Mercury IT Governance Center™

Configuring the Standard Interface

Version: 6.0

MERCURY™

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Introduction

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About This Document

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

This document provides usage information about configuring the standard interface. The document contains the following chapters:

- Chapter 2, *Creating Modules,* on page 25

  This chapter details the steps required to create a new module.

- Chapter 3, *Configuring Modules,* on page 33

  This chapter provides information on how to edit an existing module.

- Chapter 4, *Distributing Modules,* on page 47

  This chapter details how to publish and distribute a module.

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- Chapter 7, *Creating Portlet Definitions,* on page 77

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- Chapter 10, *Building Portlet Data Sources*, on page 175

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- Chapter 11, *Customizing the Standard Interface*, on page 203

  This chapter provides information on how to customize the Mercury IT Governance Center standard interface. Customizing the standard interface includes changing the presentation layer and changing the menu bar.

- Chapter 12, *Configuring the Dashboard and Workbench Environments*, on page 219

  This chapter includes information about setting the system regional calendar, configuring Workbench preferences, and configuring regional settings.

- Appendix A: *Mercury-Supplied Portlets* on page 231

  This appendix lists and defines all of the Mercury-supplied portlets.

Who Should Read This Document

This document is for the following audience types:

- Application administrators
- Application developers/configurators

For More Information

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

Prerequisite Documents

Prerequisite documents for this document are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*

For More Information

For information about these documents and how to access them, see the *Guide to Documentation*.

Related Documents

Related documents for this document are:

- *Commands, Tokens, and Validations Guide and Reference*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*

For More Information

For information about these documents and how to access them, see the *Guide to Documentation*.

Overview of the Standard Interface

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

Modules

A module is one or more personalized Dashboard pages and portlets. At a minimum, a module is one portlet on one Dashboard page. Modules are created much like a Dashboard page is personalized. Dashboard pages can be named, added, and deleted. On each Dashboard page, portlets can be added, deleted, and personalized.

Once complete, a module can be published to user Dashboards, distributed to user Dashboards, made the default Dashboard for all users, and configured as a pre-configured Dashboard content for users to add to their Dashboard.

Published Dashboard pages are configured by your application administrator and published to one or more users. You cannot edit a published Dashboard page. Only the application administrator can remove or replace a published Dashboard page. Published Dashboard pages include the word Publication on the page. When a published Dashboard page is added or updated to your Dashboard, the **Page Update** icon appears on the tab.

Distributing Modules

Distributed Dashboard pages are configured by your application administrator and distributed to one or more users. You can edit a distributed Dashboard page, or even remove the page. Once the application administrator gives you a distributed Dashboard page, it’s yours. Not even your application administrator can edit or remove the page. When a distributed Dashboard page is added to your Dashboard, the **Page Update** icon appears on the tab.

Preconfigured Dashboard Pages

Preconfigured Dashboard pages are Dashboard pages you choose to add to your Dashboard. Preconfigured Dashboard pages are either provided by Mercury or configured by your application administrator. Once you add a preconfigured Dashboard page to your Dashboard, you can edit the page to met your specific requirements.

Default Dashboard

The default Dashboard page is configured by your application administrator and distributed to every Dashboard. It is the first Dashboard page you see when you log on to Mercury IT Governance Center. There is only one default Dashboard page.

Portlets

Portlets reside on Dashboard pages and display information relevant to the system. Portlets can be personalized, allowing the user to define both the information gathered and the way the gathered information is displayed. Each system comes with portlets written and supported by Mercury. In addition, application administrators and advanced users at customer sites can write their own portlets. Finally, portlets written by industry-standard portlet providers can be imported into the system.

Portlet Definitions

Portlet definitions are XML files that define the look and feel of a portlet. Portlet definitions include such information as the type of portlet, user and group access to the portlet, and filter field definitions.

Portlet Data Sources

Portlet data sources are the SQL queries used to gather the information from the database.

Builder Portlets

Builder portlets are portlets created with the Portlet Definition wizard and Portlet Data Source Builder. Builder portlets consist of a portlet definition (XML file) and a portlet data source (SQL query). Mercury-supplied builder portlets are portlets shipped with Mercury IT Governance Center. You can create your own custom builder portlets using the Portlet Definition wizard and Portlet Data Source Builder.

Java Portlets

Java portlets are portlets written in Java and imported into Mercury IT Governance Center using the Portlet Definition wizard. Java portlets consist of a portlet definition (XML file) and the Java code.

WSRP Portlets

WSRP portlets are portlets defined by a producer Web service and imported into Mercury IT Governance Center using the Portlet Definition wizard. WSRP portlets have a portlet definition (XML file) referencing the http location of the WSRP portlet.

XML Menu Files

The XML menu files dictate how the menu bar looks and operates in the standard interface. The XML menu files set the order of the menus, submenus, and menu items. The XML menu files also set licensing and access grant restrictions for the menus.

JSP Files

Java server pages files are used as the source files for all of the pages seen in the standard interface. JSP files are a server-side technology allowing developers to create Web-based applications. JSP files make use of components that are developed in the Java programming language and according to the JavaBeans specification.

Cascading Style Sheets

Cascading style sheets are standard HTML cascading style sheets (CSS files). CSS files are used to centralize the definition of fonts, point sizes, and background and foreground colors.

Presentation Layer

The presentation layer files govern the general look and feel for all pages by providing common attributes and a way to include these elements for different layout styles. Included in the presentation layer files are:

- GIF logo files
- Cascading style sheets
- JSP pages

Accessing Mercury IT Governance Center

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

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

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

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

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

For More Information

For information concerning security groups and access grants, see *Security Model Guide and Reference*.

Chapter

2

Creating Modules

In This Chapter:

Overview of Creating Modules

You can provide users access to different types of Dashboard pages. To do this, Dashboard pages are created and configured to modules. A module is one or more personalized Dashboard pages and portlets. At a minimum, a module is one portlet on one Dashboard page. Modules are created much like a Dashboard page is personalized. Dashboard pages can be named, added, and deleted. On each Dashboard page, portlets can be added, deleted, and personalized. Once completed, a module can be (see *Figure 2-1*):

- Distributed to users. When a module is distributed, the user can edit the Dashboard pages.
- Published to users. When a module is published, the user cannot edit or personalize the Dashboard pages or portlets.
- Made the default Dashboard for all users.
- Made available as pre-configured Dashboard pages for users to add to their Dashboard.

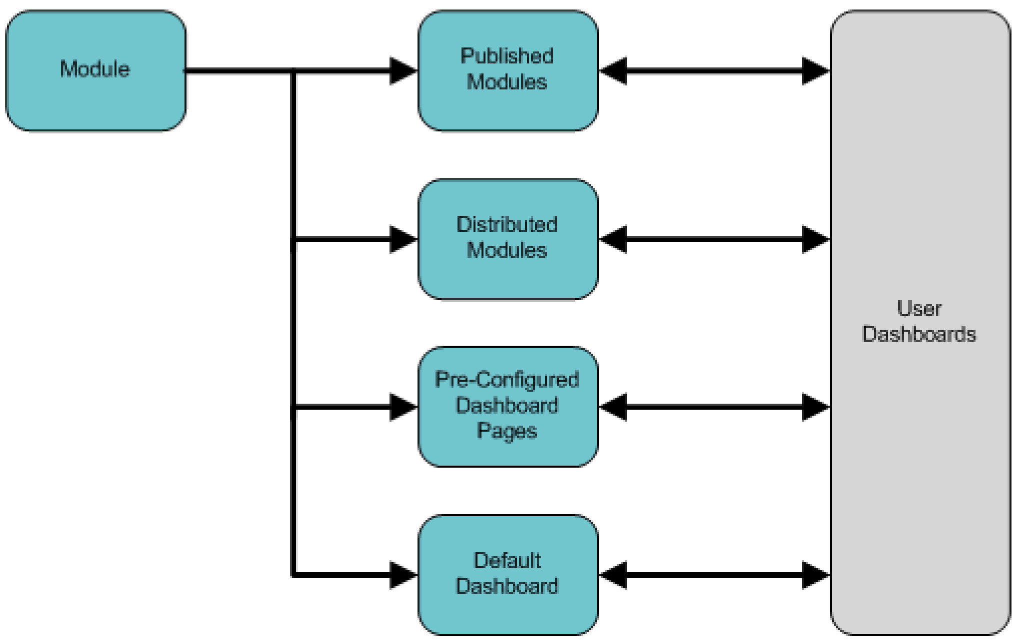


Figure 2-1. Modules and user Dashboards

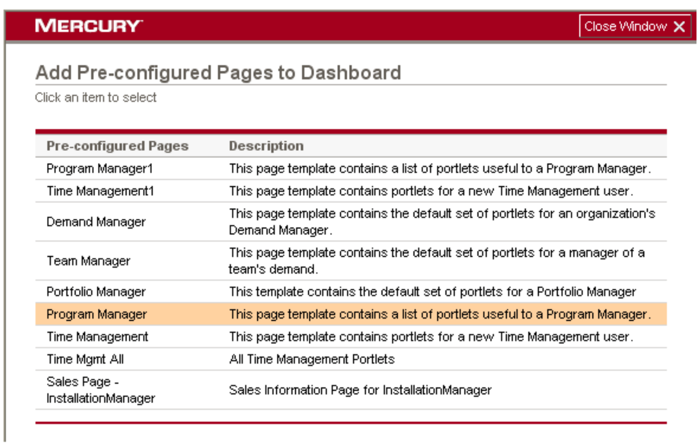
Creating Module Rules

The following list details the module creation rules:

- A module must have a unique name.
- All Dashboard pages and portlets must be part of a module.
- Only modules can be published. Dashboard pages and portlets cannot be published separately.
- Modules, Dashboard pages, and portlets can be distributed separately, but the Dashboard pages and portlets must be part of a module.

Pre-configured Dashboard Pages

Pre-configured Dashboard pages are modules that a user can add to their Dashboard. Pre-configured Dashboard pages are located on the Add Pre-configured Pages to Dashboard page (see *Figure 2-2*).



Pre-configured Pages	Description
Program Manager1	This page template contains a list of portlets useful to a Program Manager.
Time Management1	This page template contains portlets for a new Time Management user.
Demand Manager	This page template contains the default set of portlets for an organization's Demand Manager.
Team Manager	This page template contains the default set of portlets for a manager of a team's demand.
Portfolio Manager	This template contains the default set of portlets for a Portfolio Manager
Program Manager	This page template contains a list of portlets useful to a Program Manager.
Time Management	This page template contains portlets for a new Time Management user.
Time Mgmt All	All Time Management Portlets
Sales Page - InstallationManager	Sales Information Page for InstallationManager

Figure 2-2. Add Pre-configured Pages to Dashboard page

The module's name is entered in the Pre-configured Pages column and the module's description is listed in the Description column.

Modules are made available to the Add Pre-configured Pages to Dashboard page using the Configure Access section. For each module, users and user groups can be granted access to a module. Those users and user groups can then add the module to their Dashboard using the Add Pre-configured Pages to Dashboard page.

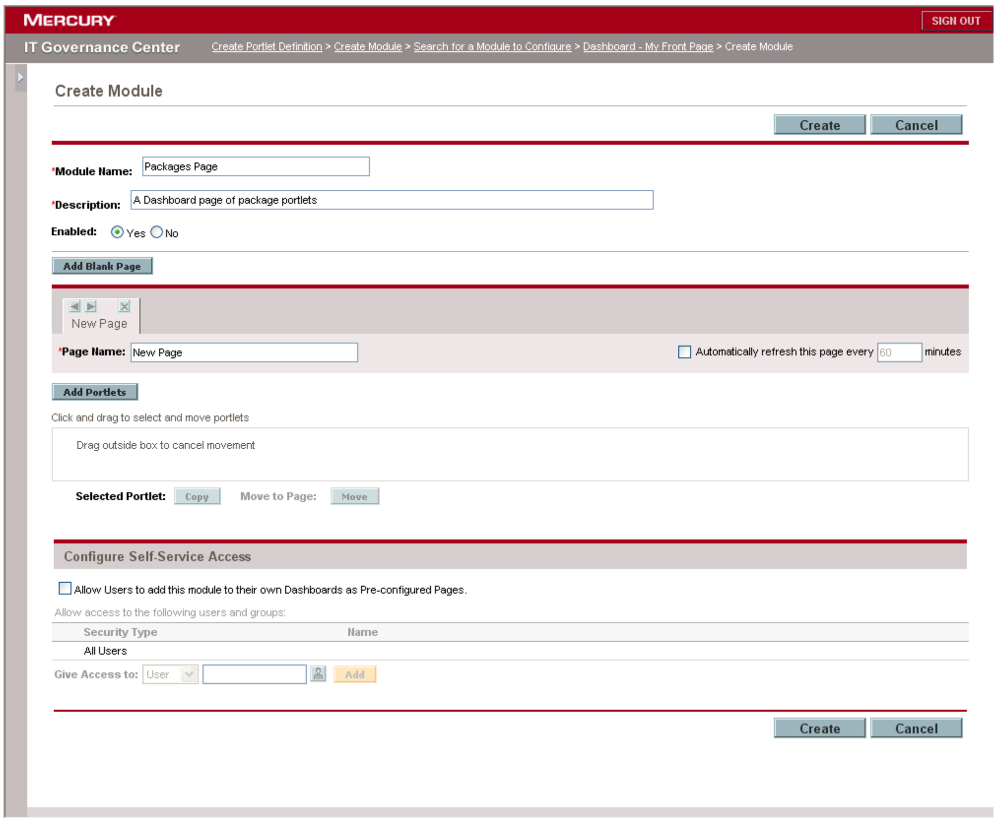
Pre-configured Dashboard pages are useful in situations where your users will be using the same basic page setup on a regular basis. Pre-configured Dashboard pages can be edited and personalized by your users.

Creating Modules

To create a new module:

1. Log on to the standard interface.
2. From the menu bar, select **Administration > Modules > Create New Module.**

   The Create Module page appears.



3. In the Module Name field, enter the name of the module.
4. In the Description field, enter a brief description.
5. Add the Dashboard pages and portlets to the module.

   The following is a list of the procedures you can perform:

   - Add and delete Dashboard pages
   - Change the order of Dashboard pages

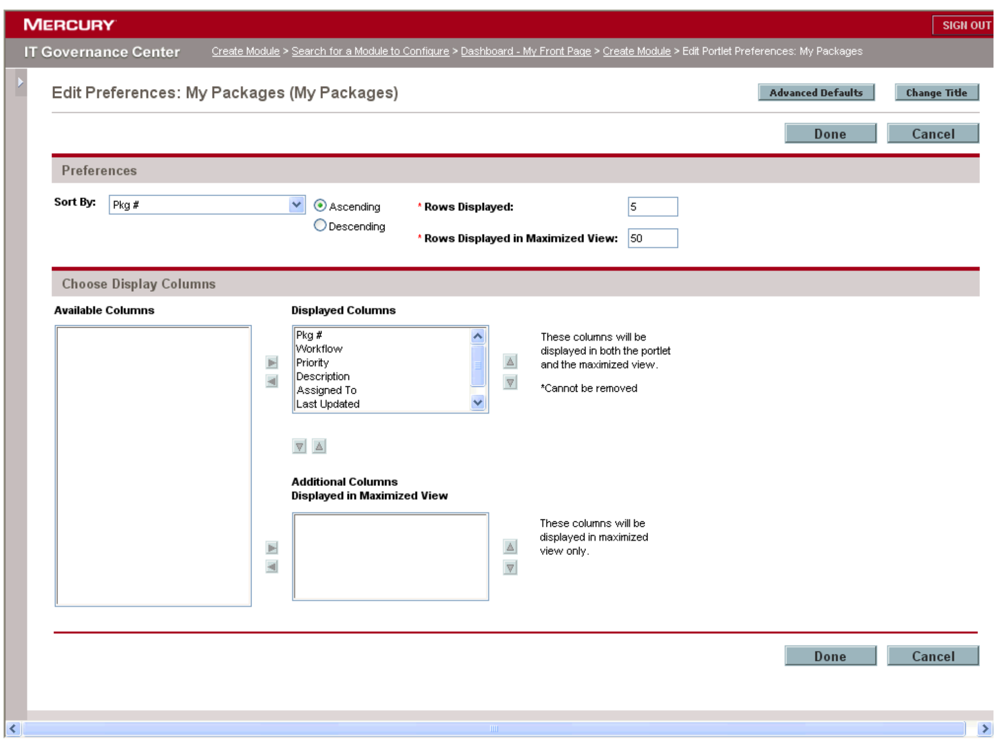
- Set the automatic refresh for a Dashboard page
- Add, delete, copy, or move a portlet on a Dashboard page
- Move a portlet to another Dashboard page
- Make a portlet narrow or wide
- Set the rows displayed on a portlet view

6. Personalize the portlets.

   Portlets can be personalized to show specific and relevant information. A portlet is customized using the portlet's edit page and advanced defaults page. To personalize a portlet:

   a. In the upper right-hand corner of the portlet, click **Edit.**

      The portlet's edit page appears.

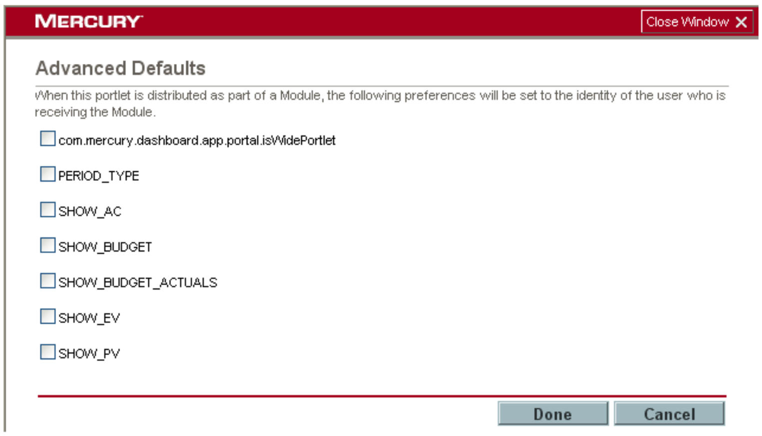


   b. In the Preferences section, enter data in the appropriate fields.

      Preference selections vary between portlets.

c. At the top of the portlet's edit page, click **Advanced Defaults.**

The Advanced Defaults page appears. The Advanced Defaults page sets some preference fields to be evaluated dynamically when using one of the Advanced Defaults fields. For example, the user property User ID is assigned as a default value to the field Assigned To. When the portlet is viewed, the data assigned to the logged in user is viewed.



d. At the bottom of the Advanced Defaults page, click **Done.**

The portlet's edit page appears.

e. At the top or bottom of the portlet's edit page, click **Done.**

The changes to the portlet are saved.

7. Configure the module's access.

To allow a user or group to add the module to their Dashboard as pre-configured pages:

a. In the Configure Self-Service Access section, select Allow users to add this module to their own Dashboards as Pre-configured Pages.

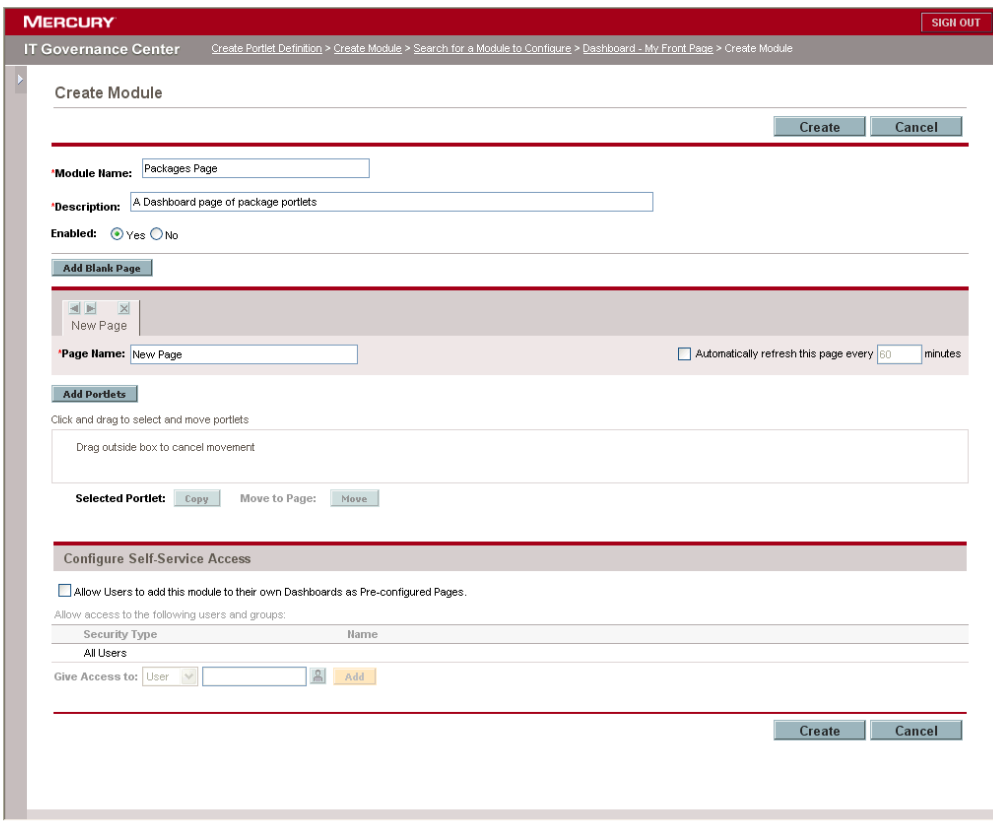
b. In the Configure Self-Service Access section, in the Give Access to field, select User or Group from the drop-down list.

- **User.** Specific users are given access to add the portlet to their Dashboard page. Selecting this value enables the next field to be a drop-down list displaying all of the users having the license.

- **Group.** Specific groups are given access to add the portlet to their Dashboard page. Selecting this value enables the next field to be a drop-down list displaying all of the groups having the license selected.

c. In the Configure Self-Service Access section, next to the drop-down list, select a resource.

d. In the Configure Self-Service Access section, click **Add.**



8. At the top or bottom of the Create Module page, click **Create.**

The module is created and a confirmation page appears. Click **Cancel** to stop the module creation process.

9. Check the confirmation page to verify the module was created.

For More Information

For more information concerning how to add the Dashboard pages and portlets for the module, see the *Getting Started* guide.

Chapter

3

Configuring Modules

In This Chapter:

Overview of Configuring Modules

This section provides an overview of module configuration. Once a module is created, it can then be configured using the Configure Modules page. From the Configure Modules page, you can:

- Add or delete Dashboard pages and portlets from modules
- Set the user access to modules
- Copy and delete modules
- View the module's usage
- Remove published modules from Dashboards

Before opening the Configure Modules page, you must search for and select a module to configure (see *Figure 3-1*).

