page 68

- **Summary.** A brief overview of the conflicting change request.
- **Request ID.** The reference ID number of the conflicting change request in the service desk application.
- **Implementor.** The name of the implementor responsible for implementing the conflicting change request.
- **Start.** The date at which the execution of the conflicting change request is scheduled to begin. A tooltip indicating the scheduled start time and date is visible when you hold your mouse over the start date.
- **End.** The date at which the execution of the conflicting change request is scheduled to end. A tooltip indicating the scheduled time and date is visible when you hold your mouse over the end date.
- **Causes.** The causes of the collision. Change requests collisions can be caused by more than one factor. If there are multiple causes for the collision, all the collision causes are listed. The following table describes the possible collision causes:

Cause	Description
CCI-CCI	A common CI is changed by both change requests.
CCI-ACI	A common CI is changed by one of the change requests and indirectly affected by the other change request
ACI-ACI	A common CI is indirectly affected by both change requests.
Application	A common application is indirectly affected by both change requests.
Implementor	A common implementor is responsible for implementing both change requests

For more information about collision causes, see "Cause of the Collision" on page 69.

Timeline View

In Timeline view, change requests that collide with the selected change request are displayed as blocks of time on a timeline where each line represents a separate colliding change request. The change request selected in the Change Requests pane is always displayed first in the timeline as a point of reference and is labeled **reference**. The colliding change requests are labeled by their Request ID number.

The color of the block indicates the collision severity level of the colliding change request. If there is more than one cause for a collision, the collision severity level is determined by the most severe cause.

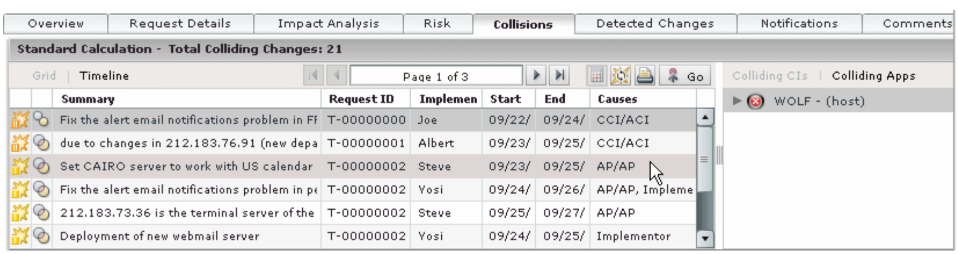
By default, the following colors indicate the following collision severity levels:

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

A tooltip displaying detailed information about the colliding change request is visible when you hold your mouse over the change request block.

Viewing More Information About Colliding Change Requests

When you select a change request in either Grid or Timeline view, the colliding CIs and/or applications are described in more details (where relevant) in the right pane of the Collisions tab.



To view the list of affected applications involved in a collision, select a colliding change request and click **Colliding Apps** in the Description pane.

Affected application are listed alongside an icon indicating whether the application is defined as the user's application. A tooltip displaying information about whether the application is defined as the user's or not is visible when you hold your mouse over the application name.

To view the hierarchy of configuration items that are involved in a collision, select a colliding change request and click **Colliding CIs** in the Description pane.

You can click the expand arrow to view the full hierarchy of CIs. Involved CIs are listed alongside an icon indicating the impact severity level of the CI. For more information about impact severity, see “Viewing Impact Analysis Results” on page 60. A tooltip displaying more information about the colliding CI is visible when you hold your mouse over the CI name.

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 in the description pane and click the **CI Attributes** button.

To view a conflicting change request in the Change Requests pane, select the request and click the **Go to Colliding Request** button in the Collisions tab.

To print details of a colliding change request, select the relevant colliding change request in the Collisions tab, click the **Print Preview** button in the Collisions tab and then click **Print** in the change request summary dialog box that opens.

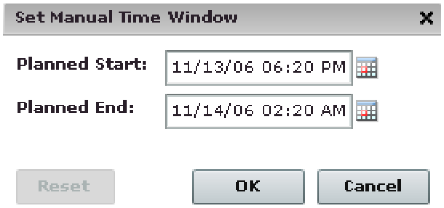
Performing a Customized Collision Calculation

In certain situations you may want to reschedule a change request to a new timeframe. Before you actually reschedule the change request you can check whether collisions will occur during different timeframes and you can look for a timeframe that will involve minimal collisions. You do this by performing a customized collision calculation.