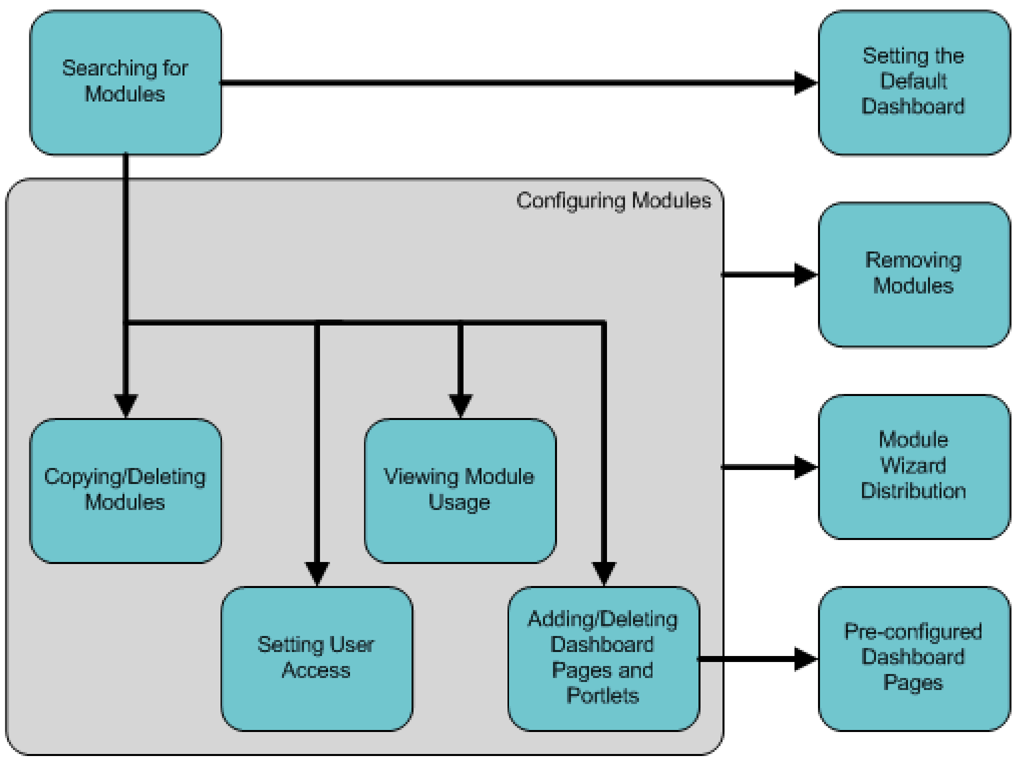


Figure 3-1. Configuring modules

Configuring Modules Rules

The following list details the module creation rules:

- A module must have a unique name.
- All Dashboard pages and portlets must be part of a module.
- Modules that are currently published cannot be deleted.
- Modules can be published. Dashboard pages and portlets cannot be published individually.
- Modules, Dashboard pages, and portlets can be distributed individually.

Preconfigured Dashboard Pages

Preconfigured Dashboard pages are modules you can added to your Dashboard. Preconfigured Dashboard pages are located on the Add Preconfigured Pages to Dashboard page (see *Figure 3-2*).

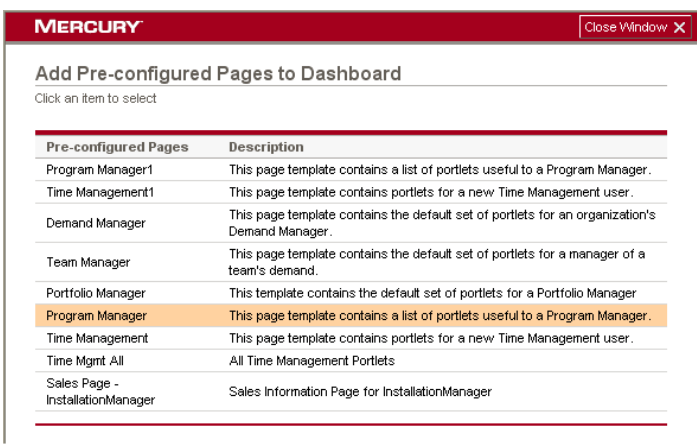


Figure 3-2. Add Pre-configured Pages to Dashboard page

The module's name is entered in the Content column and the module's description are listed in the Description column.

Modules are made available to the Add Pre-configured Pages to Dashboard page using the Configure Self-Service Access section of the Configure Modules page. For each module, users and user groups are allowed access to a module. Those users and user groups can then add the module to their Dashboard using the Add Pre-configured Pages to Dashboard page.

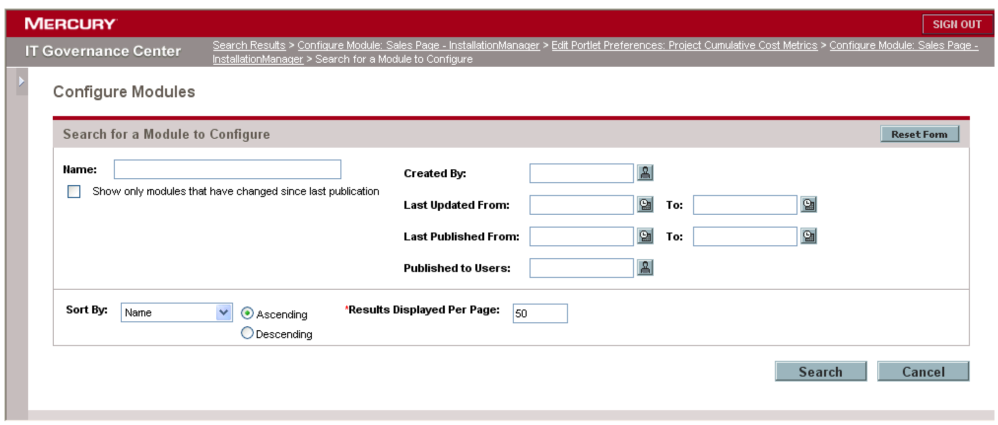
Pre-configured Dashboard pages are useful in situations where your users will be using the same basic page setup on a regular basis. Pre-configured Dashboard pages can be edited and personalized by your users.

Searching for Modules

To search for an existing module:

1. From the standard interface, on the menu bar, select **Administration > Modules > Configure Modules.**

   The Search for a Module to Configure section of the Configure Modules page appears.



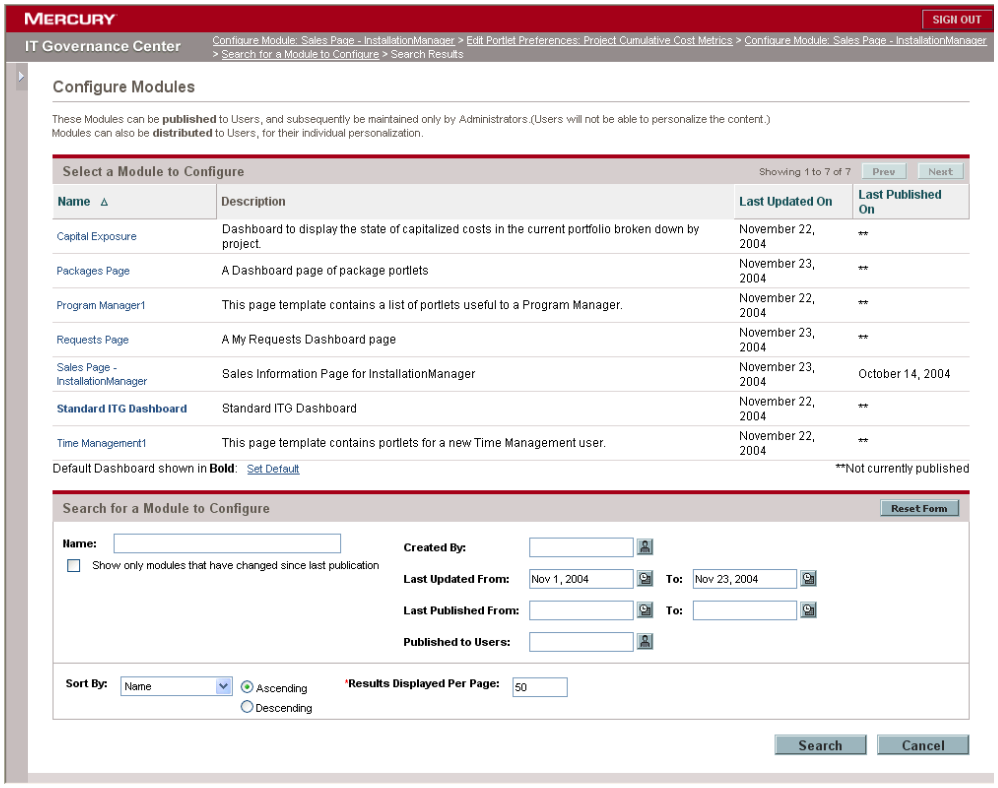
2. In the Search for a Module to Configure section, enter the search criteria as described in the following table.

Field	Description
Reset Form	Click this button to clear all of the fields and reset the defaults in the Search for a Module to Configure section.
Name	Type all or part of a module's name. Typing a partial name will yield all matching results.
Show only modules that have changed since last publication	This checkbox sets the search to find modules changed since they were last published.

Field	Description
Created By	The name of the user who created the module. A single-select auto-complete field.
Last Updated From... To	The date the Module was last updated. Allows for a range of dates. Click on the **Date Time Finder** icon to select the date and time.
Last Published From... To	The date the module was last published. Allows for a range of dates. Click on the **Date Time Finder** icon to select the date and time.
Published to Users	Enter the names of users who have the published module. A multi-select auto-complete list.
Sort By	Enter the name of a column to sort the results. A drop-down list displaying the columns: Name, Last Updated On, and Last Published On.
Ascending/Descending	Selects the sort order as ascending or descending. The default is ascending.
Results Displayed Per Page	The number of search results to display on every page. The default is 50.

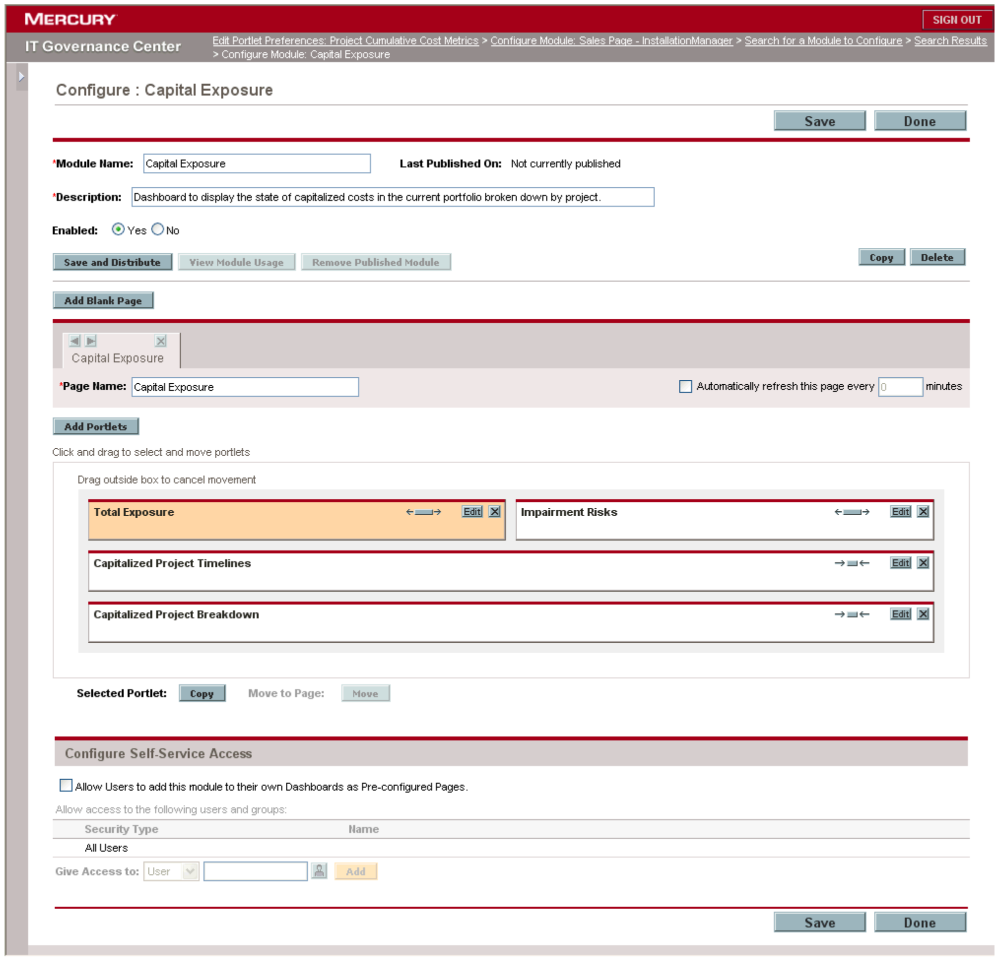
3. At the bottom of the Configure Modules page, click **Search.**

   The results are displayed in the Select a Module to Configure section. See the previous table for a list of fields and buttons in the Select a Module to Configure section. The **Prev** and **Next** buttons move the returned value list backwards and forwards.



4. In the Select a Module to Configure section, in the Name section, select the module to configure.

   The Configure <*Module Name*> page appears. Edit the Search for a Module to Configure page to refine your search. Click **Reset Form** to start a new search with new search criteria. Click **Set Default** to open the Set Default Dashboard page.


MERCURY
SIGN OUT
IT Governance Center
Edit Portlet Preferences: Project Cumulative Cost Metrics > Configure Module: Sales Page - InstallationManager > Search for a Module to Configure > Search Results > Configure Module: Capital Exposure
Configure : Capital Exposure
Save
Done
*Module Name: Capital Exposure
Last Published On: Not currently published
*Description: Dashboard to display the state of capitalized costs in the current portfolio broken down by project.
Enabled: Yes No
Save and Distribute
View Module Usage
Remove Published Module
Copy
Delete
Add Blank Page
Capital Exposure
*Page Name: Capital Exposure
Automatically refresh this page every 0 minutes
Add Portlets
Click and drag to select and move portlets
Drag outside box to cancel movement
Total Exposure
Edit
Impairment Risks
Edit
Capitalized Project Timelines
Edit
Capitalized Project Breakdown
Edit
Selected Portlet:
Copy
Move to Page:
Move
Configure Self-Service Access
Allow Users to add this module to their own Dashboards as Pre-configured Pages.
Allow access to the following users and groups:
Security Type
Name
All Users
Give Access to: User
Add
Save
Done

Configuring Modules

This section details the procedures available from the Configure Module page. *Figure 3-3* shows the Configure Module page.

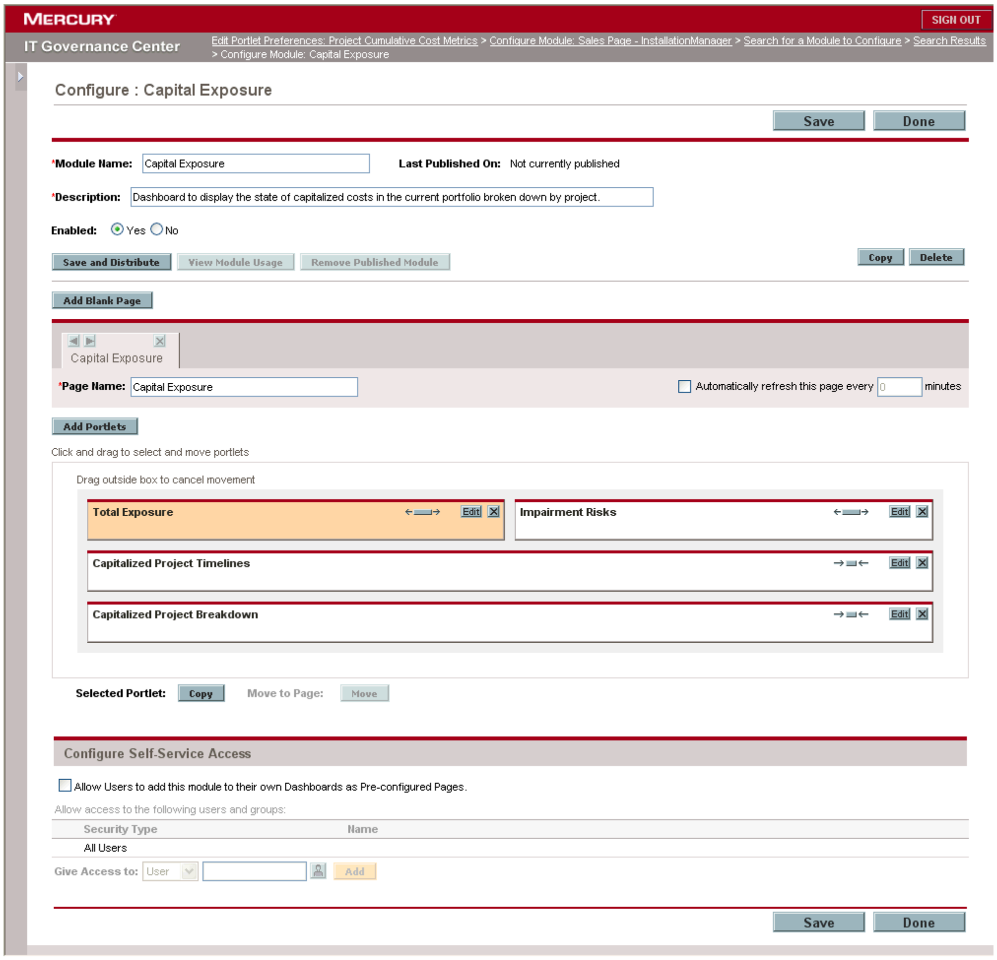


Figure 3-3. Configure Module page

Editing Modules

To edit a module:

1. From the standard interface, on the menu bar, select **Administration > Modules > Configure Modules.**

   The Search for a Module to Configure section of the Configure Modules page appears.

2. Select a module.

   The Configure <*Module Name*> page appears.

3. From the Configure <*Module Name*> page, you can do the following:

   - Add and delete Dashboard pages
   - Change the order of Dashboard pages
   - Set the automatic refresh for a Dashboard page
   - Add, delete, copy, or move a portlet on a Dashboard page
   - Move a portlet to another Dashboard page
   - Make a portlet narrow or wide
   - Set the rows displayed on a portlet view
   - Personalize the portlets
   - Configure access to the module

4. At the top or bottom of the Configure <*Module Name*> page, click **Done.**

   Click **Save** to save the changes made to the module. The Configure <*Module Name*> page stays open. Click **Cancel** to stop the configuration of the module. Click **Save and Distribute** to save the changes made to the module and load the module in the Distribute a Module page.

For More Information

For more information concerning the fields of the Configure Modules page, see *Creating Modules* on page 25. For more information concerning pre-configured Dashboard pages, see *Preconfigured Dashboard Pages*.

Viewing Module Usage

This section details how to view a module's usage. You cannot view a module's usage if the module has not been published. If the select module has not been published, the **View Module Usage** button is disabled.

To view a module's usage:

1. From the standard interface, on the menu bar, select **Administration > Modules > Configure Modules.**

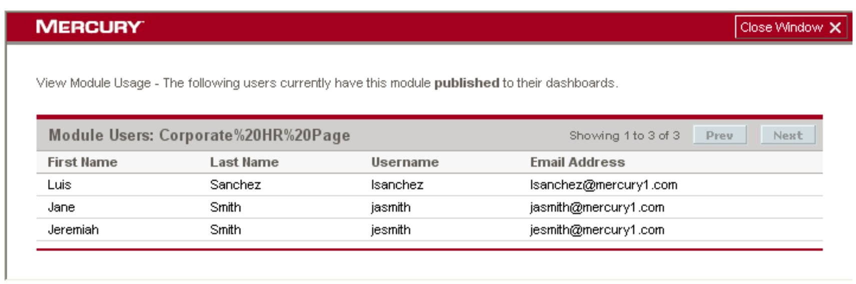
   The Search for a Module to Configure section of the Configure Modules page appears.

2. Select a module.

   The Configure <*Module Name*> page appears.

3. Near the top of the Configure <*Module Name*> page, click **View Module Usage.**

   The View Module Usage page appears. The View Module Usage page lists the users who currently have the module published to their Dashboards. Use the **Prev** and **Next** buttons to move forwards and backwards on the View Module Usage page.



Removing Published Modules

This section details how to remove a published module. You can remove a published module from a user; however, you cannot remove a module that has not been published. If the selected module has not been published, the **Remove Published Module** button is disable.

To remove published modules:

1. From the standard interface, on the menu bar, select **Administration > Modules > Configure Modules.**

   The Search for a Module to Configure section of the Configure Modules page appears.

2. Select a module.

   The Configure <*Module Name*> page appears.

3. Near the top of the Configure <*Module Name*> page, click **Remove Published Module.**

   The Remove Published Module page appears. The module populating the Configure Module page populates the Remove Published Module page.

4. Complete the steps required for the Remove Published Module page.

For More Information

For more information on how to complete the steps required for the Remove Published Module page, see *Removing Modules* on page 65.

Copying Modules

To copy an existing module:

1. From the standard interface, on the menu bar, select **Administration > Modules > Configure Modules.**

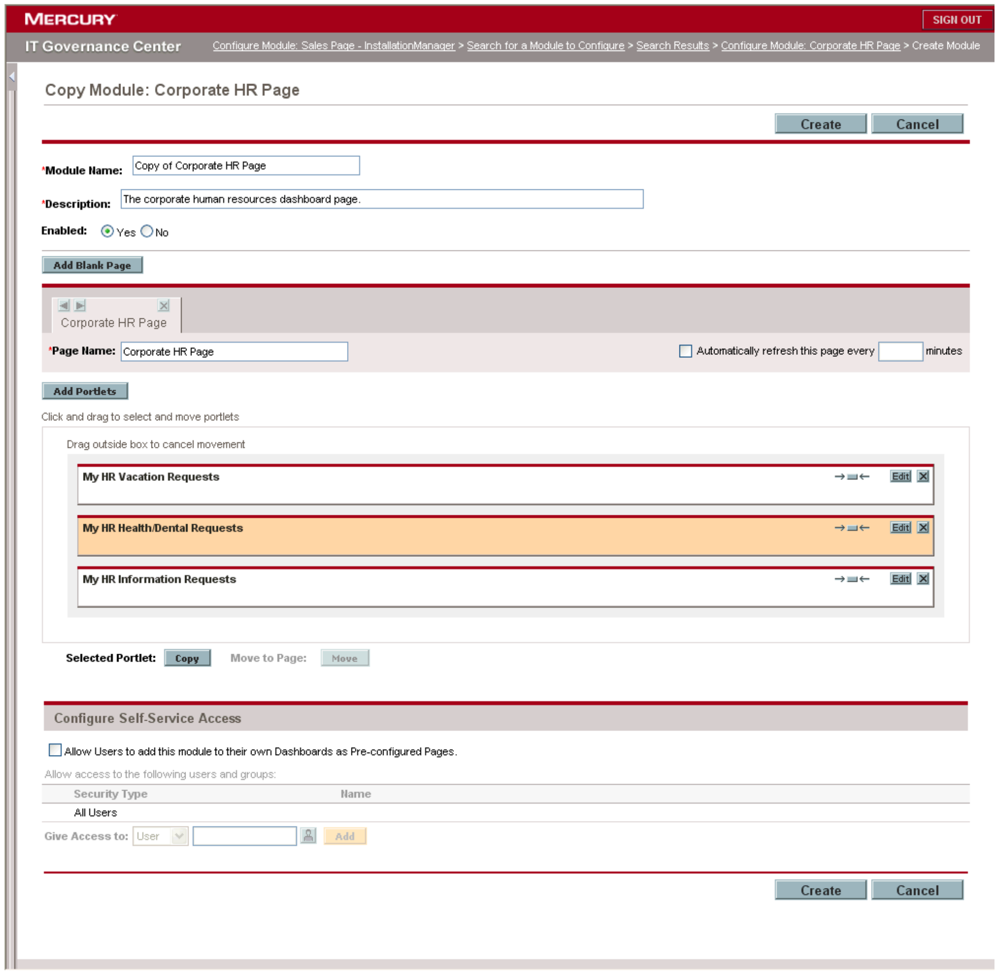
   The Search for a Module to Configure section of the Configure Modules page appears.

2. Select a module.

   The Configure <*Module Name*> page appears.

3. Near the top of the Configure <*Module Name*> page, click **Copy.**

   The module is copied. The Copy Module page appears. Copy of is added to the front of the name of the module.



4. In the Module Name field, type a new name for the module.
5. In the Description field, type a new description for the module.
6. Configure the module as required.
7. At the top or bottom of the Copy Module page, click **Create.**

   The module is created. A create module confirmation page appears.

For More Information

For more information, concerning the fields of the Copy Module page, see *Creating Modules* on page 25.