To perform a customized collision calculation:

1. Select the relevant change request in the Change Requests pane.

2 In the **Collisions** tab, click the **Customized Mode** button. If you have not yet set a timeframe during this session for your calculation, the Set Manual Time Window dialog box opens automatically.



If you already set a timeframe during this for the calculation and you want to change it, click the **Set Collision Timeframe** button in the **Collisions** tab to open the Set Manual Time Window dialog box.

Note: You can reset the start and end times of the change request to their original settings, by clicking Reset in the Set Manual Time Window dialog box.

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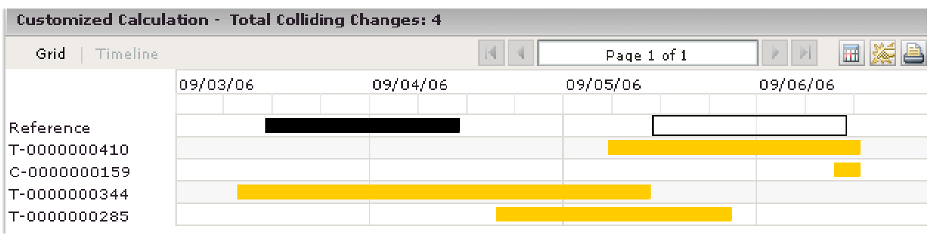
3 Select the start and end times for the timeframe you want to evaluate in the **Start Time** and **End Time** boxes and click **OK**.

4 The Collisions tab displays the change requests that collide with the selected change request during the new timeframe.

In the Collisions tab **Timeline view,** the original request is represented by a black bar in the reference row, while the customized collision timeframe is represented by an outlined white bar.



5 To return to the default mode where collisions are calculated automatically for the scheduled change requests, click the **Automatic Collision Mode** button in the **Collisions** tab.

Viewing Change Request Comments

Users can post their comments about change requests and express their opinion about the change request by casting a vote (Agree, Disagree, To CAB). These comments and a summary of the votes pertaining to the selected change request are displayed in the Comments tab.

Using this comments feature, users can conduct online discussions about a change request prior to the CAB actually meeting to discuss it. As a result, the CAB discussion can begin at a more advanced stage or may not be necessary at all if it is clear from the user responses whether or not the change request should be approved.

For selected change requests that include user comments, you view the comments and a summary of the votes pertaining to that change request in the **Comments** tab.

The Comments tab is divided into the following two sections:

- **Request Comments pane.** Displays the details of each comment including the subject and text of the comment, the date and time when the comment was posted, the user who entered the comment, and an icon representing the most recent vote posted by the user for this change.
- **Voting Summary tree.** Displays a summary of the most recent votes posted by users for this change request. Each available voting option is displayed (Disagree, Agree, To CAB, and No Vote) with the number of users who voted for that option displayed in parentheses.

Note: Only the user's most recent vote is taken into account in the **Voting Summary** tree.

Under each voting option, a list of users who voted for that option is displayed. You can expand or collapse the list of users under each voting option by clicking the arrow next to the voting option.

When you select a user in the Voting summary Tree, all the comments posted by that user are displayed in the **Request Comments** pane. To view the comments for all the users, click **All** in the **Voting Summary** Tree.

Note: Users can enter more than one comment for each change request. All user comments are displayed along with the user's most recent vote.

Adding Comments to Change Requests

You can add a comment to any change request. As part of the comment, you can express an opinion about the change by selecting one of the following voting options:

- **Disagree**
- **To CAB**
- **Agree**

You can enter more than one comment for each change request. All user comments along with the user's most recent vote are displayed in the **Comments** tab.

To add a comment to a change request:

1. Select the change request to which you want to add a comment.

2. Click the **Add Comment** button to open the Add Comment dialog box.
3. Type a subject and a message. The subject field is mandatory.
4. Select one of the voting options. If you voted on this change request at least once before, your most recent vote is displayed as **Current vote**.
5. Click **Submit** to add your comment.

Sending Change Request Comments by E-mail

You can send one or more comments by e-mail.