Deleting Modules

This section provides instructions on deleting an existing module. Modules that are currently published cannot be deleted. If a module is currently published, the **Delete** button is disabled.

To delete an existing Module:

1. From the standard interface, on the menu bar, select **Administration > Modules > Configure Modules.**

   The Search for a Module to Configure section of the Configure Modules page appears.

2. Select a module.

   The Configure <*Module Name*> page appears.

3. Near the top of the Configure <*Module Name*> page, click **Delete.**

   A delete confirmation pop-up page appears.

4. On the confirmation pop-up page, click **OK.**

   On the confirmation pop-up page, click **Cancel** to stop the delete module process.

Chapter

4

Distributing Modules

In This Chapter:

Overview of Publishing Modules

Publishing is a process of disseminating modules to one or more user Dashboards at one time. Published modules are tracked by the system. Only application administrators can remove a module's Dashboard pages from a user's Dashboard. Only application administrators can publish a module. The Dashboard pages and portlets of a published module cannot be edited or removed by the owner of the Dashboard.

Publishing modules requires using the Module Distribution wizard. Once open, the Module Distribution wizard takes you through the process of publishing modules.

The following steps are required to publish a module:

- **Step One: Set up Content.** Choose the module to be published and set the distribution process to publishing.
- **Step Two: Choose Users.** Choose the recipients of the module. Users can be chosen individually, by groups, by organizational units, or by those users already having a published module. An email can be configured to accompany the module publication.
- **Step Three: Preview Publication.** Review the module, recipients, and email before initiating the module's publication.

Publishing Rules for Modules

The following list details the publishing rules for modules:

- Modules can be published. Individual Dashboard pages and portlets cannot be published.
- The Dashboard pages and portlets of a published module cannot be edited or removed by the owner of the Dashboard.
- Published modules are tracked by the system.
- Published modules are removed by the application administrator.
- A published module is overwritten by an updated version of the published module.
- End users cannot personalize portlets or Dashboard pages of published modules.

Publishing Modules

This section provides the step-by-step instructions on how to publish a module.

Opening the Module Distribution Wizard

Publishing modules requires opening the Module Distribution wizard.

To open the Module Distribution wizard:

1. Log on to the standard interface.
2. From the menu bar, select **Administration > Modules > Module Distribution.**

   The Module Distribution page appears the Setup Content page. For more information concerning the Setup Content page, see *Step One: Set Up Content*.

Step One: Set Up Content

The Setup Content page contains one section, Select Content and Distribution Method. *Figure 4-1* shows the Setup Content page.

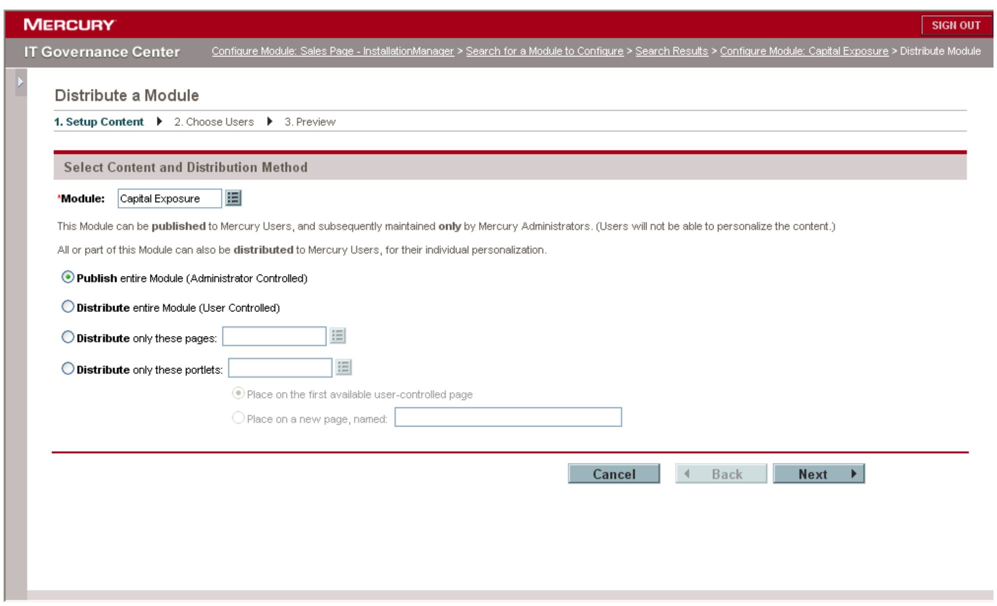


Figure 4-1. Setup Content page

To set up content:

1. In the Select Content and Distribution Method section, in the Module field, enter the name of the module being published.

   Click the auto-complete icon to open the list of available modules. Only one module can be selected.

2. Select Publish entire Module (Administrator controlled).

3. Click **Next.**

   The Choose Users page appears. For more information concerning the Choose Users page, see the next section, *Step Two: Choose Users*.

Step Two: Choose Users

The Choose Users page contains two sections:

- Select Recipients of Publication
- Notify User of Publication

Figure 4-2 shows the Choose Users page.

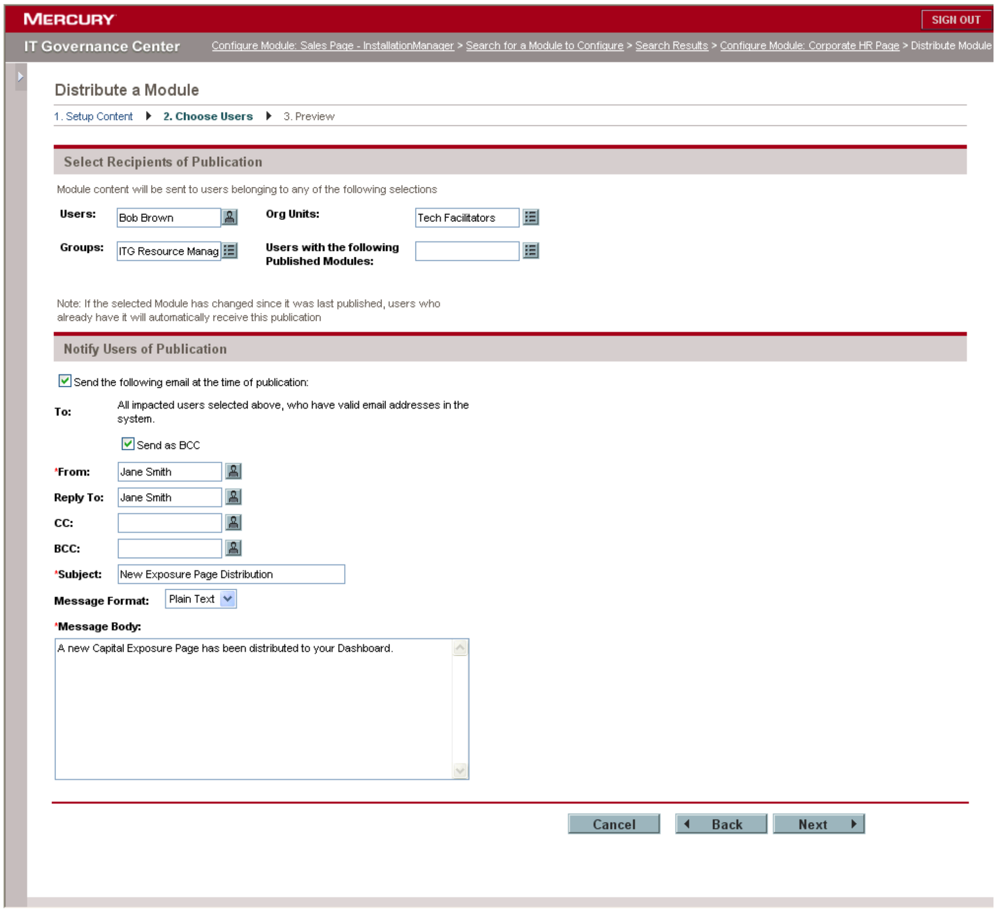


Figure 4-2. Choose Users page

To choose users:

1. In the Select Recipients of Publication section, select the users and groups receiving the module.

   Click the icons next to the Select Recipients of Publication fields. Select one or more users or groups for any of the fields. Multiple entries from multiple fields are allowed. At least one entry in one field is required. Users selected multiple times receive only one published module.

Field	Definition
Users	Specify the user or users. A multi-select auto-complete field.
Groups	Specify the group or groups. All users belonging to the specified groups receive the published module. A multi-select auto-complete field.
Org Units	Specify the organization unit or units. All users belonging to the specified organizational units receive the published module. A multi-select auto-complete field.
Users with the following Published Modules	Specify the published module or modules. All users currently having the specified modules receive the published module. A multi-select auto-complete field.

2. In the Notify Users of Publication section, complete the fields.

   The following table lists the fields and definitions of the Notify Users of Publication section. At the bottom of the Notify Users of Publication section, in the text area, enter the contents of the email message.

Field	Definition
Send the following email message at the time of publication	By default, all recipients of the publication are sent the email. Selecting this option enables the remaining fields under the Notify User of Publication heading. The To field is automatically filled with the impacted users selected under the Select Recipients of Publication heading.
To	The To field is automatically filled with the impacted users selected under the Select Recipients of Publication heading.
Send as BCC	This option insures each user only sees their own email address. Deselect this field if the impacted users are to see the entire distribution list. The default is selected.
From	Specify the email address shown in the From field. The default is the current username. If the current user does not have an email address, the field is empty.
Reply To	Specify the email address shown in the Reply To field. The default is the current username. If the current user does not have an email address, the field is empty.

Field	Definition
CC	Specify the email address shown in the CC field. This field is for notification purposes only.
BCC	Specify the email address shown in the BCC field. This field is for notification purposes only. The entire To email address list is included.
Subject	Specify the title or subject of the email.
Message Format	Selects the format of the message. A drop-down menu displays Plain Text and HTML.

3. At the top of bottom of the Choose User page, click **Next.**

   The Preview page appears. For more information concerning the Preview page, see the next section, *Step Three: Preview Publication*.

Step Three: Preview Publication

The Preview page consists of the following sections:

- Publication Content
- Impacted Users
- Email Notification

The Publication Content section lists the module or modules, Dashboard pages, and the portlets being published. The Impacted Users section lists all users receiving the published module. The Email Notification section displays how the accompanying email is configured.

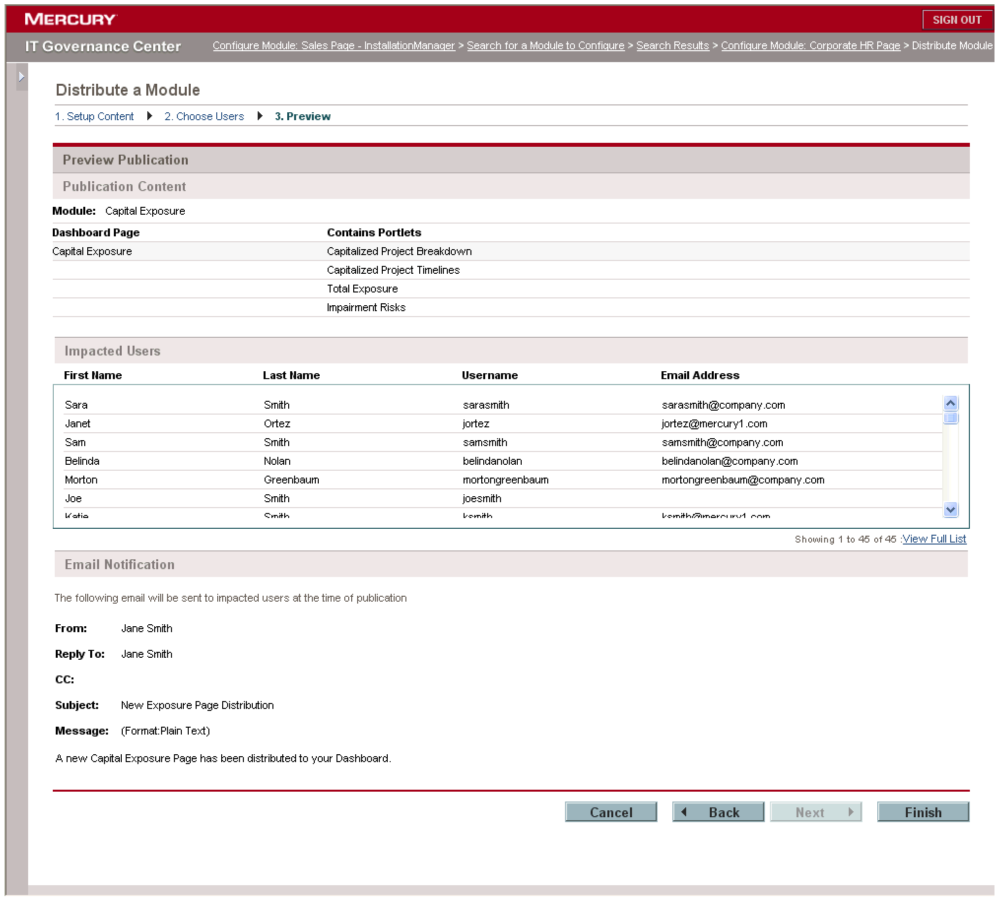


Figure 4-3. Preview page

To preview the published module:

1. In the Publication Content section, verify the module is complete.

   Make sure the module or modules being published include the correct Dashboard pages or portlets.

2. In the Impacted Users section, verify that all of the users are listed.

   Scroll through the list of users to make sure all of the users are listed. To view the complete list of users, click **View Full List.** The All Impacted Users page appears. To close the All Impacted Users page, click **Close Window.**

3. In the Email Notification section, verify the email is configured and worded correctly.

4. Click **Finish.**

   The module or modules are published. The Preview page is closed. A publication initiated page appears. For more information concerning the publication initiated page, see the next section, *Verifying a Successful Publication*.

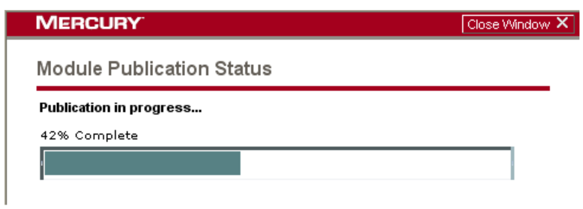
Verifying a Successful Publication

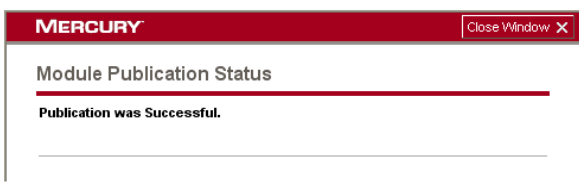
Once a module is published, a publication initiation page is opened in a separate window. From the publication initiation page, you can view the status of the publication or return to the Setup Content page to publish another module.

To view the publication status:

1. On the publication initiation page, select View Publication Status.

   The Module Publication Status page appears. A status bar represents the completed portion of the publication.





   Once the publication is complete, a final status message is displayed. The final status message states if the publication was a success, or displays a list of the users not receiving the module.

   - If the publication was not successful, a list of users not receiving the Module is returned. Users might not receive a Module because the workstation’s disk is full or the workstation is off-line. Click the **re-publish** link to re-publish the module to the list of failed users.

- If the publication was successful, a publication successful message is returned.

Overview of Distributing Modules

Distributing is a process of disseminating modules to one or more user Dashboards at one time. Distributing provides a flexible approach to disseminating modules, Dashboard pages, and portlets. Modules, Dashboard pages, and portlets can be distributed to a user’s Dashboard. Distributed modules, Dashboard pages, and portlets are not tracked by the system. Once on a user’s Dashboard, an application administrator cannot edit or delete a distributed module, Dashboard page or portlet.

Distributing modules requires using the Module Distribution wizard. Once open, the Module Distribution wizard takes you through the process of distributing modules.

The following is a list of the steps required publish a module:

- **Step One: Set up Content.** Choose the module to be distributed and set the distribution process to distribute.
- **Step Two: Choose Users.** Choose the recipients of the module. Users can be chosen individually, by groups, or by organizational units. An email can be configured to accompany the module distribution.
- **Step Three: Preview Publication.** Review the module, recipients, and email before initiating the module’s distribution.

Distributing Rules for Modules

The following list details the module distributing rules.

- Modules, individual Dashboard pages, and individual portlets can be distributed.
- Distributed modules, Dashboard pages, and portlets can be edited by the end user.
- Distributed modules, Dashboard pages, and portlets are not tracked by the system.
- Distributed modules, Dashboard pages, and portlets can not be removed by the application administrator.

- A distributed module is not overwritten by an updated version of the distributed module. This means if a module is distributed twice to the same user, the user will receive two copies of the module.

Distributing Modules

This section provides the step-by-step instructions on how to distribute a module.

Opening the Module Distribution Wizard

Distributing modules requires opening the Module Distribution wizard.

To open the Module Distribution wizard:

1. Log on to the standard interface.
2. From the menu bar, select **Administration > Modules > Module Distribution.**

   The Module Distribution page appears the Setup Content page. For more information concerning the Setup Content page, see the next section (*Step One: Set Up Content*).

Step One: Set Up Content

The Setup Content page contains one section, Select Content and Distribution Method. *Figure 4-1* shows the Setup Content page.

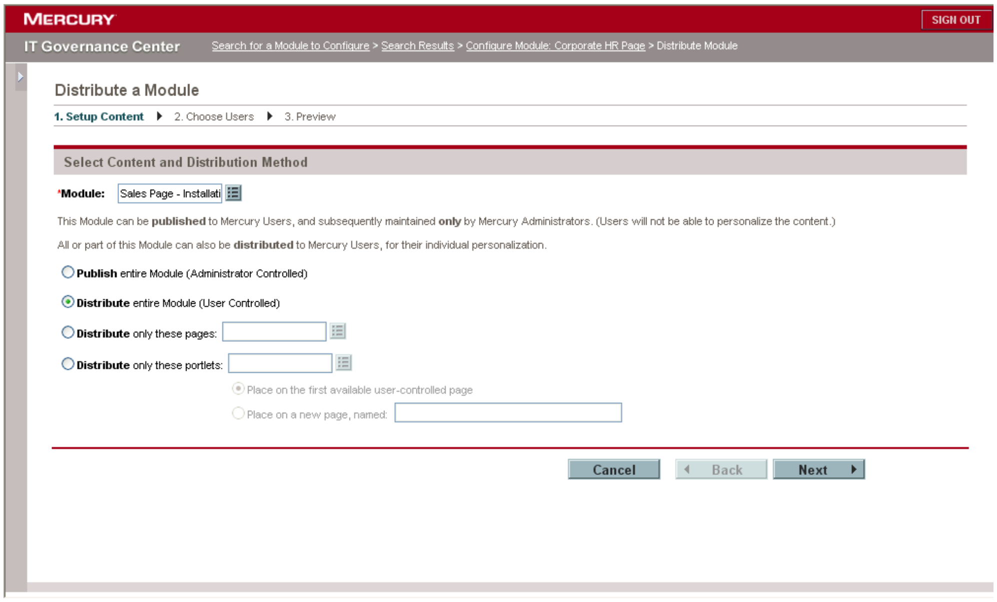


Figure 4-4. Setup Content page

To set up content:

1. In the Select Content and Distribution Method section, in the Module field, enter the name of the module being published.

   Click the auto-complete icon to open the list of available modules. Only one module can be selected.

2. Select the distribution method.

   - To distribute the entire module, select Distribute entire Module (User controlled).

   - To distribute one or more pages from a module, select Distribute only these pages. Select the pages in the accompanying field. Click the auto-complete list icon for a listing of all pages in the module.

- To distribute one or more portlets from a module, select Distribute only these Portlets. Select the portlets in the accompanying field. Click the auto-complete list icon for a listing of all portlets in the module. If Distribute only these Portlets is selected, two additional fields are enabled:
  - Place on the first available user controlled page. To distribute the selected portlets onto a user's existing home page, select Place on the first available user controlled page.
  - Place on a new page, named. To distribute the selected portlets on a new Dashboard page, select Place on a new page, named. In the adjacent field, fill in the name of the new Dashboard page.

3. Click **Next.**

   The Choose Users page appears. For more information concerning the Choose Users page, see the next section (*Step Two: Choose Users*).

Step Two: Choose Users

The Choose Users page contains two sections:

- Select Recipients of Distribution
- Notify User of Distribution

Figure 4-2 shows the Choose Users page.

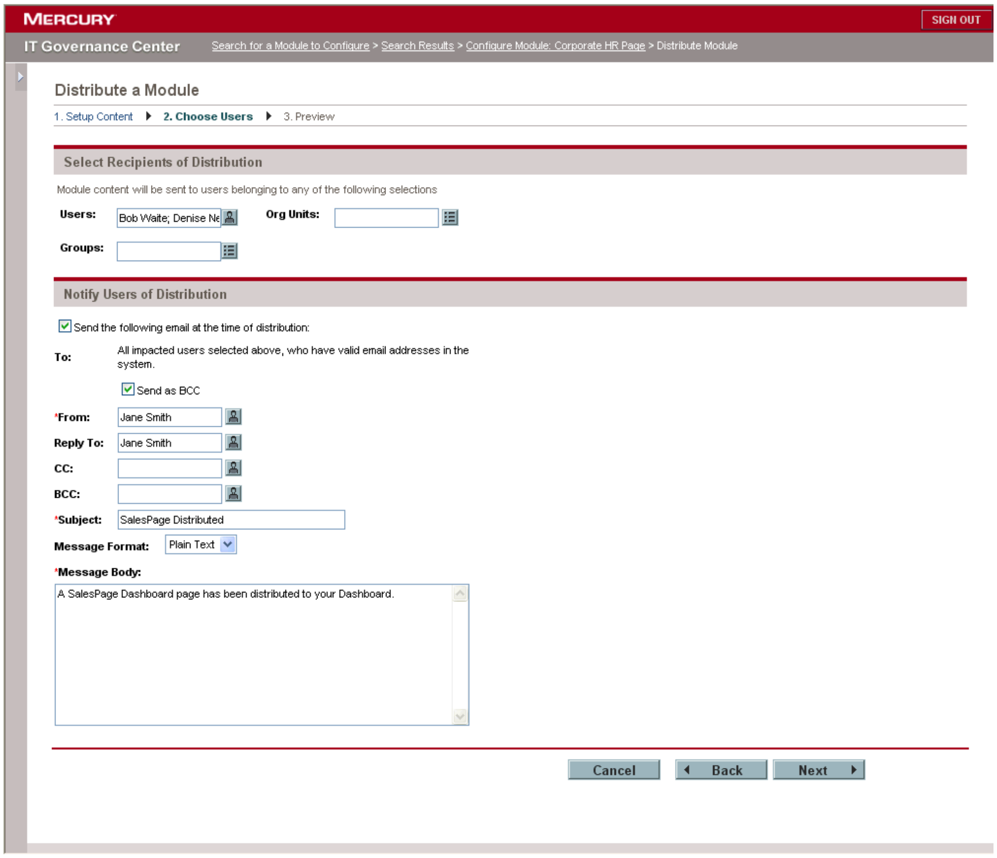


Figure 4-5. Choose Users page

To choose users:

1. In the Select Recipients of Distribution section, select the users and groups receiving the module.

   Click the icons next to the Select Recipients of Distribution fields. Select one or more users or groups for any of the fields. Multiple entries from multiple fields are allowed. At least one entry in one field is required. Users selected multiple times receive only one published module.

Field	Definition
Users	Specify the user or users. A multi-select auto-complete field.
Groups	Specify the group or groups. All users belonging to the specified groups receive the distributed module. A multi-select auto-complete field.
Org Units	Specify the organization unit or units. All users belonging to the specified organizational units receive the published module. A multi-select auto-complete field.

2. In the Notify Users of Distribution section, complete the fields.
3. At the bottom of the Notify Users of Distribution section, in the text area, enter the contents of the email message.

Field	Definition
Send the following email message at the time of publication	By default, all recipients of the distribution are sent the email. Selecting this option enables the remaining fields under the Notify User of Distribution heading. The To field is automatically filled with the impacted users selected under the Select Recipients of Distribution heading.
To	The To field is automatically filled with the impacted users selected under the Select Recipients of Distribution heading.
Send as BCC	This option insures each user only sees their own email address. Deselect this field if the impacted users are to see the entire distribution list. The default is selected.
From	Specify the email address shown in the From field. The default is the current username. If the current user does not have an email address, the field is empty.
Reply To	Specify the email address shown in the Reply To field. The default is the current username. If the current user does not have an email address, the field is empty.
CC	Specify the email address shown in the CC field. This field is for notification purposes only.

Field	Definition
BCC	Specify the email address shown in the BCC field. This field is for notification purposes only. The entire To email address list is included.
Subject	Specify the title or subject of the email.
Message Format	Selects the format of the message. A drop-down menu displays Plain Text and HTML.

4. At the top of bottom of the Choose User page, click **Next.**

   The Preview page appears. For more information concerning the Preview page, see the next section (*Step Three: Preview Distribution*).

Step Three: Preview Distribution

The Preview page consists of the following sections:

- Distribution Content
- Impacted Users
- Email Notification

The Distribution Content section lists the module or modules, Dashboard pages, and the portlets being distributed. The Impacted Users section lists all users receiving the distributed module. The Email Notification section displays how the accompanying email is configured.

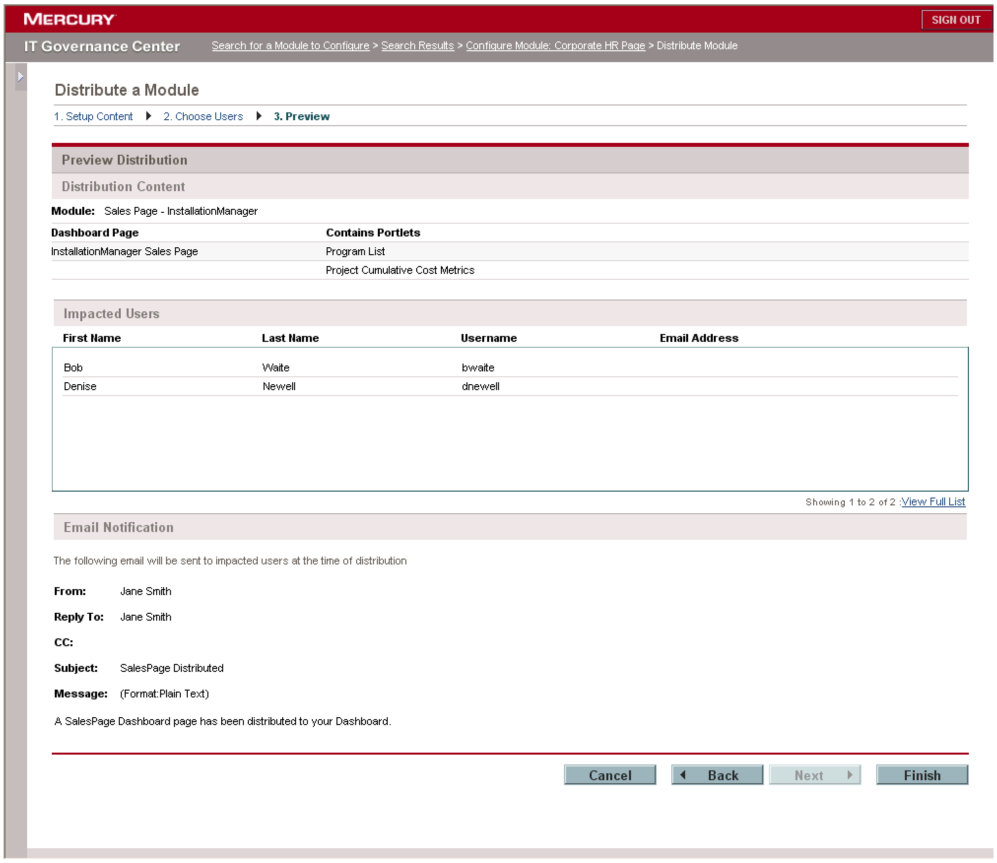


Figure 4-6. Preview page

To preview the distributed module:

1. In the Distribution Content section, verify the module is complete.

   Make sure the module or modules being published include the correct Dashboard pages or portlets.

2. In the Impacted Users section, verify that all of the users are listed.

   Scroll through the list of users to make sure all of the users are listed. To view the complete list of users, click **View Full List.** The All Impacted Users page appears. To close the All Impacted Users page, click **Close Window.**

3. In the Email Notification section, verify the email is configured and worded correctly.

4. Click **Finish.**

   The module or modules are published. The Preview page is closed. A distribution initiated page appears. For more information concerning the distribution initiated page, see the next section (*Verifying a Successful Distribution*).

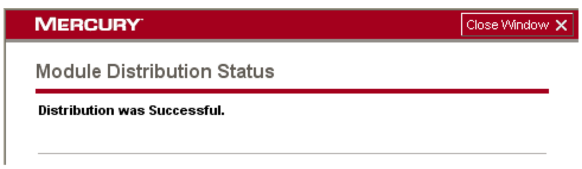
Verifying a Successful Distribution

Once a module is distributed, a distribution initiation page is opened in a separate window. From the distribution initiation page, you can view the status of the distribution or return to the Content Setup page to distribute another module.

To view the distribution status:

1. On the distribution initiation page, select View Distribution Status.

   The Module Distribution Status page appears. A status bar represents the completed portion of the distribution.



   Once the distribution is complete, a final status message is displayed. The final status message states if the distribution was a success, or displays a list of the users not receiving the module.

   - If the distribution was not successful, a list of users not receiving the module is returned. Click the **re-distribute** link to re-distribute the module to the list of failed users.
   - If the distribution was successful, a distribution successful message is returned.

Chapter 5
Removing Modules

In This Chapter:

Overview of Removing Modules

This section provides an overview of how to remove a published module from one or more Dashboards. Dashboard pages and portlets of a published module cannot be personalized or deleted. Published modules are tracked and maintained by Mercury IT Governance Center. This gives an administrator the ability to remove modules that are no longer useful.

For example, a module was created to track specific information concerning a project. The module was then published to all members of the project team. Once the project is over, the module can then be removed from the Dashboards of all the members of the project team.

Removing modules from the Dashboard is a two-step process:

- **Step One: Remove Published Module Setup.** The first step in removing a module from one or more Dashboards is to set up the Remove Published Module page. The Remove Published Module page includes:
  - Selecting the name of the module to remove
  - Selecting the users who will have the module removed from their Dashboards
  - Configuring an email notifying the users the module was removed.
- **Step Two: Remove Published Module Confirm.** The second step in removing a module is to confirm the setup of the Remove Published Module page is correct.

The following list summaries the differences between distributed and published modules with regards to removing modules from a user's Dashboard:

- Distributed modules cannot be removed by the administrator.
- Published modules can be removed by the administrator.
- Published modules are removed by the application administrator.
- A published module is overwritten by an updated version of the published module.

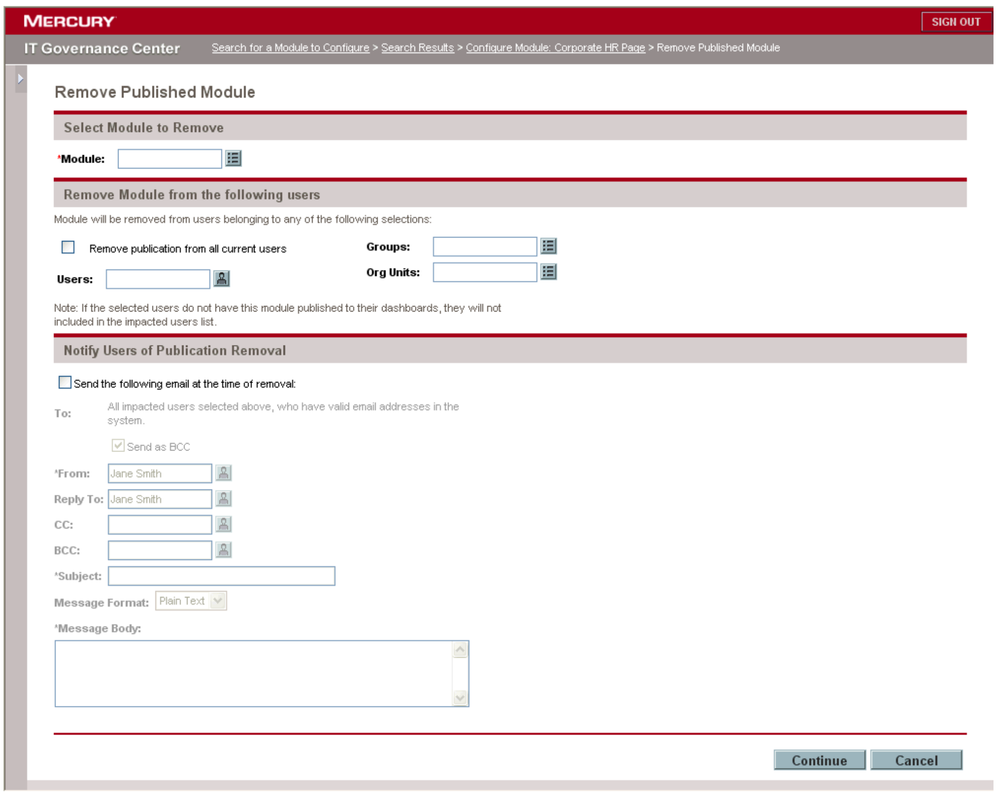
Removing Modules from a User's Dashboard

This section details the steps required to remove a module from a user's Dashboard.

To remove a module from a user's Dashboard:

1. Log on to the standard interface.
2. From the menu bar, click **Administration > Modules > Remove a Published Module.**

   The Remove Published Module page appears.



3. In the Module field, enter the name of the module.

   To search for the module, enter the first few letters of the default Dashboard module's name. Click the icon to the right of the Module field. A single-select auto-complete list displays all modules matching the search criteria. Select one module.

4. In the Remove Module form the following users section, select the users and groups receiving the module.

   Click the icons next to the field names. Select one or more users or groups for any of the fields. Multiple entries from multiple fields are allowed. At least one entry in one field is required. To select all current users of the module, select Remove publication from all current users.

Field	Definition
Users	Specify the user or users. A multi-select auto-complete field.
Groups	Specify the group or groups. All users belonging to the specified groups receive the published module. A multi-select auto-complete field.
Org Units	Specify the organization unit or units. All users belonging to the specified organizational units receive the published module. A multi-select auto-complete field.

5. In the Notify Users of Publication Removal section, complete the fields.

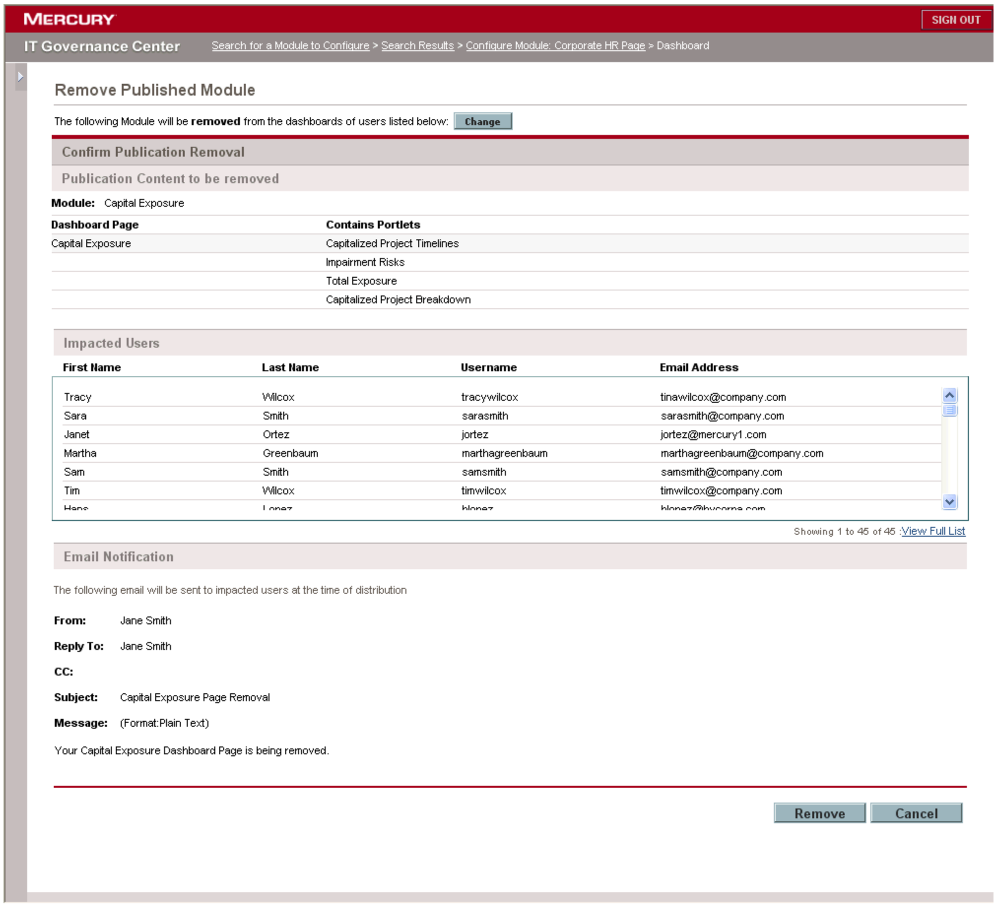
   The following table lists the fields and definitions of the Notify Users of Publication Removal section. At the bottom of the Notify Users of Publication Removal section, in the text area, enter the contents of the email message.

Field	Definition
Send the following email at the time of removal	By default, all impacted users of the module removal are sent the email. Selecting this option enables the remaining fields under the Notify Users of Publication Removal heading. The To field is automatically filled with the impacted users selected under the Notify Users of Publication Removal heading.
To	The To field is automatically filled with the impacted users selected under the Select Recipients of Publication heading.
Send as BCC	This option ensures each user only sees their own email address. Deselect this field if the impacted users are to see the entire distribution list. The default is selected.
From	Specify the email address shown in the From field. The default is the current username. If the current user does not have an email address, the field is empty.

Field	Definition
Reply To	Specify the email address shown in the Reply To field. The default is the current username. If the current user does not have an email address, the field is empty.
CC	Specify the email address shown in the CC field. This field is for notification purposes only.
BCC	Specify the email address shown in the BCC field. This field is for notification purposes only. The entire To email address list is included.
Subject	Specify the title or subject of the email.
Message Format	Selects the format of the message. A drop-down menu displays Plain Text and HTML.

6. At the bottom of the Remove Published Module page, click **Continue.**

   The Remove Published Module confirmation page appears.



7. In the Publication Content to be removed section, verify the module information is correct.

   Make sure the module being removed includes the correct Dashboard pages and portlets.

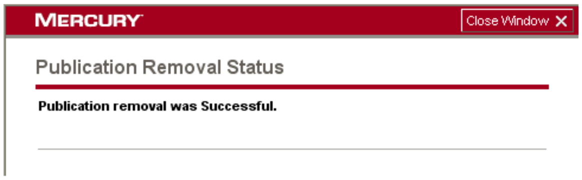
8. In the Impacted Users section, verify that all of the users are listed.

   Scroll through the list of user to make sure all of the users are listed. To view the complete list of users, click **View Full List.** The All Impacted Users page appears. To close the All Impacted Users page, click **Close Window.**

9. In the Email Notification section, verify the email is configured and worded correctly.

10. At the bottom of the Remove Published Module page, click **Remove.**

    The module is removed from the Dashboard of the impacted users. If configured, an email is sent to the list of impacted users, informing them of the removal. The Remove a Published Module confirmation page appears. Click **Cancel** to stop the module removal process.



11. Verify the removal of the published module was successful.

    - Click **View Publication Removal Status,** to see the status of the module removal.
    - Click **Remove another Published Module,** to open the Remove a Published Module setup page.

Chapter

6

Setting the Default Dashboard

In This Chapter:

Overview of Setting the Default Dashboard

The default Dashboard page is the first page seen when opening the Mercury IT Governance Center standard interface. The default Dashboard is designed to allow first-time users to quickly and easily integrate the standard interface into their business processes. The default Dashboard can be published or distributed. Published default Dashboard pages cannot be edited or removed by the owner of the Dashboard. Distributed default Dashboard pages can be edited and removed by the owner of the Dashboard.

Setting the default Dashboard requires opening the Set Default Dashboard page. The Set Default Dashboard page can be opened from the menu bar. You can also open the Set Default Dashboard page from the Select a Module to Configure section of the Configure Modules page.

Setting the Default Dashboard

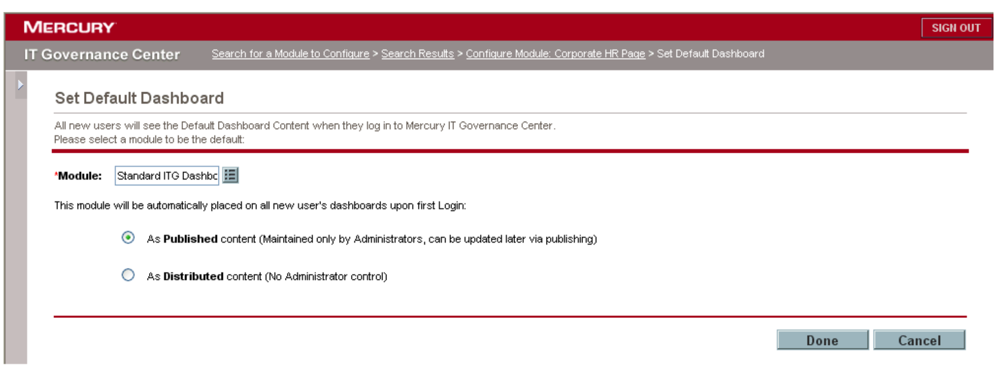
This section details how to set the default Dashboard.

To set the default Dashboard:

1. Log on to the standard interface.

2. From the menu bar, select **Administration > Modules > Set Default Dashboard.**

   The Set Default Dashboard page appears.



3. In the Module field, enter the name of the default Dashboard module.

   To search for the module, enter the first few letters of the default Dashboard module's name. Click the icon to the right of the Module field. A single-select auto-complete list displays all modules matching the search criteria. Select one module.

4. Set the distribution method for the default Dashboard.

   The default Dashboard can be distributed as a published module or a distributed module. Published modules cannot be edited or removed by the owner of the Dashboard. distributed modules can be edited and removed by the owner of the Dashboard.

   - To set the default Dashboard as a published module, select As Published content (Maintained only by Administrators, can be updated later via publishing).

   - To set the default Dashboard as a distributed module, select As Distributed content (No Administrator control).

5. At the bottom of the Set Default Dashboard page, click **Done.**

   The listed module becomes the default Dashboard.

Chapter

7

Creating Portlet Definitions

In This Chapter:

Overview of Creating Portlet Definitions

This section provides a brief overview of how to create a portlet definition. Creating a portlet definition requires the Portlet Definition wizard. The Portlet Definition wizard takes you through the six steps required to create a portlet definition. Once a portlet is defined, the portlet can be added to a Dashboard page. *Figure 7-1* illustrates the six steps required to create a portlet definition.

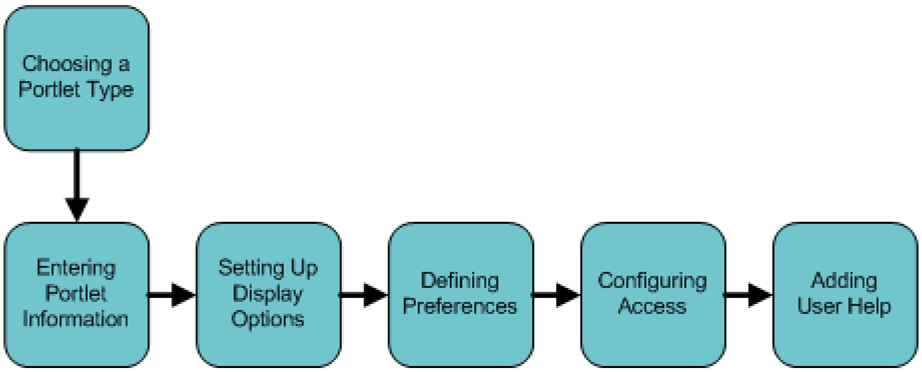


Figure 7-1. Create a portlet definition process

The following steps are required to create a portlet definition:

- **Step One: Choose a Portlet Type.** Choose the type of portlet to create. Portlets can be defined as list portlets, where data is displayed in rows and columns, or as chart portlets, such as the stacked bar chart portlet or the bubble chart portlet. The fields in the subsequent steps vary according to the portlet type being defined.
- **Step Two: Enter Portlet Information.** Enter general information regarding the portlet definition, such as the portlet name and portlet category.
- **Step Three: Set Up the Display Options.** Set up how the portlet will look, such as defining the columns of a list portlet or defining the wedges of a pie chart portlet.
- **Step Four: Define Preferences.** Define the portlet's preferences. A portlet's preferences are found on a portlet's edit page and are used to personalize the portlet.
- **Step Five: Configure Access.** Configure a portlet's access. This is an optional step used to limit who can add the portlet to a Dashboard page and who can edit the portlet definition.

- **Step Six: Add User Help.** Include user help information. The user help information is the information found on a portlet's help page. This is an optional step used to include definitions and instruction concerning the portlet.

Migrating Portlet Definitions

Use the Portlet Definition Migrator object type to migrate portlet definitions. The following is a list of things to consider when migrating portlet definitions:

- **Migrating Built-in Builder Portlet Definitions.** When migrating a Mercury-supplied builder portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- **Migrating Custom Builder Portlet Definitions.** When migrating a custom builder portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- **Migrating Java Portlet Definitions.** When migrating a Java portlet definition, you must configure the source and destination servers with the same set of Web applications (such as WARs) before migrating the Java portlet definition.
- **Migrating WSRP Portlet Definitions.** When migrating a WSRP portlet definition, the migration the portlet definition is sufficient for the WSRP portlet to work. The following lists the conditions where migrating a WSRP Portlet Definition might fail:
  - If the URL uses a port number, then as soon as you move that portlet to a different machine that doesn't have a WSRP provider running on the same port number, the portlet will stop working.
  - If a WSRP portlet definition is sharing a firewall or a private network with a WSRP producer, then you will not be able to migrate the portlet definition outside of that private network or firewalled area (because the machine would no longer be accessible).