To send comments by e-mail:

1 In the **Request Comments** pane, select the check box next to the comments that you want to send.

2 Click the **Send E-Mail** button situated at the top right corner of the **Request Comments** pane.

3 In the Send E-Mail dialog box, enter the e-mail address of each recipient of the e-mail, enter any additional comments you have on the change request, and click the **Send** button.

Viewing Change Request Risk Analysis

Change Control Management performs risk analysis on each change request, enabling change managers to compare change requests in terms of the risks involved in their implementation. This section includes the following topics:

➤ "Understanding Risk Analysis" on page 78

➤ "Example of Risk Analysis Calculation" on page 79

➤ "Working with the Risk Tab" on page 82

Understanding Risk Analysis

For each change request, Change Control Management calculates a relative risk value using the following formula:

Calculated Risk = **Potential Damage** x **Probability of Failure**

where:

➤ **Calculated Risk** is a relative value between 0-100 where a higher number indicates a higher relative level of risk. The risk value does not reflect an objective, universal risk level. Rather, it indicates the risk level of the selected change request relative to the other change requests.

➤ **Potential Damage** represents the potential damage that may result from the requested change being implemented. Potential Damage is calculated as a weighted value between 0-10 where a higher number indicates a higher degree of damage.

➤ **Probability of Failure** represents the probability that the implementation of the change request will fail to some degree, and cause possible damage as a result. Probability of Failure is calculated as a weighted value between 0-10 where a higher number indicates a higher probability of failure.

Potential Damage and Probability of Failure are calculated based on *risk factors* that are defined by the Change Control Management administrator during the configuration process.

For example, the administrator could define a Probability of Failure risk factor called **New_technology** which reflects the amount of time that the technology involved in the change request has been used in the organization.

As part of creating a new risk factor, the administrator defines the source of the data (for example, a field in the integrated service desk application), defines mapping rules that translate the source data into factor values between 0-10, and assigns a weight to the factor.

The administrator can also define override rules for the risk calculation. For example, the administrator can define that if the change request involves a technology that is new to the organization, the risk level is automatically set at 100, regardless of the actual risk calculation.

For more information about configuring risk factors, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

Example of Risk Analysis Calculation

This section describes a detailed example of the process involved in calculating the risk value for the change requests.

During the configuration process, the Change Control Management administrator defines a risk factor called **New_technology**. This will be one of the factors used to measure Probability of Failure for every change request processed by Change Control Management.

The data source for the **New_technology** risk factor originates from a required field in the integrated service desk application, which reads as follows: **How long (in months) has the technology involved in this change been used in your organization?** Accepted values are any number between 1-36.

The administrator assigns the following mapping rules for the **New_technology** risk factor that translate the source data into factor values between 0-10:

Original data (range)	Factor score
1-12 months	10
12-24 months	5
24-36 months	0

For example, if the technology was introduced 18 months ago, the **New_technology** risk factor will receive a score of 5.

The administrator assigns a weight of 4 to the **New_technology** risk factor.

The administrator then defines three more risk factors to measure Probability of Failure. The following table summarizes the Probability of Failure risk factors defined by the administrator and their assigned weights:

Factor name	Weight
New_technology	4
QA_approval	8
Affected_CIs	6
Duration_of_change	2
	Total weight = 20

After defining the risk factors used to measure Probability of Failure for each change request, the administrator performs the same process to define a separate set of risk factors that will be used to measure Potential Damage for each change request.

Now assume that a particular change request involving a fairly new technology is processed by Change Control Management and receives the following Probability of Failure risk factor scores:

Factor name	**Factor score**
New_technology	10
QA_approval	4
Affected_CIs	2
Duration_of_change	0

Change Control Management calculates a weighted value for each factor using the following formula:

```
Weight/Total Weight x Score = Weighted Value
```

where:

Weight is the weight assigned to the risk factor during the Change Control Management configuration process.

Total Weight is the sum of all the weights assigned the risk factors.

Score is the score of the risk factor as translated from the source data. The mapping used to translate source data into a score is defined during the Change Control Management configuration process.