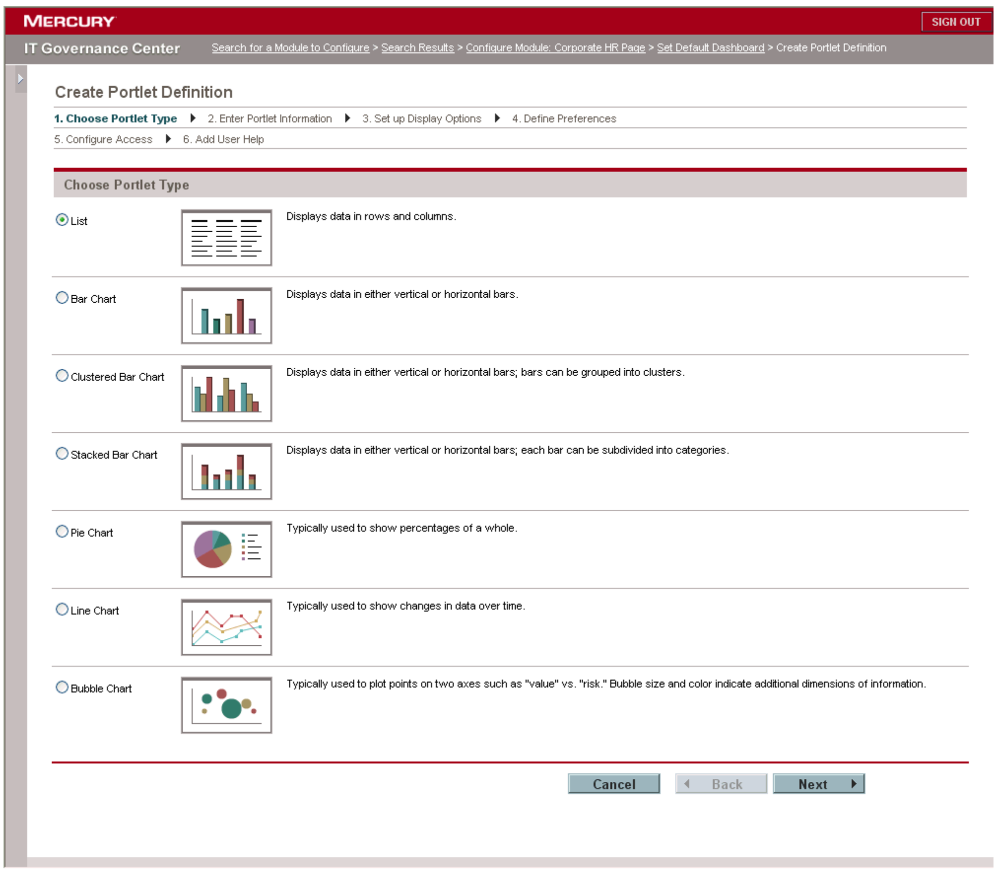
Opening the Portlet Definition Wizard

This section details the steps required to open the Portlet Definition wizard. The Portlet Definition wizard is used to create a portlet definition.

To open the portlet definition wizard:

1. Log on to the standard interface.
2. On the menu bar, click **Administration > Portlet Definitions > Create a Portlet Definition.**

   The Portlet Definition wizard appears.



The following sections describe the steps in the Portlet Definition wizard in detail.

Step One: Choose a Portlet Type

Complete the Choose Portlet Type page (see *Figure 7-2*). The Choose Portlet Type page lists all the available portlet types that can be created in the Portlet Definition wizard.

The following is a list of the portlet categories:

- **List Portlets.** Data is presented in tabular form using rows and columns.
- **Chart Portlets.** Data is presented graphically, such as:
  - **Bar Chart.** Data is displayed as vertical or horizontal bars. Each bar represents a single item.
  - **Clustered Bar Chart.** Data is displayed as vertical or horizontal bars. Bars can be grouped into categories.
  - **Stacked Bar Chart.** Data is displayed as vertical or horizontal bars. Each bar can be subdivided into categories.
  - **Pie Chart.** Data is displayed as a percentage of a whole.
  - **Line Chart.** Data is displayed to show changes over time.
  - **Bubble Chart.** Four dimensions of data are displayed on an x-y axis. The x-y axis pinpoints a spot and the size and color of the bubble indicates additional dimensions of the information.

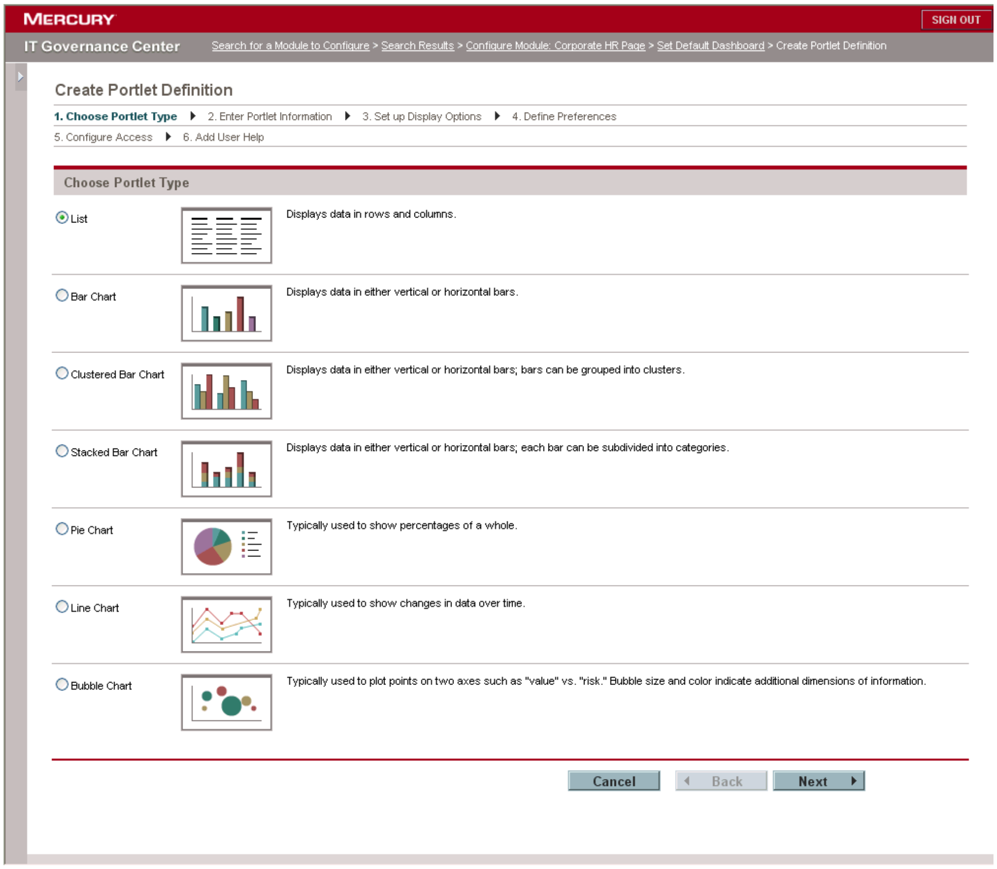


Figure 7-2. Choose Portlet Type page

To choose a portlet type:

1. On the Choose Portlet Type page, select the portlet type by clicking one of the radio buttons.

   Only one radio button can be selected.

2. At the bottom of the Choose Portlet Type page, click **Next.**

   The information is saved. The Enter Portlet Information page appears.

Step Two: Enter Portlet Information

The Enter Portlet Information page is used to define generic information regarding the portlet definition, such as portlet name, portlet category, and the data source to be used for the portlet.

The following lists the sections of the Enter Portlet Definition page:

- **Portlet Information.** Use the Portlet Information section to enter generic information regarding the portlet definition. Use the **Manage Categories** button to add new portlet categories to the system.
- **Data Source.** Use the Data Source section to add the data source to the portlet definition. The data source defines the data available to the portlet. This can include the columns that can be added to the portlet or sources for the bars on a bar chart.

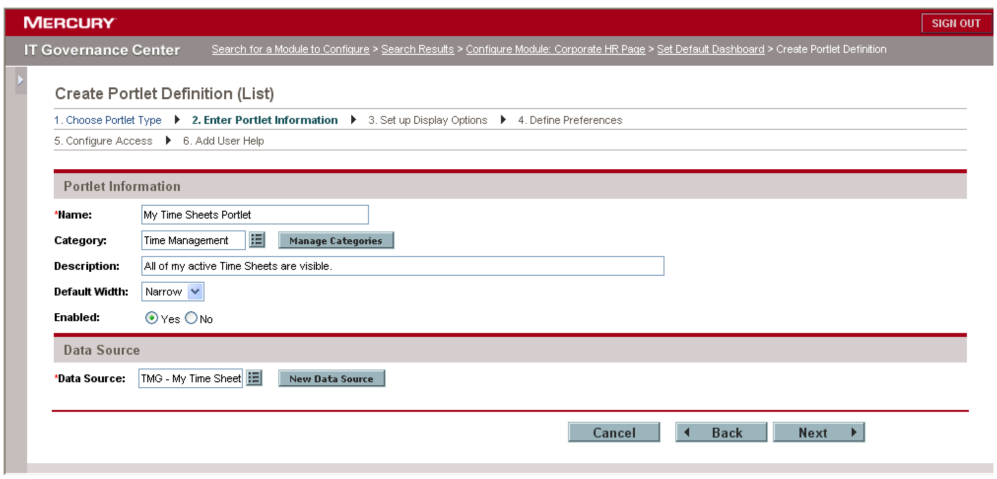


Figure 7-3. Enter Portlet Information page

Entering Information for Portlet Definitions

Part of the second step in creating a portlet definition is to enter information for a portlet definition.

Enter information for a portlet definition:

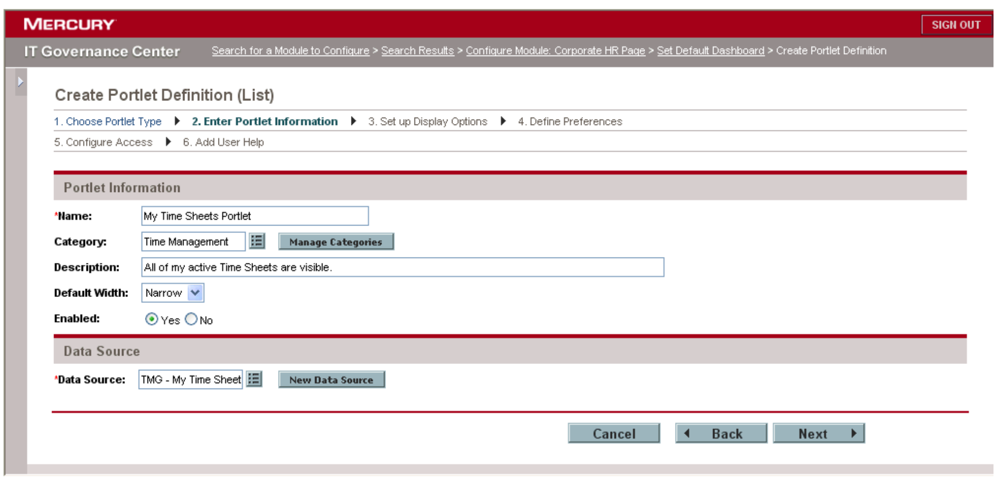
1. On the Enter Portlet Information page, complete or select the portlet definition's generic information.

   See the following list of the fields and definitions of the Enter Portlet Information page.

Fields or Buttons	Definitions
Name	The name of the portlet. This is a required text field. The name of the portlet must be unique. The maximum length of the name is 80 characters.
Category	The functional categories of the portlet. By grouping portlets into portlet categories, finding a specific portlet to add to a Dashboard page is made easier. Typically, portlet categories are organized by entities, such as requests or tasks. Portlet categories can also define functional groups, such as development or test. This is an optional multi-select auto-complete field. Select one or more categories.
Manage Categories	Clicking the **Manage Categories** button displays the Manage Categories page. Use the Manage Categories page to add or delete portlet categories. For more information concerning the Manage Categories page, see *Managing Portlet Categories*.
Description	Description of the portlet definition. It's be helpful to describe the main function of the portlet, such as *Showing Projects for a desired Program*. This description is available when you add a portlet to your Dashboard page. This is an optional text field. The maximum length of the description is 1800 characters.
Default Width	Sets the default width of the portlet. This is a drop-down list with the values Narrow and Wide. The default is Narrow. You can override the default width when you personalize the portlet.
Timeout	Shows the length of time before a portlet should time out. This is an optional numeric text field. The default is 20.

Fields or Buttons	Definitions
Enabled	Indicates whether the portlet can be added to the Dashboard page. Yes enables the portlet to be added to a Dashboard page. These are Yes/No radio buttons. Only one value can be selected. The default is Yes. If a portlet is added to a Dashboard, then disabled, the portlet remains on the Dashboard page.
Data Source	The data source defined for the current portlet. The data source defines the columns or chart entity, and preferences fields for a portlet definition. This is a required auto-complete list displaying all of the available portlet data sources.

2. At the bottom of the Choose Portlet Type page, click **Next.**



The Set up Display Options page appears.

Managing Portlet Categories

An optional part of the second step in creating a portlet definition is to manage the portlet categories. Portlet categories define an entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet makes a portlet easier to find. Use the Manage Categories page to add or delete portlet categories.

Adding a portlet category requires the Manage Categories page (see *Figure 7-4*). The Manage Categories page is accessed from the Enter Portlet Information page or the Configure Portlet Definitions page.

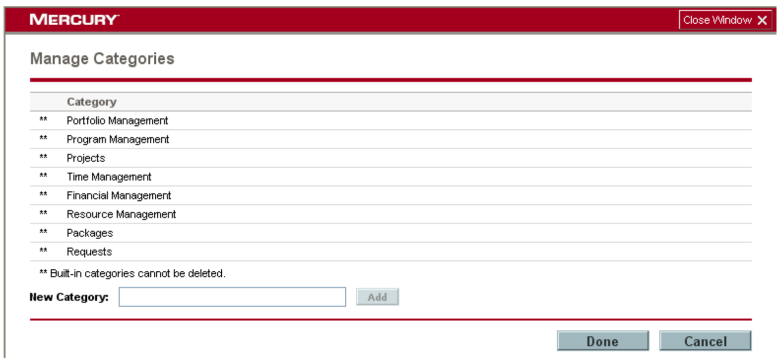


Figure 7-4. Manage Categories page

Adding Portlet Categories

An optional part of the second step in creating a portlet definition is to manage portlet categories. This section details how to add a portlet category.

To add a portlet category:

1. On the Enter Portlet Information page, click **Manage Categories.**

   The Manage Categories page appears.

2. On the Manage Categories page, in the Category section, enter a new category name in the New Category field.

3. Next to the New Category field, click **Add.**

   The new category is added to the Category list.

4. At the bottom of the Manage Categories page, click **Done.**

   The change to portlet Category list is saved to the system and the Manage Categories page is closed. The Enter Portlet Information page appears.

For More Information

For more information concerning the Enter Portlet Information page, see *Entering Information for Portlet Definitions*.

Deleting Portlet Categories

An optional part of the second step in creating a portlet definition is to manage portlet categories. This section details how to delete a portlet category. Note that portlet categories delivered with Mercury IT Governance Center cannot be deleted. You cannot delete a portlet category containing one or more portlets.

To delete a portlet category:

1. On the Enter Portlet Information page, click **Manage Categories.**

   The Manage Categories page appears.

2. On the Manage Categories page, in the Category section, click the delete icon next to the portlet category.

   The portlet category is deleted. If a portlet category does not have a delete icon, the category cannot be deleted.

3. At the bottom of the Manage Categories page, click **Done.**

   The change to portlet category list is saved to the system and the Manage Categories page is closed. The Enter Portlet Information page appears.

Step Three: Set Up the Display Options

Complete the Set up Display Options page (see *Figure 7-5*). The Set up Display Options page is used to set up the display of the portlet's data. Portlet data can be set up to display the columns of a list portlet, or the bars, wedges, lines, or bubbles of a chart portlet. The Set up Display Options page also defines how to arrange the portlet's data.

The sections and fields of the Set up Display Options page varies depending on the portlet type chosen. This section details how to complete the Set up Display Options page for a list portlet.

List portlets display data in rows and columns. The columns available to the list portlet are set up in this step. To make a column available to a list portlet, you must add the column to the Set up Display Options page.

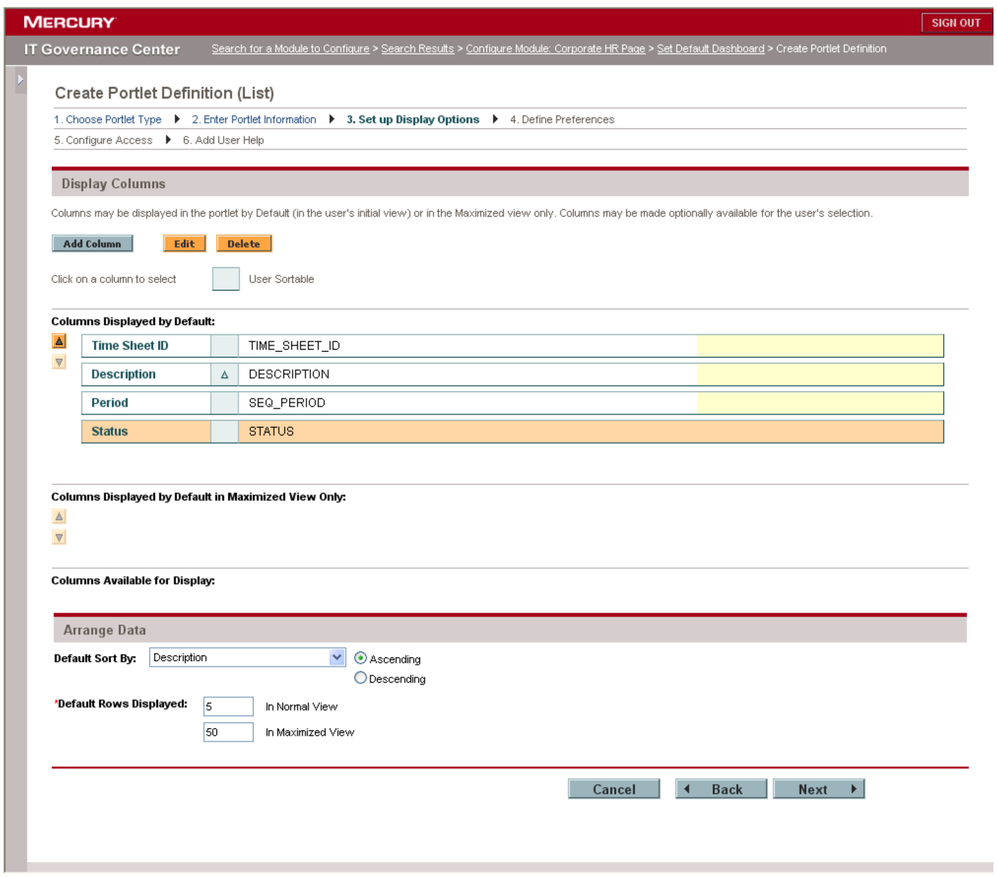


Figure 7-5. Set up Display Options

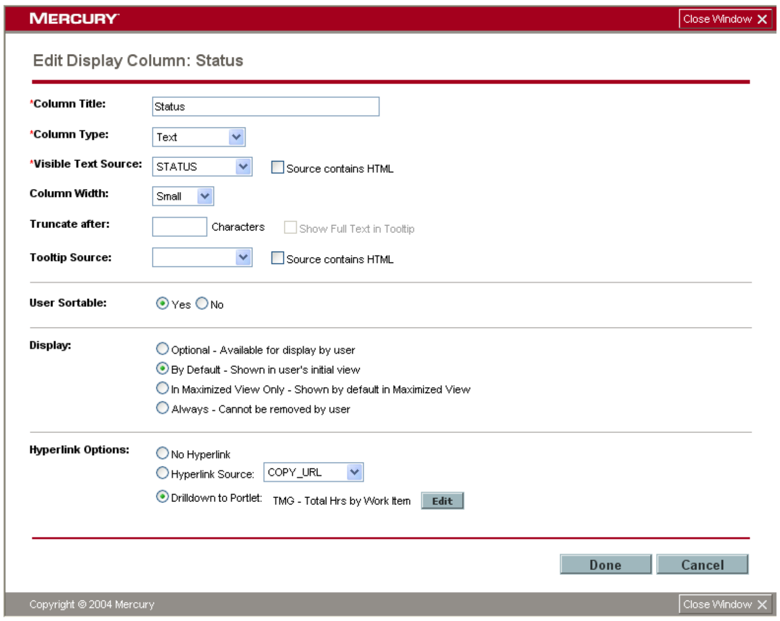
Adding a Column to the Set up Display Options Page

Complete the Set up Display Options page (see *Figure 7-5*). This section details how to add a column to the Set up Display Options page.

To add a column to the Set up Display Options page:

1. On the Set up Display Options page, click **Add Column.**

   The Add Display Column page is opened.



2. On the Add Display Column page, complete all of the fields.

   The following is a list of the fields and field definitions for the Add Display Column page. Depending on the type of portlet and the column type, the fields of the Add Display Column page change. See *Additional Create Portlet Definition Pages* for all of the available Add Display Column pages and field definitions.

Fields	Definitions
Column Title	The displayed column title in the portlet. This is a required text field.
Column Type	The type of the column. This is a required drop-down list. The column types are: • Text • Text with Icon • Icon • Progress Bar
Visible Text Source	The data column that contains the information to display in the portlet. This is a required drop-down list of all of the columns from the data source. This field is only shown when the column type is Text or Text with Icon.
Source contains HTML	Selecting this option enables support for HTML in the Visible Text Source field.
Column Width	The weight of column relative to each other. A drop-down list where the values are: Small, Medium, and Large. This field is visible only with the columns type is Text or Text with Icon.
Truncate after X characters	Allows users to set a limit on how many characters are shown in the column. This is a numeric text field. Only positive values (greater than zero) are allowed. This field is visible only with the columns type is Text or Text with Icon.
Show Full Text in Tooltip	When users choose to truncate after X characters, this option can be used to show the full text a in tooltip. If this field is selected, the Tooltip Source column is disabled. This field is only shown when the Column Type is Text or Text with Icon.
Tooltip Source	The data column that contains the Tooltip text. This is a drop-down listing all of the columns from the data source.
Source contains HTML	Selecting this option enables support for HTML in the Tooltip column.
User Sortable	Controls whether the current column can be used for sorting purpose.

Fields	Definitions
Display	Options for how the column should be displayed. This field contains a radio button group. The values are: • **Optional.** Selecting this option makes the column available to the user in the portlet's edit page (Available Column). • **By Default.** Selecting this option makes, by default, the column visible in the portlet (Displayed Column). • **In Maximized View Only.** Selecting this option makes, by default, the column visible in the portlets Maximized View only (Additional Columns Displayed in Maximized View). • **Always.** Selecting this option requires the column to be visible in the portlet (Displayed Column with asterisk). The default selected is By Default.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. This drop-down lists all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.

3. Define a drilldown page for a column.

   The Edit Drilldown page defines which portlet to drilldown to and what fields should be carried over. Initially, the fields with the same names in the current portlet definition and the Drill-to Portlet Definition are mapped automatically and listed in the table.

   To define a drilldown page:

   a. In the Hyperlink Options section, select Drilldown to Portlet.

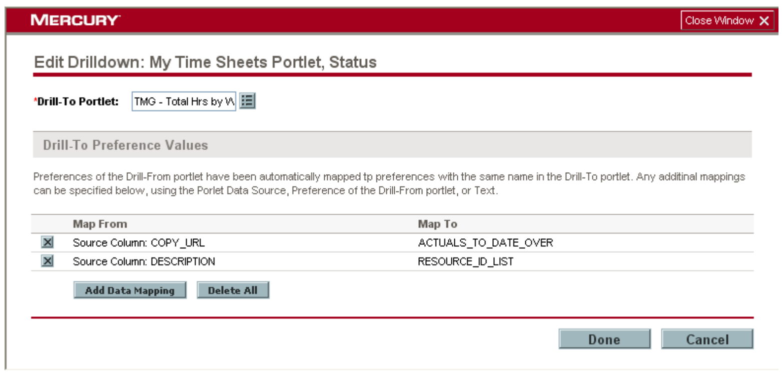
      The **Edit** button next to the Drilldown to Portlet field is enabled.

b. In the Hyperlink Options section, click **Edit.**

The Edit Drilldown page appears.

c. On the Edit Drilldown page, in the Drill-To Portlet field, select a portlet definition from the drop-down list.

The Drill-To Portlet field is populated with the name of the selected portlet definition. Preferences in the current portlet definition are mapped to identically named preferences in the Drill-To Portlet.



d. Delete all mappings between the current portlet definition and the Drill-To Portlet Definition

Occasionally, it's easier to delete and remap the current portlet definitions and the Drill-To Portlet definitions.

To delete all mappings between the current portlet definition and the Drill-To Portlet Definition:

i. In the Drill-To Preferences Values section, click **Delete All.**

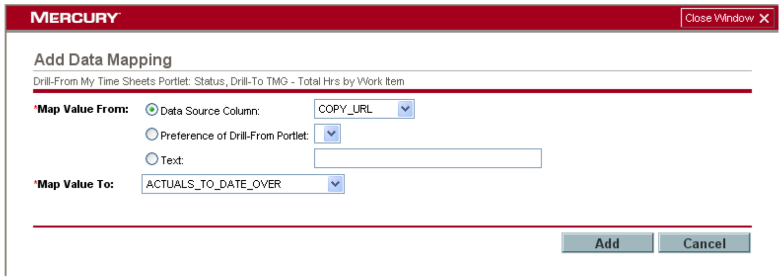
ii. All of the mappings between the current portlet definition and the Drill-To Portlet definition are deleted.

e. Map a preference between the current portlet definition and the Drill-To Portlet definition.

To map a preference between the current portlet definition and the Drill-To Portlet definition:

i. In the Drill-To Preferences Values section, click **Add Data Mapping.**

The Add Data Mapping page appears.



ii. Complete all of the fields on the Add Data Mapping page.

The following is a list of the fields and field definitions for the Add Data Mapping page.

Fields	Definitions
Map Value From	A radio button group listing the following: • **Data Source Column.** Enables the Data Source Column drop-down list. • **Preferences of Drill-From Portlet** • **Text** Only one radio button can be chosen.
Data Source Column	One of the Map Value From Options. Maps the value from one of the Data Source Columns of the current portlet definition. This is a drop-down list displaying all of the columns in the data source of the current portlet definition.
Preference of Drill-From Portlet	One of the Map Value From Options. Maps the value from one of the Preference columns of the current portlet definition. This is a drop-down list displaying all columns from the Preference columns of the current portlet definition.
Text	One of the Map Value From Options. Could be any string literals. This is a text field.
Map Value To	List of preference fields from the Drill-To Portlet. This is a required drop-down list displaying all the preference fields in the Drill-To Portlet.

iii. At the bottom of the Add Data Mapping page, click **Add.**

The preference mapping between the current portlet definition and the Drill-To Portlet definition is added to the Edit Drilldown page. The Edit Drilldown page appears.

f. On the Edit Drilldown page, click **Done.**

The drilldown information is added to the current portlet definition. The Edit Display Column page appears.

4. At the bottom of the Edit Display Column page, click **Done.**

5. At the bottom of the Add Display Column page, click **Done.**

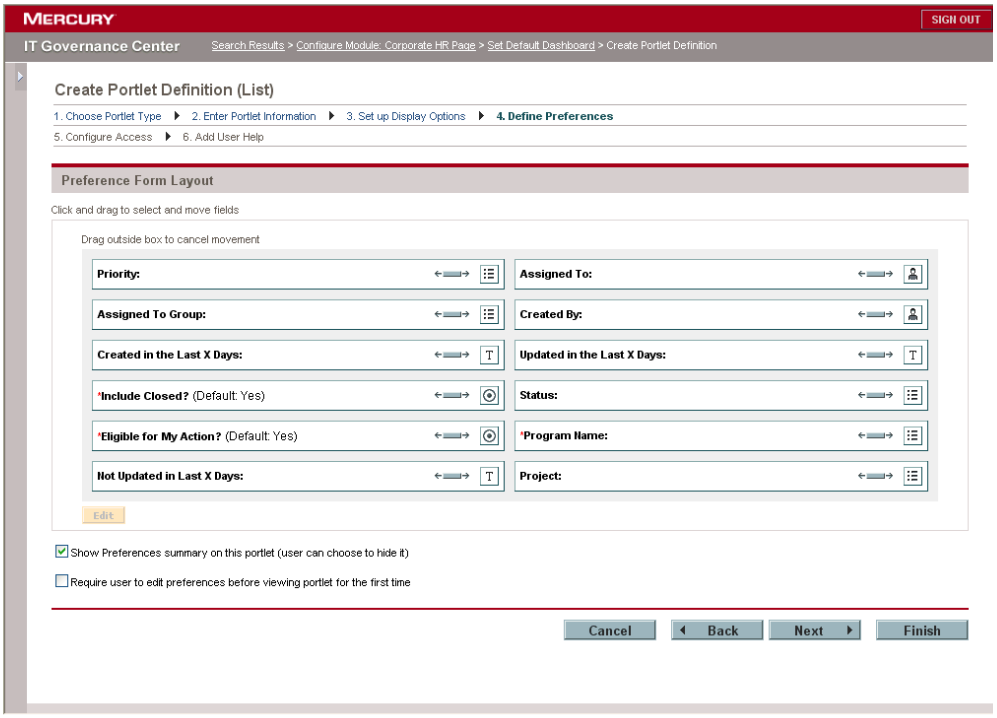
   The Set up Display Options page appears. The column configured on the Edit Display Column page appears in the Set up Display Options page.

6. In the Arrange Data section, set the following:

   - In the Default Sort By field, select the sort field for the portlet definition. The drop-down menu list displays all of the columns listed in the Display Columns section.
   - Select the sort order. Select Ascending to sort alphanumerically from the lowest to highest. Select Descending to sort alphanumerically from the highest to the lowest. The default is Ascending.
   - In the Default Rows Displayed X In Normal View, enter the number of rows viewed in the portlet's normal view. The default is five.
   - In the Default Rows Displayed X In Maximized View, enter the number of rows viewed in the portlet's maximized view. The default is 50.

7. At the bottom of the Set up Display Options page, click **Next.**

   The changes made to the Set up Display Options page are added to the new portlet. The Define Preferences page appears.


MERCURY
SIGN OUT
IT Governance Center
Search Results > Configure Module: Corporate HR Page > Set Default Dashboard > Create Portlet Definition
Create Portlet Definition (List)
1. Choose Portlet Type
2. Enter Portlet Information
3. Set up Display Options
4. Define Preferences
5. Configure Access
6. Add User Help
Preference Form Layout
Click and drag to select and move fields
Drag outside box to cancel movement
Priority:
Assigned To:
Assigned To Group:
Created By:
Created in the Last X Days:
Updated in the Last X Days:
*Include Closed? (Default: Yes)
Status:
*Eligible for My Action? (Default: Yes)
*Program Name:
Not Updated in Last X Days:
Project:
Edit
Show Preferences summary on this portlet (user can choose to hide it)
Require user to edit preferences before viewing portlet for the first time
Cancel
Back
Next
Finish

Editing Existing Columns on the Set up Display Options Page

This section details how to edit an existing column on the Set up Display Options page. *Figure 7-6* shows the Set up Display Options page.

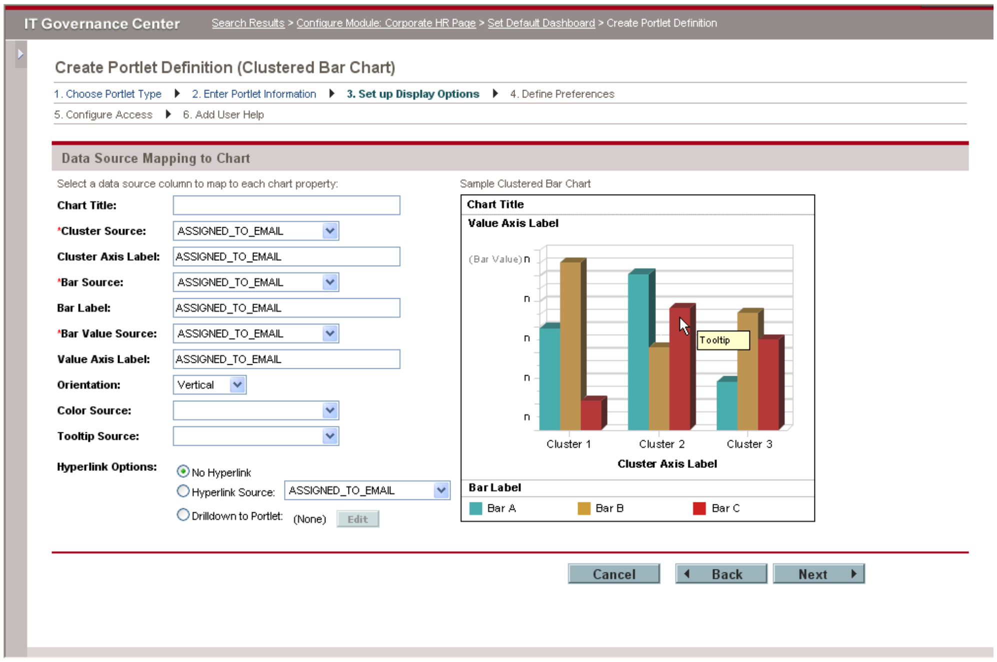


Figure 7-6. Set up Display Options

To edit an existing column:

1. On the Set up Display Options page, select a column.

   The column is highlighted.

2. On the Set up Display Options page, click **Edit.**

   The Edit Display Column page appears. The configuration of the highlighted column is visible. See *Adding a Column to the Set up Display Options Page* for more information regarding the Edit Display Column page. Once the selected column is edited, you are returned to the Set up Display Options page.

3. At the bottom of the Set up Display Options page, click **Next.**

   The changes made to the Set up Display Options page are added to the new portlet. The Define Preferences page appears.

Deleting Columns on the Set up Display Options Page

This section details how to delete an existing column on the Set up Display Options page. *Figure 7-7* shows the Set up Display Options page.

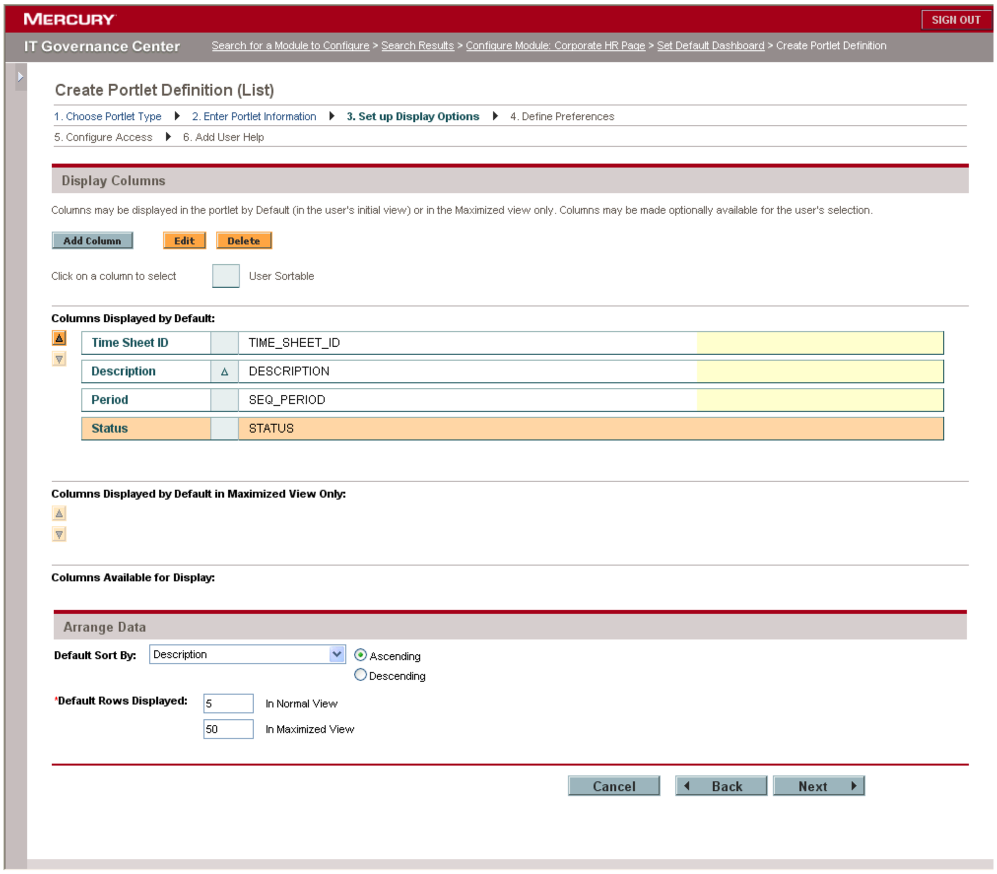


Figure 7-7. Set up Display Options

To delete an existing column:

1. On the Set up Display Options page, select a column.

   The column is highlighted.

2. On the Set up Display Options page, click **Delete.**

   The highlighted column is removed.

3. At the bottom of the Set up Display Options page, click **Next.**

   The changes made to the Set up Display Options page are saved to the new portlet. The Define Preferences page appears.

Step Four: Define Preferences

Complete the Defining Preferences page (see *Figure 7-8*). The Defining Preferences page determines which preference fields should be displayed and how they are laid out for the users of this portlet (in the Preferences section of the portlet's edit page).

Initially, all preference fields are mapped from data source, which indicates the name of the field, type of the field, and list of values if it's a drop-down field or auto-complete field. You can then hide fields, set default values, or lay out the fields.

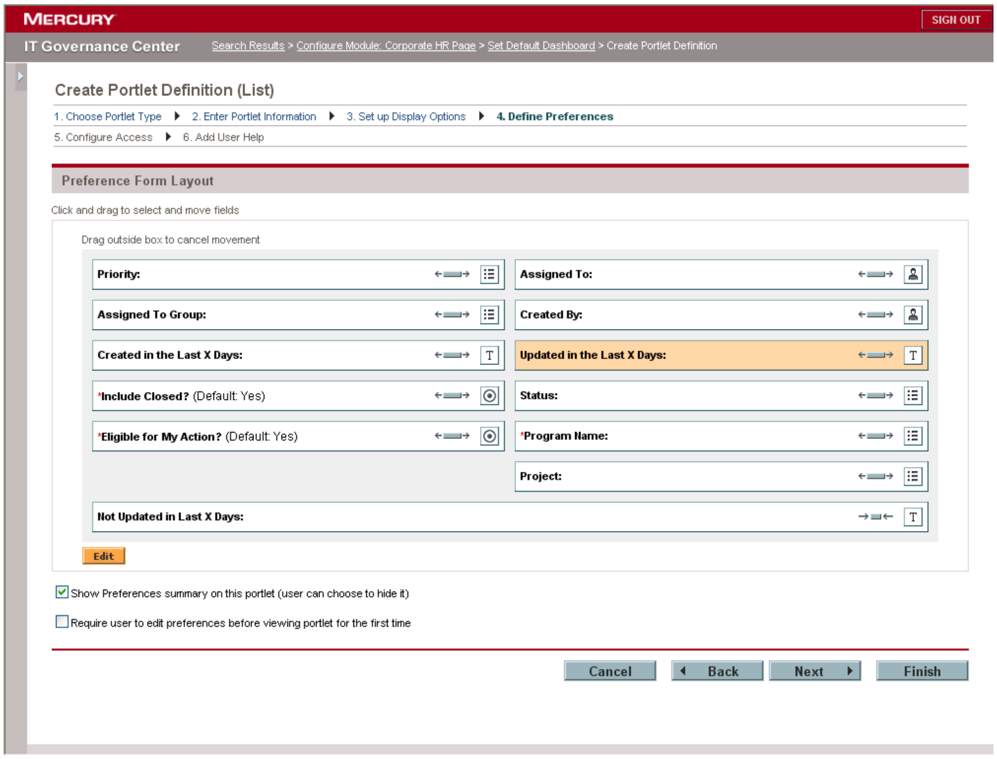


Figure 7-8. Defining Preferences page

To define a preference:

1. On the Define Preferences page, in the Preference Form Layout section, chose whether the user has the option to show or hide the preferences summary on the portlet.
   - To show the preferences summary on the portlet, make sure the Show preferences summary on this portlet option is selected (default).
   - To hide the preferences summary on the portlet, make sure the Show preferences summary on this portlet option is not selected.
2. On the Define Preferences page, in the Preference Form Layout section, chose whether a user must edit the portlet before viewing the portlet for the first time.
3. Select the width of the preference:
   - A preference can be narrow or wide.

   To make a preference narrow:

   a. In the Preference Form Layout section, select a wide preference.

      The preference is highlighted.

   b. On the highlighted preference, click the sizing icon.

      The preference becomes narrow.

   - To make a preference wide:

   a. In the Preference Form Layout section, select a narrow preference.

      The preference is highlighted.

   b. On the highlighted preference, click the sizing icon.

      The preference becomes wide.

4. Move the position of a preference.

   Both wide and narrow preferences can be moved up and down. In addition, narrow preferences can be moved left or right.

   To move a preference:

   a. In the Preference Form Layout section, select a preference.

      The preference is highlighted.

   b. Drag and drop the highlighted preference to its new location.

5. Edit a preference.

   This is a pop-up window allowing administrators to change the prompt, or display choice of the field and set a default value for the field. There is an indication when the field is a data source required preference.

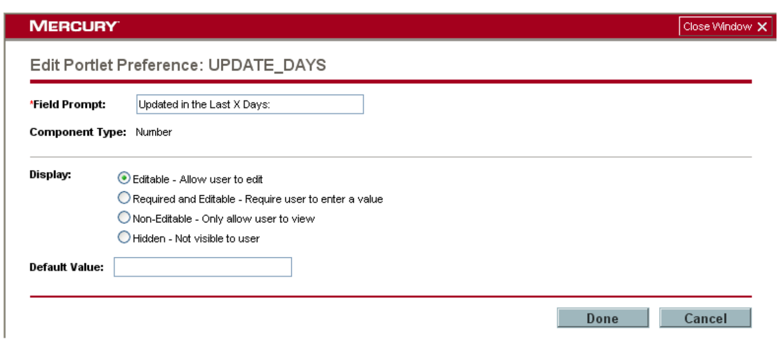
   To edit a preference:

   a. In the Preference Form Layout section, select one of the preferences.

      The selected preference is highlighted.

   b. In the Preference Form Layout section, click **Edit**.

      The Edit Portlet Preference page appears. The fields of the Edit Portlet Preference page are different for each different preference.



   c. Complete all of the fields on the Edit Portlet Preference page.

      The following lists the fields and definitions for the Edit Portlet Preference page.

Fields	Definitions
Field Prompt	The prompt of the field that shows on the Portlet Preference page. This is a required text field. The default is the name in the data source.
Component Type	The component type of the field. Supported component types are: • Auto Complete • Multi-select Auto Complete • Text Field • Currency Text Field • Numeric Text Field • Date • Drop-down List • Yes/No Radio button
List of Values	The name of the list, which contains all available values the user can choose for this field.
Display	This field controls the display property of the preference field in the portlet. This field is a radio button group with the following values: • **Editable.** Allows the user to edit the field. • **Required and Editable.** Require user to enter a value. • **Non-Editable.** Only allow user to view. • **Hidden.** Not visible to user. This field is required if a default value is required by the data source.
Default Value	The default value set for the field. This value is shown when editing the portlet. The component is the same as the Component Type. This field is required if a default value is required by the data source.

d. At the bottom of the Edit Portlet Preferences page, click **Done.**

e. The changes to preference are saved. The Definition Preferences page appears.

6. At the bottom of the Define Preferences page, click **Next.**

   The changes made to the Define Preferences page are added to the new portlet definition. The Configure Access page appears. For more information regarding the Configure Access page, see the next section (*Step Five: Configure Access*).

Step Five: Configure Access

Complete the Configure Access page (see *Figure 7-9*). The Configure Access page allows you to set up the user and group access to the portlet. The following lists the sections of the Configure Access page:

- **User Access.** This section controls the users or group of users that can add this portlet to their Dashboards.
- **Administrator Access.** This section controls the users or group of users that can configure this portlet definition after it is created. Note that the specified users still need privilege Configure Portlet Definitions in order to configure a portlet definition.
- **WSRP Access.** This section makes the portlet available to WSRP consumers.

Initially, access to a portlet definition is given to all users in User Access or all administrators in Administrator Access. If the application administrator removes all securities from the list, then the portlet definition returns to initial access, which is either to all users in User Access or all administrators in Administrator Access.

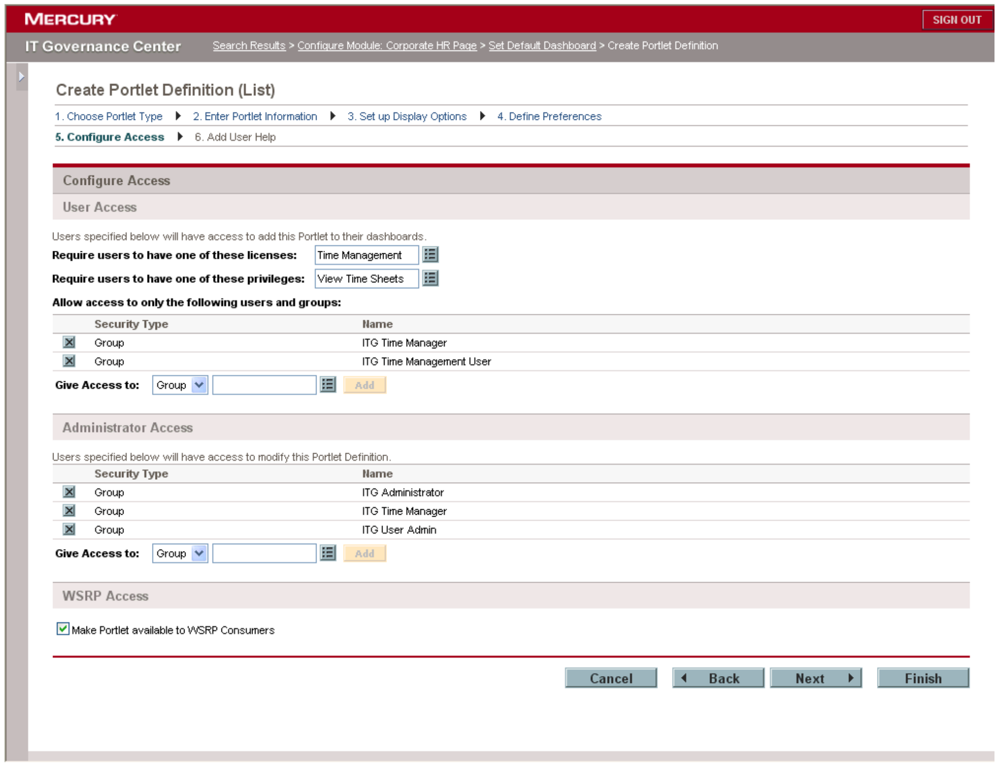


Figure 7-9. Configuring Access page

To configure portlet access:

1. On the Configure Access page, in the User Access section, select the license or licenses a user must have to add the portlet to a Dashboard page.

   Based on this selection, only users having one of the selected licenses can add this portlet to their Dashboards.

2. On the Configure Access page, in the User Access section, select the access grant or grants a user must to add the portlet to a Dashboard page.

   Based on this selection, only users having one of the selected licenses and access grants can add this portlet to their Dashboards.

3. Add a user or group to the Allow access to only the following users and groups list.

   a. In the User Access section, in the Give Access to field, select User or Group from the drop-down list.

      - User. Specific users are given access to add the portlet to their Dashboard page.
      - Group. Specific groups are given access to add the portlet to their Dashboard page.

   b. In the User Access section, next to the auto-complete list, select a resource.

   c. In the User Access section, click **Add.**

      The selected resource is added to the Allow access to only the following users and groups list.

4. Add a user or group to the Users specified below will have access to modify this Portlet Definition list.

   a. In the Administrator Access section, in the Give Access to field, select User or Group from the auto-complete list.

      - User. Specific users are given access to modify the portlet.
      - Group. Specific groups are given access to modify the portlet.

   b. In the Administrator Access section, next to the auto-complete list, select a resource.

   c. In the Administrator Access section, click **Add.**

      The selected resource is added to the Users specified below will have access to modify this Portlet Definition list.