Substituting the values for the **New_technology** risk factor (Weight=4, total Weight=20, Factor Score=10) into this formula, you arrive at a weighted value of 2:

```
4/20 x 10 =2
```

Weighted values are calculated for all the Probability of Failure risk factors as illustrated below:

Factor name	Factor score	Weight	Weighted value
New_technology	10	4	2
QA_approval	4	8	1.6
Affected_CIs	2	6	0.6
Duration of Change	0	2	0
		Total weight=20	**Probability of Failure=4.2**

The Probability of Failure score is the sum of all the weighted values and amounts to 4.2, as illustrated in the above table.

Using the same method (with separately defined risk factors) the Potential Damage score is calculated and amounts to 5.

The final risk score, calculated using the following formula, amounts to 21:

Probability of Failure (4.2) X Potential Damage (5) = Calculated Risk (21)

As illustrated in this example, the final risk score for the change request incorporates all the risk factors which influence both the probability of failure and the potential damage of this change request.

Working with the Risk Tab

You view the risk analysis for the selected change request in the **Risk** tab of the **Change Analysis** module. The risk calculation is always displayed on the top right corner of the tab, for example:

42 (Calculated Risk) = 7 (Potential Damage) x 6 (Probability)

If an override rule is in place, the final risk level as defined by the override rule is displayed in red, next to the risk calculation.

The Risk tab also includes distribution charts of the risk factors contributing to the Potential Damage and Probability of Failure calculations. These distribution charts enable you to pinpoint the most significant factors contributing towards the risk level of the selected change request.

The Risk tab is divided into the following three views:

- **Risk Analysis view.** An overall summary of the risk analysis for the selected change request including distribution charts of the risk factors contributing to the Potential Damage and Probability of Failure calculations. If an override rule is in place, details of the override rule are displayed alongside the distribution charts.
- **Potential Damage view.** Displays a distribution chart that graphically illustrates the proportional contribution of each risk factor to the Potential Damage calculation alongside a table that describes details about each risk factor. The same distribution chart is also displayed in the Risk Analysis view.
- **Probability of Failure view.** Displays a distribution chart that graphically illustrates the proportional contribution of each risk factor to the Probability of Failure calculation alongside a table that describes details about each risk factor. The same distribution chart is also displayed in the Risk Analysis view.

The table in the Potential Damage and Probability of Failure views includes the following columns:

Column	Description
Name	The name of the risk factor defined during the Change Control Management configuration process.
Description	A description of the risk factor defined during the Change Control Management configuration process.
Data	The source data for the risk factor, for example, data from a field in the integrated service desk application
Weight	The weight assigned to the risk factor during the Change Control Management configuration process.

Column	Description
Score	The score of the risk factor as translated from the source data. The mapping used to translate source data into a score is defined during the Change Control Management configuration process.
W. value	The weighted value of the risk factor within the final Potential Damage or Probability of Failure score. The weighted value is calculated as follows: **W. value** = **Weight**/**Total Weight** x **Score** where **Weight** is the weight assigned to the risk factor and **Total Weight** is the sum of all the weights assigned the risk factors.

The Potential Damage and Probability of Failure values are calculated by adding the weighted values of all their respective risk factors. This total, reflecting either the Potential Damage or Probability of Failure value is displayed below the **W.value** column.

Viewing Detected and Latent Changes

Note: This feature may not be available in your Change Control Management application. For more information, contact your Change Control Management administrator.

Mercury Application Mapping (MAM) periodically searches for actual changes to your environment and sends data about new changes that have been detected to Change Control Management.

When a new change is detected, Change Control Management tries to match the detected change with existing change requests that were scheduled to take place during the same time according to certain criteria. These matching criteria are defined during the Change Control Management configuration process.

For example, one of the matching criteria could be that both the detected change and the change request share at least one common affected host CI.

Detected changes that match the selected change request are displayed in the Detected Changes tab. The Detected Changes tab displays information about the detected changes received from Mercury Application Mapping (MAM).

Detected changes that do not match any change request according to any of the defined criteria are displayed in the Change Requests pane along with all the other change requests. A latent change has the words **Latent change** in the change request **Description** field. In the Change Analysis module Grid view, latent changes are indicated by the **Latent** icon in the **Summary** column.