5. (Optional) Make the portlet available to WSRP consumers.

   In the WSRP section, select Make Portlet available to WSRP Consumers.

   Selecting this allows the Dashboard to act as a WSRP provider. This makes this portlet available to other centers or validated consumers. The default is deselected.

6. At the bottom of the Configure Access page, click **Next.**

   The changes made to the Configure Access page are added to the new portlet definition. The Add User Help page appears.

Step Six: Add User Help

Complete the Add User Help page (see *Figure 7-10*). The Add User Help page contains a text area for you to define the portlet and fields. This will help the portlet user to understand better what this portlet does. The text defined here will be displayed in Portlet Help on the Dashboard.

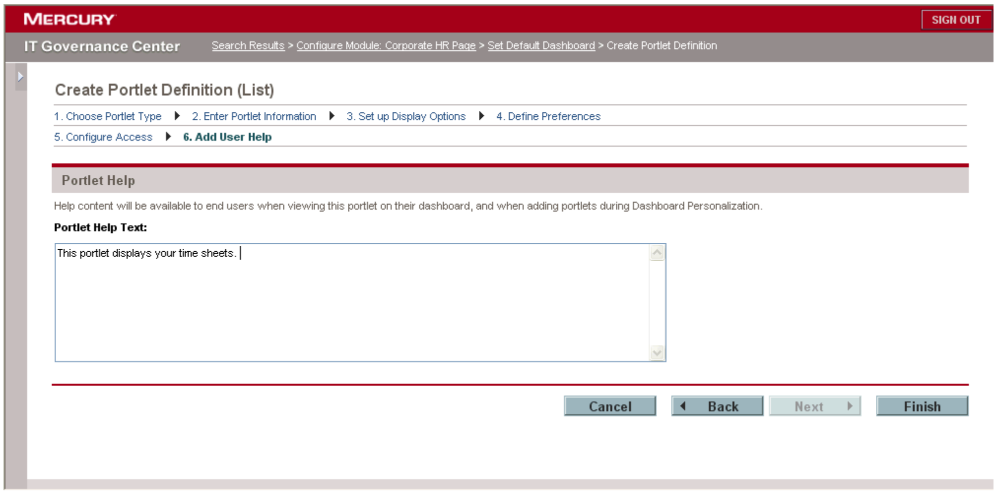


Figure 7-10. Add User Help page

To add user help:

1. On the Add User Help page, in the Portlet Help Text field, enter the help text.

   The Portlet Help Text field supports HTML. Enter the HTML code that defines the functionality of the portlet and lists and describes all of the portlet fields.

2. From the bottom of the Add User Help page, click **Finish.**

   The Add User Help page is saved and the portlet definition is created. The Add User Help page is closed and a portlet definition confirmation page appears. See the next section (*Confirming Portlet Definitions*) for more information concerning a portlet definition confirmation page.

Confirming Portlet Definitions

Once a portlet definition is successfully created, a portlet definition confirmation page is opened. The portlet definition confirmation page confirms that the portlet definition has been successfully created, and offers some links on what to do next. *Figure 7-11* shows a typical confirmation message. *Table 7-1* lists the links on what to do next.

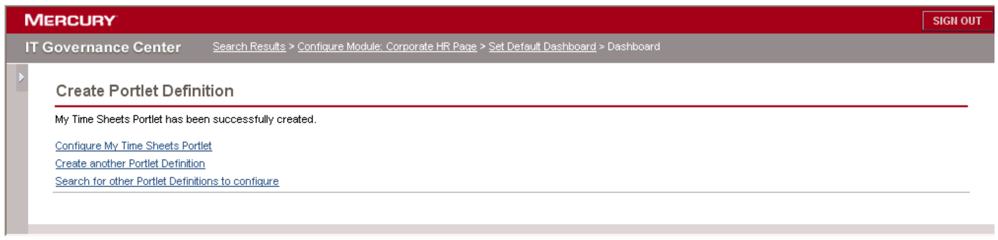


Figure 7-11. Portlet definition confirmation message

Table 7-1. Portlet definition confirmation message links

Link	Definition and Destination
Configure <*Portlet Definition Name*> Portlet	Loads the Configure Portlet Definition page for the newly created portlet definition. Select this link to make changes to the newly created portlet definition.
Create another Portlet Definition	Loads the Create a Portlet Definition wizard. Select this link to create a new portlet definition.
Search for other Portlet Definitions to configure	Loads the Configure Portlet Definition page. Select this link to search for an existing portlet definition to open in the Configure Portlet Definition page.

Additional Create Portlet Definition Pages

This section describes additional pages found when creating a portlet definition.

Setting up Display Options Pages

This section includes descriptions of the different Set up Display Options pages available. The Set up Display Options page is the third step required to create a portlet definition, as discussed in *Step Three: Set Up the Display Options* on page 88.

List Portlet Page

This section lists and defines the sections, fields, and buttons of the Set up Display Options page for list portlets. *Figure 7-12* shows the Set up Display Options page for list portlets. *Table 7-2* lists and defines the fields and buttons of the Set up Display Options page for list portlets.

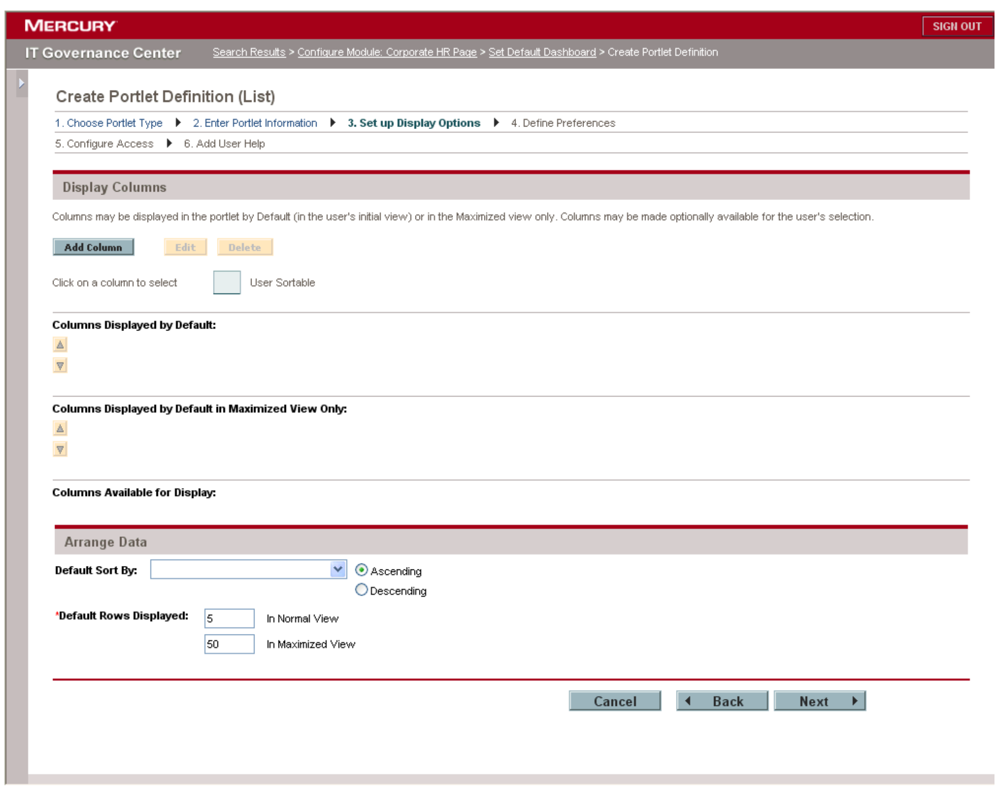


Figure 7-12. Set up Display Options page for list portlets

Table 7-2. Set up Display Options page for list portlet fields and buttons

Field and Buttons	Description
Display Columns	This section contains all the columns. Each column contains some sample data (data source name, sample icon, progress bar), display option section (Optional, Default, Always, or Maximized View), Hyperlink (shows data source name), Drill-To portlet and tooltip (shows data source name) if available. • **Columns Displayed by Default.** Includes all the fields that have display option set to Always (red asterisk) or By Default. Columns in this section are visible on the portlet (Displayed Column). Columns in this section appear in the portlet's normal and maximized view (Displayed Column). • **Columns Displayed by Default in Maximized View Only.** Columns in this section appear in the portlet's maximized view (Additional Columns Displayed in Maximized View). • **Columns Available for Display.** Columns in this section are available using the portlet's edit page (Available Column).
Add Column	Loads the Add Display Column screen in a separate window. This button is always enabled.
Edit	Loads the Edit Display Column screen in a separate window for the currently selected column. This button is enabled when a display column is selected.
Delete	Delete the selected column(s). This button is enabled when a display column is selected.
Arrange Data	This section determines how the data is arranged on the portlet.
Default Sort By	The column that is used to sort by default. This is a drop-down list displaying all column prompts that have User Sortable set to Yes.
Ascending	Sorts the column in ascending order. A radio button that toggles with Descending.
Descending	Sorts the column in a descending order. A radio button that toggles with Ascending.

Table 7-2. Set up Display Options page for list portlet fields and buttons

Field and Buttons	Description
Default Rows Displayed in Normal View	Indicates the default number of records displayed in a Normal view portlet. A numeric text field. The default is five.
Default Rows Displayed in Maximized View	Indicates the default number of records displayed in a maximized portlet. A numeric text field. The default is 50.

Bar Chart Page

This section lists and defines the sections, fields, charts, color source, and buttons of Set up Display Options page for bar chart portlets. *Figure 7-13* shows the Set up Display Options page for bar chart portlets. *Table 7-3* lists and defines the fields and buttons of the Set up Display Options page for bar chart portlets.

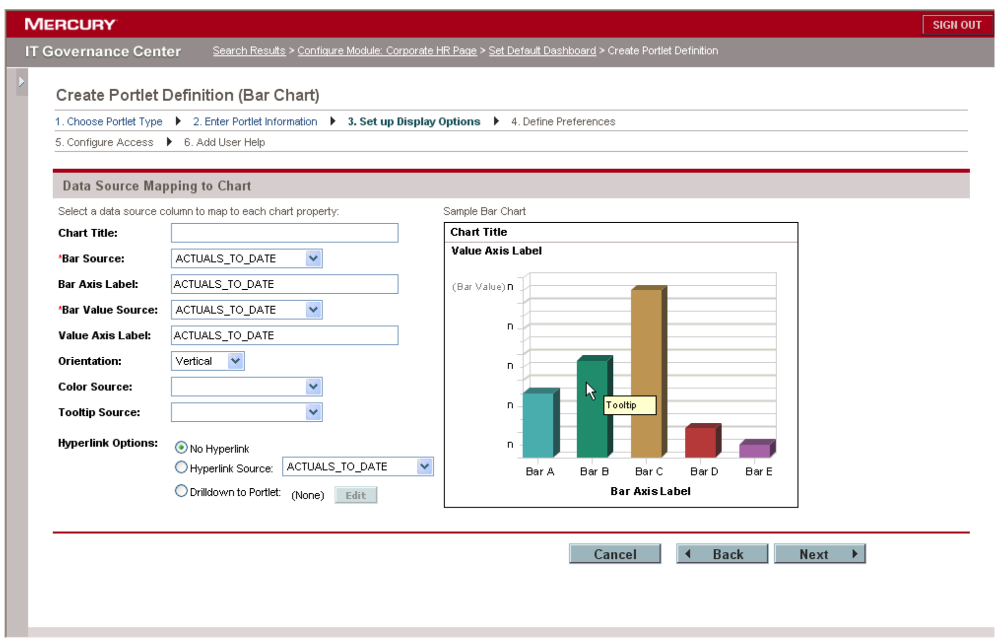


Figure 7-13. Set up Display Options page for bar chart portlets

Table 7-3. Set up Display Options page for bar chart portlets fields and buttons

Field and Buttons	Description
Data Source Mapping to Chart	This section contains all of the fields required to set up the display options for the chart.
Chart Title	The title of the chart.
Bar Source	This is the source column displaying the labels of each bar. This is a required drop-down list showing all of the columns from the data source.
Bar Axis Label	This is a static label that displays on the axis where Bar labels are displayed. This is a text field that defaults to the column name of the Bar Source column when the Bar Source is entered.
Bar Value Source	This is the source column which will determine the length of each bar. This is a required drop-down list showing all of the columns from the data source. This column must contain numeric data.
Value Axis Label	This is a static label that displays on the axis where Bar values are displayed. This is a text field that defaults to the column name of the Bar Value Source column when the Bar Value Source is entered.
Orientation	This field determines whether the bars will be displayed horizontally or vertically. This is a drop-down list with the values Vertical and Horizontal. The default is Vertical. Changing this value changes the orientation in the Sample Bar Chart field.
Color Source	This is the defined color group that will be displayed. This is a drop-down list showing all of the color groups from the data source.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.

Table 7-3. Set up Display Options page for bar chart portlets fields and buttons [continued]

Field and Buttons	Description
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. The drop-down list displays all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown had been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.
Sample Bar Chart	A sample chart with indication of where Bar, Bar Value, Bar-axis label, and Value-axis label will be shown.

Clustered Bar Chart

This section lists and defines the sections, fields, charts, color source, and buttons of Set up Display Options page for clustered bar chart portlets. *Figure 7-15* shows the Set up Display Options page for clustered bar chart portlets. *Table 7-5* lists and defines the fields and buttons of the Set up Display Options page for clustered bar chart portlets.

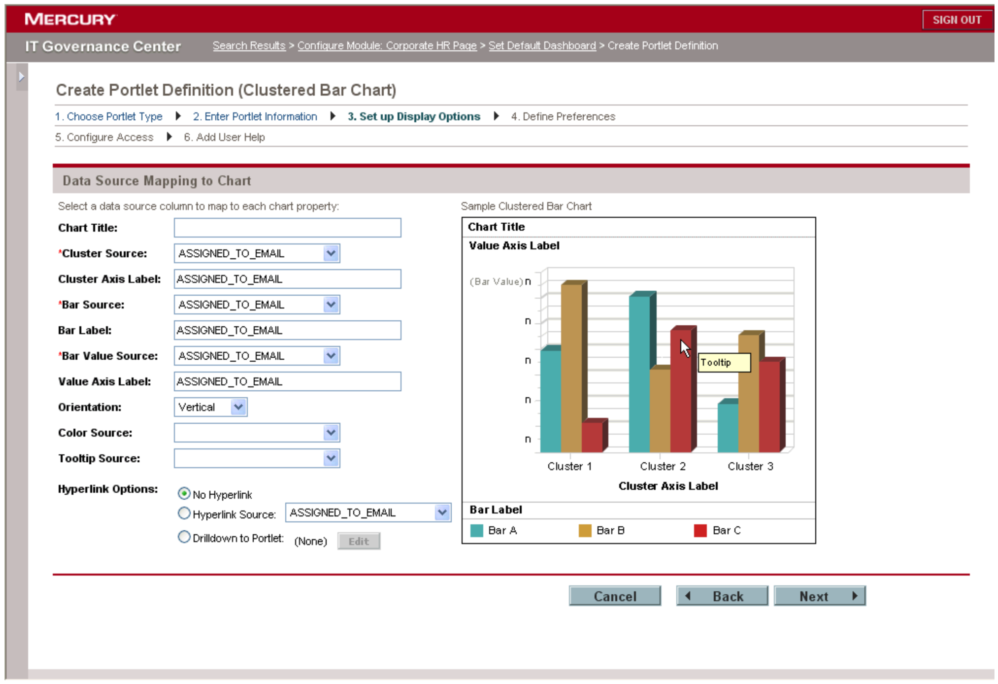


Figure 7-14. Set up Display Options page for clustered bar chart portlets

Table 7-4. Set up Display Options page for clustered bar chart portlets

Field and Buttons	Description
Data Source Mapping to Chart	This section contains all of the fields required to set up the display options for the chart.
Chart Title	The title of the chart.
Cluster Source	This is the cluster source column displaying the labels of each cluster. This is a required drop-down list showing all of the columns from the data source.
Cluster Axis Label	This is a static label that displays on the axis where cluster labels are displayed. This is a text field that defaults to the column name of the Cluster Source column when the Cluster Source is entered.
Bar Source	This is the source column displaying the labels of each bar. This is a required drop-down list showing all of the columns from the data source.
Bar Label	This is a static label that displays on the legend.

Table 7-4. Set up Display Options page for clustered bar chart portlets

Field and Buttons	Description
Bar Value Source	This is the source column which will determine the length of each bar. This is a required drop-down list showing all of the columns from the data source. This column must contain numeric data.
Value Axis Label	This is a static label that displays on the axis where Bar values are displayed. This is a text field that defaults to the column name of the Bar Value Source column when the Bar Value Source is entered.
Orientation	This field determines whether the bars will be displayed horizontally or vertically. This is a drop-down list with the values Vertical and Horizontal. The default is Vertical. Changing this value changes the orientation in the Sample Bar Chart field.
Color Source	This is the defined color group that will be displayed. This is a drop-down list showing all of the color groups from the data source.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. The drop-down list displays all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.
Sample Clustered Bar Chart	A sample chart.

Stacked Bar Chart Page

This section lists and defines the sections, fields, charts, color source, and buttons of the Set up Display Options page for stacked bar chart portlets. *Figure 7-15* shows the Set up Display Options page for stacked bar chart portlets. *Table 7-5* lists and defines the fields and buttons of the Set up Display Options page for stacked bar chart portlets.

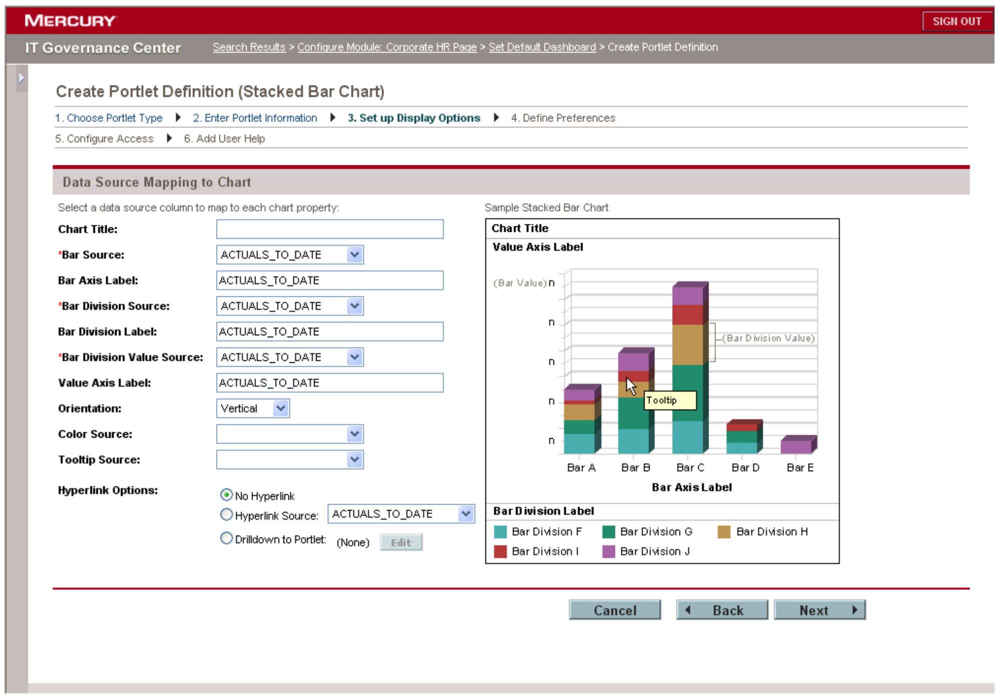


Figure 7-15. Set up Display Options page for stacked bar chart portlets

Table 7-5. Set up Display Options page for stacked bar chart portlets

Field and Buttons	Description
Data Source Mapping to Chart	This section contains all of the fields required to set up the display options for the chart.
Chart Title	The title of the chart.
Bar Source	This is the source column displaying the labels of each bar. This is a required drop-down list showing all of the columns from the data source.

Table 7-5. Set up Display Options page for stacked bar chart portlets

Field and Buttons	Description
Bar Axis Label	This is a static label that displays on the axis where Bar labels are displayed. This is a text field that defaults to the column name of the Bar Source column when the Bar Source is entered.
Bar Division Source	This is what each Bar division represents. This is a required drop-down list displaying all columns from the data source.
Bar Division Label	This is a static label for the Bar Divisions legend title. This is a text field that defaults to the column name of the Bar Division Source column when the Bar Division Source is entered.
Bar Division Value Source	This is the source column which will determine the value of each division of the bar. This is a required drop-down list displaying all of the columns from the data source.
Value Axis Label	This is a static label that displays on the axis where Bar values are displayed. This is a text field that defaults to the column name of the Bar Value Source column when the Bar Value Source is entered.
Orientation	This field determines whether the bars will be displayed horizontally or vertically. This is a drop-down list with the values Vertical and Horizontal. The default is Vertical. Changing this value changes the orientation in the Sample Bar Chart field.
Color Source	This is the defined color group that will be displayed. This is a drop-down list showing all of the color groups from the data source.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.

Table 7-5. Set up Display Options page for stacked bar chart portlets

Field and Buttons	Description
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. The drop-down list displays all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.
Sample Stacked Bar Chart	A sample chart with indication of where Bar label, Bar Division Value, Bar-axis label, and Value-axis label would be show.

Pie Chart Page

This section lists and defines the sections, fields, charts, color source, and buttons of Set up Display Options page for pie chart portlets. *Figure 7-16* shows the Set up Display Options page for pie chart portlets. *Table 7-6* lists and defines the fields and buttons of the Set up Display Options page for pie chart portlets.

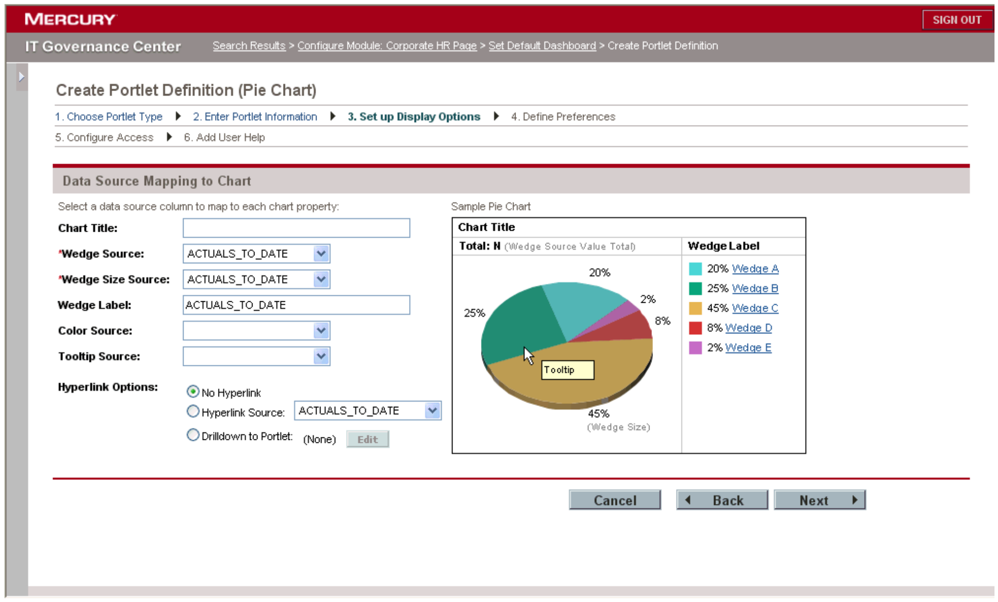


Figure 7-16. Set up Display Options page for pie chart portlets

Table 7-6. Set up Display Options page for pie chart portlets

Field and Buttons	Description
Data Source Mapping to Chart	This section contains all of the fields required to set up the display options for the chart.
Chart Title	The title of the chart.
Wedge Source	This is the source column that displays the legend label of each pie slice. This is a required drop-down list displaying all of the columns from the data source.
Wedge Size Source	This is the source column which will determine the size of each pie slice. This is a required drop-down list displaying all of the columns from the data source.
Wedge Label	This is a static label that is shown as the legend title for the wedges. This is a text field that defaults to the column name of the Wedge Slice column when its entered.
Color Source	This is the defined color group that will be displayed. This is a drop-down list showing all of the color groups from the data source.