When you click on a detected change in the Change Requests pane, information about the detected changes received from Mercury Application Mapping (MAM) is displayed in the Detected Changes tab.

Note: For information about configuring criteria related to the Detected Changes feature, refer to the *Mercury Change Control Management Configuration and Installation Guide*.

6

Configuring User Settings

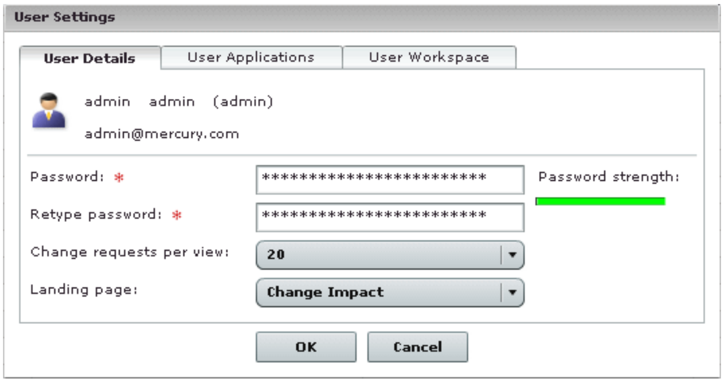
This chapter describes how to configure user properties for the current Mercury Change Control Management user, how to select the applications you want to associate with the current user, and how to save your workspace settings.

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** module. 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.

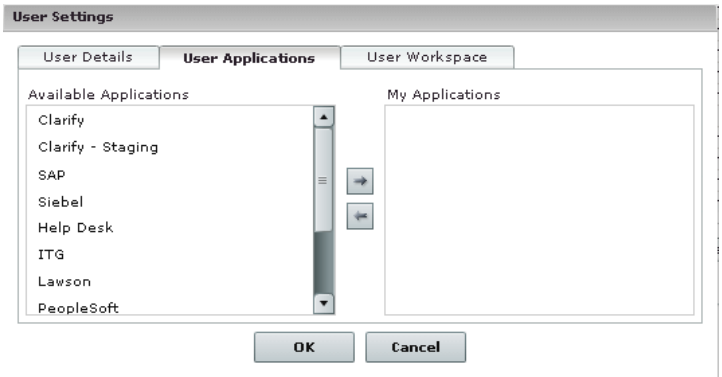
5 Click **OK** to save the modified user properties and close the User Settings dialog box.

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** module. 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.



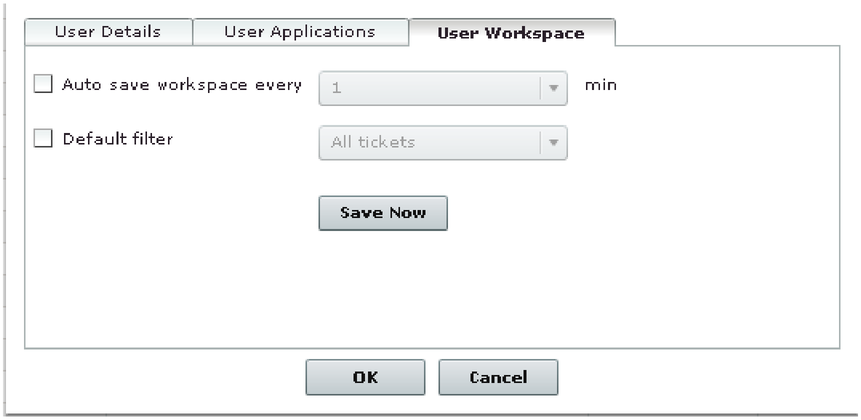
3. To associate an application with the current user, select the application in the **Available Applications** list and click the top arrow. The application appears in the **My Applications** list.

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.

Saving User Workspace Settings

Change Control Management always opens displaying the **Change Analysis** module. You can save your Change Analysis module workspace so that the next time you open the application, it will display the saved workspace.

You save your workspace settings in the **User Settings** module, in the **User Workspace** tab.



➤ To automatically save your Change Analysis workspace, select **Auto save workspace every** and select the number of minutes from the list.

➤ To save your Change Analysis workspace now, click **Save Now**.

➤ To always open Change Control Management with the same filter definitions, select **Default filter** and choose one of the saved filters from the list.

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