Table 7-6. Set up Display Options page for pie chart portlets [continued]

Field and Buttons	Description
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. The drop-down list displays all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown had been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.
Sample Pie Chart	A sample chart with indication of where the label and wedge size would be shown.

Line Chart Page

This section lists and defines the sections, fields, charts, color source, and buttons of the Set up Display Options page for line chart portlets. *Figure 7-17* shows the Set up Display Options page for line chart portlets. *Table 7-7* lists and defines the fields and buttons of the Set up Display Options page for line chart portlets.

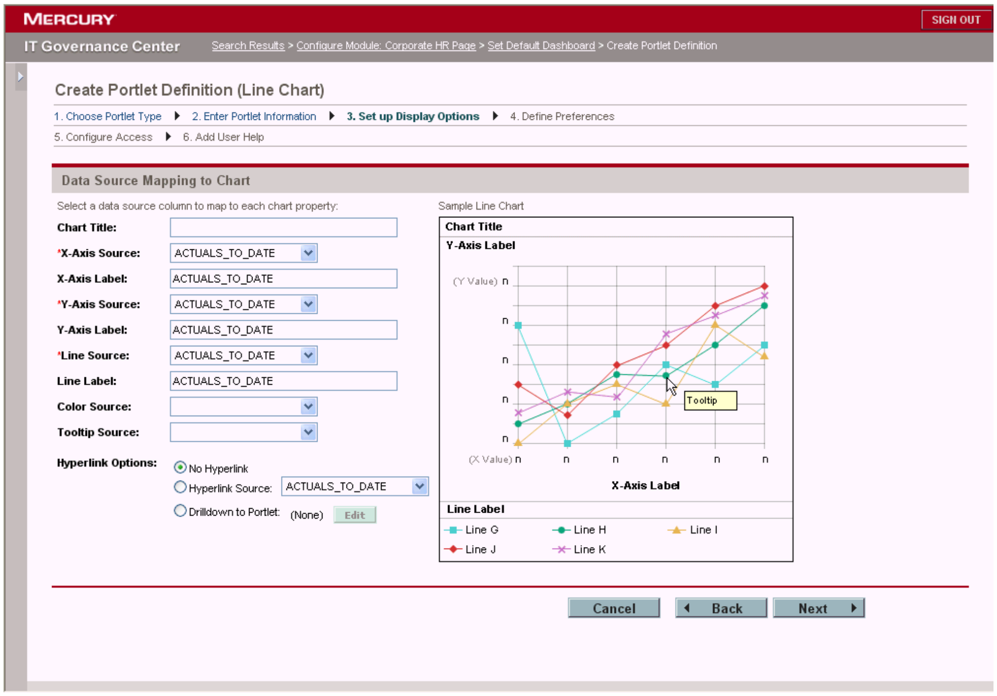


Figure 7-17. Set up Display Options page for line chart portlets

Table 7-7. Set up Display Options page for line chart portlets

Field and Buttons	Description
Data Source Mapping to Chart	This section contains all of the fields required to set up the display options for the chart.
Chart Title	The title of the chart.
X-Axis Label Source	This is the source column that will display the labels of dot on the line, for example, a date column. This is a required drop-down list displaying all of the columns from the data source.
X-Axis Label	This is a static label that displays on the x-axis. This is a text field that default to the column name of the X-Axis Source column when it is entered.
Y-Axis Source	This is the source column which will determine the value of each dot on the line. This is a required drop-down list displaying all of the columns from the data source.

Table 7-7. Set up Display Options page for line chart portlets [continued]

Field and Buttons	Description
Y-Axis Label	This is a static label that displays on the y-axis. This is a text field that default to the column name of the Y-Axis Source column when it is entered.
Line Source	This is the source column that will display the legend of each line. This is a required drop-down list displaying all of the columns from the data source.
Line Label	This is a static label that is shown as the legend title for the lines. This is a text field that defaults to the column name of the Line Source column when it is entered.
Color Source	This is the defined color group that will be displayed. This is a drop-down list showing all of the color groups from the data source.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. The drop-down list displays all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.
Sample Line Chart	A sample chart with indication of where the x-axis, line, y-zxis, x-and y-axis labels would be shown.

Bubble Chart Page

This section lists and defines the sections, fields, charts, color source, and buttons of the Set up Display Options page for bubble chart portlets. *Figure 7-18* shows the Set up Display Options page for bubble chart portlets. *Table 7-8* lists and defines the fields and buttons of the Set up Display Options page for bubble chart portlets.

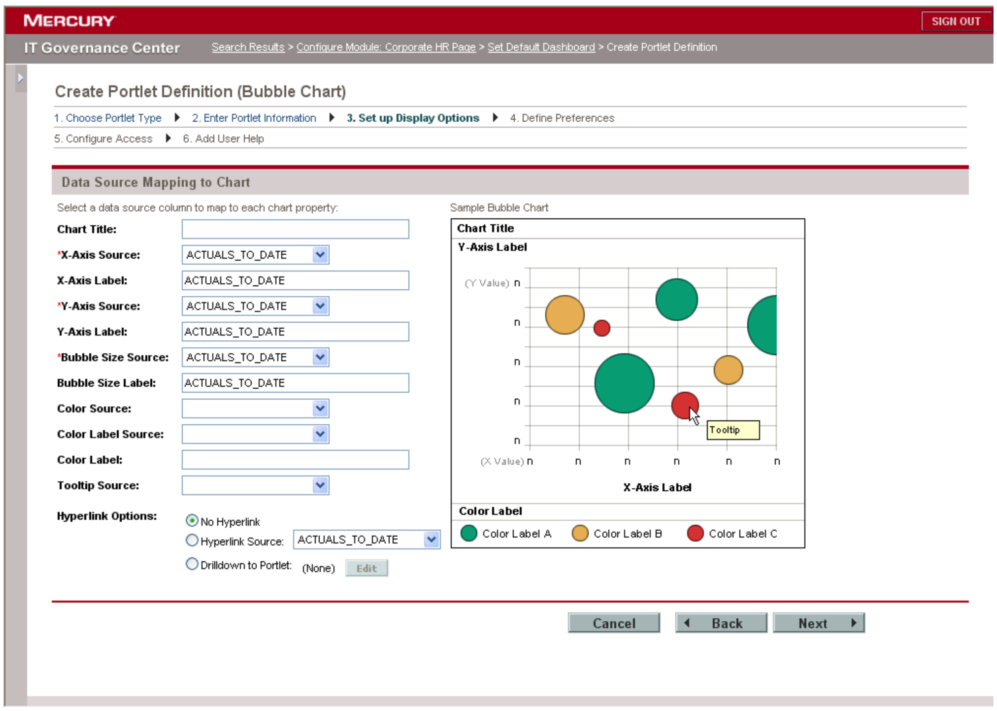


Figure 7-18. Set up Display Options page for bubble chart portlets

Table 7-8. Set up Display Options page for bubble chart portlets

Field and Buttons	Description
Data Source Mapping to Chart	This section contains all of the fields required to set up the display options for the chart.
Chart Title	The title of the chart.
X-Axis Source	This is the source column that will be used as the x-axis.
X-Axis Label	This is a static label that displays on the x-axis. This is a text field that default to the column name of the X-Axis Source column when it is entered.

Table 7-8. Set up Display Options page for bubble chart portlets

Field and Buttons	Description
Y-Axis Source	This is the source column that will be used as the y-axis.
Y-Axis Label	This is a static label that displays on the y-axis. This is a text field that default to the column name of the Y-Axis Source column when it is entered.
Bubble Size Source	This is the source column that displays the size of each bubble. This is a required drop-down list displaying all of the columns from the data source.
Bubble Size Label	This is a static label that displays the meaning of the bubble size. This is a text field that defaults to the column name selected in the Bubble Size source field.
Bubble Color Source	This is the source column that contains the color of each bubble. This is a drop-down list displaying all columns from the data source.
Bubble Color Label Source	This is the source column that displays the legend for each bubble color. This is a drop-down list displaying all columns from the data source.
Color Label	This is a static label that is shown as the legend title for the bubble colors. This is a text field that default to the column name of the Bubble Color Label Source column when it is entered.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.

Table 7-8. Set up Display Options page for bubble chart portlets

Field and Buttons	Description
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. The drop-down list displays all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.
Sample Bubble Chart	A sample chart with indication of where all the parameters will show up. This is a view-only chart.

Edit Display Column Pages

The Edit Display Column page is opened from the Set up Display Options page. The Edit Display Column page is different, depending on the column type chosen. This section details the fields and buttons of the different Edit Display Column pages for the different column types.

Text Column Type

This section lists and defines the sections, fields, and buttons of Edit Display Column page when the column type is text. *Figure 7-19* shows the Edit Display Column page when the column type is text. *Table 7-9* lists and defines the fields and buttons of the Edit Display Column page when the column type is text.

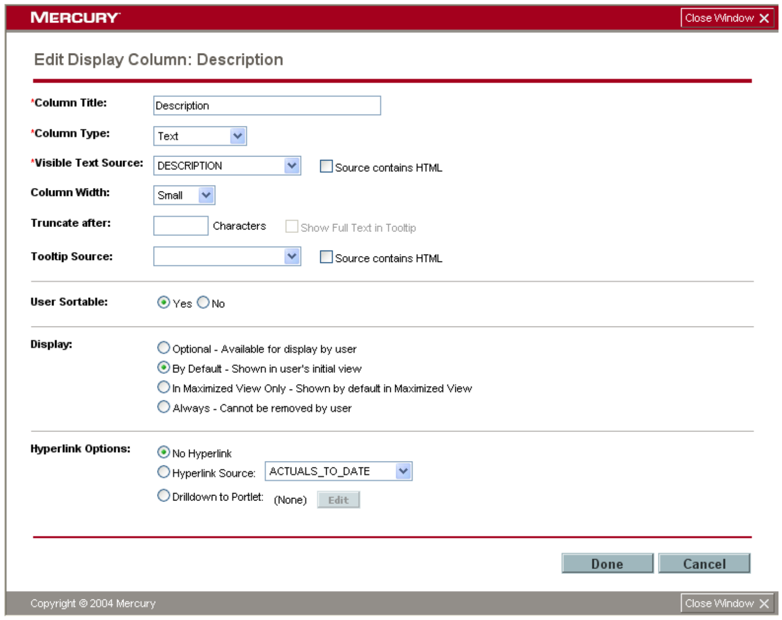


Figure 7-19. Edit Display Column page for text column types

Table 7-9. Edit Display Column page for text column types

Field and Buttons	Description
Column Title	The displayed column title in the portlet. This is a required text field.
Column Type	The type of the column. This is a required drop-down list. The column types are: Text, Text with Icon, Icon, and Progress Bar.
Visible Text Source	The data column that contains the information to display in the portlet. This is a required drop-down list of all of the columns from the data source. This field is only shown when the column type is Text or Text with Icon.
Source contains HTML	Selecting this option enables support for HTML in the Visible Text Source field. A checkbox. The default is deselected.
Column Width	The weight of column relative to each other. A drop-down list where the values are: Small, Medium, and Large. This field is visible only when the column type is Text or Text with Icon.

Table 7-9. Edit Display Column page for text column types [continued]

Field and Buttons	Description
Truncate After X characters	Allows users to set a limit on how many characters are shown in the column. This is a numeric text field. Only positive values (greater than zero) are allowed. This field is visible only when the column type is Text or Text with Icon.
Show Full Text in Tooltip	When a user chooses to truncate after X characters, this option will be available to show the full text in a tooltip. A checkbox whose default is deselected.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.
Source contains HTML	Selecting this option enables support for HTML in the Tooltip column. A checkbox. The default is deselected.
User Sortable	Controls whether the current column can be used for sorting purposes. This is a Yes/No radio button where only one value can be selected. The default is Yes.

Table 7-9. Edit Display Column page for text column types [continued]

Field and Buttons	Description
Display	Options for how the column should be displayed. This field contains a radio button group. The values are: • **Optional.** Selecting this option makes the column available to the user in the portlet's edit page (Available Column). • **By Default.** Selecting this option makes, by default, the column visible in the portlet (Displayed Column). • **In Maximized View Only.** Selecting this option makes, by default, the column visible in the portlets Maximized View only (Additional Columns Displayed in Maximized View). • **Always.** Selecting this option requires the column to be visible in the portlet (Displayed Column with asterisk). The default selected is By Default.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. This drop-down lists all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.

Text with Icon Column Type

This section lists and defines the sections, fields, and buttons of Edit Display Column page when the column type is text with icon. *Figure 7-20* shows the Edit Display Column page when the column type is text with icon. *Table 7-10* lists and defines the fields and buttons of the Edit Display Column page when the column type is text with icon.

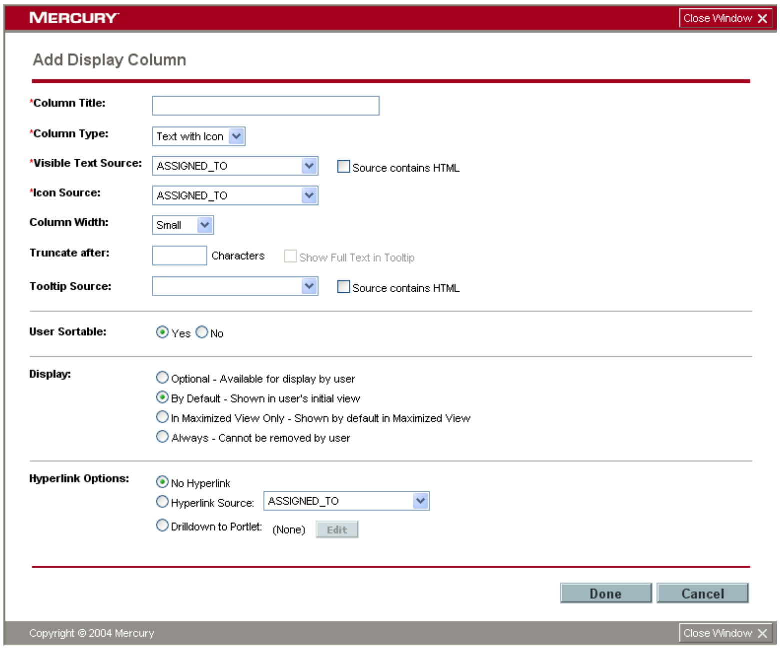


Figure 7-20. Edit Display Column page for text with icon column types

Table 7-10. Edit Display Column page for text with icon column types

Field and Buttons	Description
Column Title	The displayed column title in the portlet. This is a required text field.
Column Type	The type of the column. This is a required drop-down list. The column types are: Text, Text with Icon, Icon, and Progress Bar.
Visible Text Source	The data column that contains the information to display in the portlet. This is a required drop-down list of all of the columns from the data source. This field is only shown when the column type is Text or Text with Icon.

Table 7-10. Edit Display Column page for text with icon column types

Field and Buttons	Description
Source contains HTML	Selecting this option enables support for HTML in the Visible Text Source field. A checkbox. The default is deselected.
Icon Source	The data column containing the icons displayed in the portlet. This is a required drop-down list displaying all of the columns from the data source.
Column Width	The weight of column relative to each other. A drop-down list where the values are: Small, Medium, and Large. This field is visible only with the columns type is Text or Text with Icon.
Truncate After X characters	Allows users to set a limit on how many characters are shown in the column. This is a numeric text field. Only positive values (greater than zero) are allowed. This field is visible only when the column type is Text or Text with Icon.
Show Full Text in Tooltip	When a user chooses to truncate after X characters, this option will be available to show the full text in a tooltip. A checkbox whose default is deselected. This field is only enabled when a user enters a value into Truncate After X characters field. If this field is selected, the Tooltip Source column is disabled. This field is only shown when the column type is Text or Text with Icon.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.
Source contains HTML	Selecting this option enables support for HTML in the Tooltip column. A checkbox. The default is deselected.
User Sortable	Controls whether the current column can be used for sorting purposes. This is a Yes/No radio button where only one value can be selected. The default is Yes.

Table 7-10. Edit Display Column page for text with icon column types

Field and Buttons	Description
Display	Options for how the column should be displayed. This field contains a radio button group. The values are: • **Optional.** Selecting this option makes the column available to the user in the portlet's edit page (Available Column). • **By Default.** Selecting this option makes, by default, the column visible in the portlet (Displayed Column). • **In Maximized View Only.** Selecting this option makes, by default, the column visible in the portlets Maximized View only (Additional Columns Displayed in Maximized View). • **Always.** Selecting this option requires the column to be visible in the portlet (Displayed Column with asterisk). The default selected is By Default.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. This drop-down lists all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.

Icon Column Type

This section lists and defines the sections, fields, and buttons of the Edit Display Column page when the column type is icon. *Figure 7-21* shows the Edit Display Column page when the column type is Icon. *Table 7-11* lists and defines the fields and buttons of the Edit Display Column page when the column type is Icon.

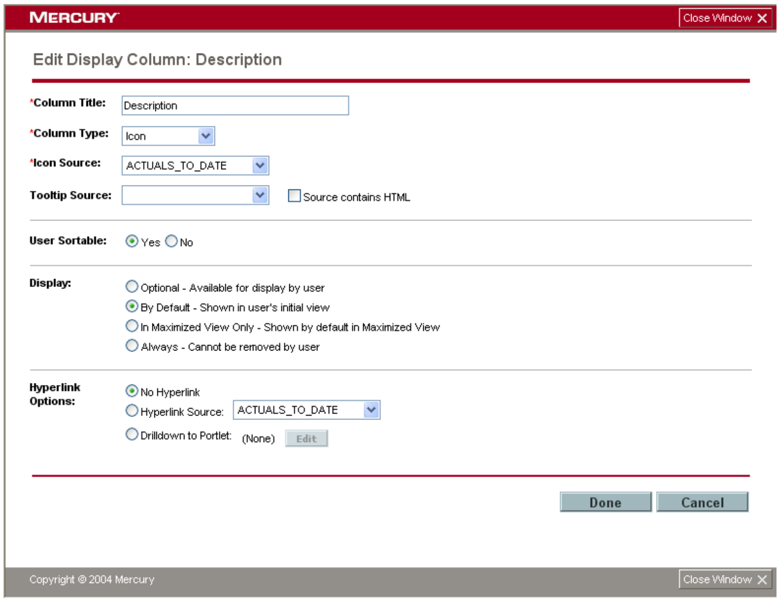


Figure 7-21. Edit Display Column page for Icon column types

Table 7-11. Edit Display Column page for icon column types

Field and Buttons	Description
Column Title	The displayed column title in the portlet. This is a required text field.
Column Type	The type of the column. This is a required drop-down list. The column types are: Text, Text with Icon, Icon, and Progress Bar.
Icon Source	The data column containing the icons displayed in the portlet. This is a required drop-down list displaying all of the columns from the data source.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.
Source contains HTML	Selecting this option enables support for HTML in the Tooltip column. A checkbox. The default is deselected.
User Sortable	Controls whether the current column can be used for sorting purposes. This is a Yes/No radio button where only one value can be selected. The default is Yes.

Table 7-11. Edit Display Column page for icon column types [continued]

Field and Buttons	Description
Display	Options for how the column should be displayed. This field contains a radio button group. The values are: • **Optional.** Selecting this option makes the column available to the user in the portlet's edit page (Available Column). • **By Default.** Selecting this option makes, by default, the column visible in the portlet (Displayed Column). • **In Maximized View Only.** Selecting this option makes, by default, the column visible in the portlets Maximized View only (Additional Columns Displayed in Maximized View). • **Always.** Selecting this option requires the column to be visible in the portlet (Displayed Column with asterisk). The default selected is By Default.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. This drop-down lists all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.

Progress Bar Column Type

This section lists and defines the sections, fields, and buttons of Edit Display Column page when the column type is progress bar. *Figure 7-22* shows the Edit Display Column page when the column type is Progress Bar. *Table 7-12* lists and defines the fields and buttons of the Edit Display Column page when the column type is Progress Bar.

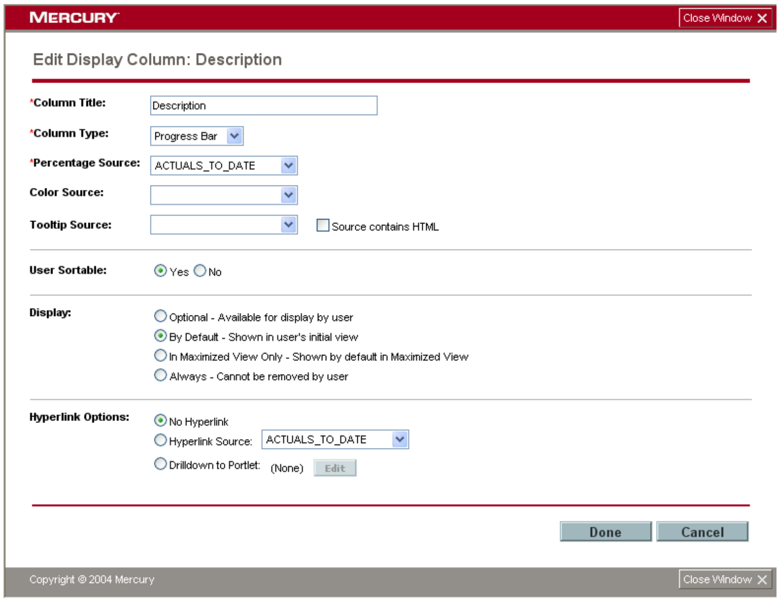


Figure 7-22. Edit Display Column page for progress bar column types

Table 7-12. Edit Display Column page for progress bar column types

Field and Buttons	Description
Column Title	The displayed column title in the portlet. This is a required text field.
Column Type	The type of the column. This is a required drop-down list. The column types are: Text, Text with Icon, Icon, and Progress Bar.
Percentage Source	The data column containing the percent complete information of the progress bar displayed in the portlet. The is a required drop-down list displaying all columns from the data source.
Color Source	The data column containing the color of the progress bar displayed in the portlet. The is a drop-down list displaying all columns from the data source.
Tooltip Source	This is the column of text that will be displayed when a cursor hovers over an item. This is a drop-down list showing all of the columns from the data source.
Source contains HTML	Selecting this option enables support for HTML in the Tooltip column. A checkbox. The default is deselected.

Table 7-12. Edit Display Column page for progress bar column types

Field and Buttons	Description
User Sortable	Controls whether the current column can be used for sorting purpose. This is a Yes/No radio button where only one value can be selected. The default is Yes.
Display	Options for how the column should be displayed. This field contains a radio button group. The values are: • **Optional.** Selecting this option makes the column available to the user in the portlet's edit page (Available Column). • **By Default.** Selecting this option makes, by default, the column visible in the portlet (Displayed Column). • **In Maximized View Only.** Selecting this option makes, by default, the column visible in the portlets Maximized View only (Additional Columns Displayed in Maximized View). • **Always.** Selecting this option requires the column to be visible in the portlet (Displayed Column with asterisk). The default selected is By Default.
Hyperlink Options	Indicates whether the column can be linked to another page or portlet. This field contains a radio button group. The values are: • **No Hyperlink** • **Hyperlink Source.** Selecting this option enables the drop-down list. This drop-down lists all of the columns from the data source. • **Drilldown to Portlet.** Selecting this option enables the Edit button. Clicking Edit displays the Edit Drilldown page. After the drilldown has been defined, the Drill-to Portlet Name will be displayed instead of None. The default is No Hyperlink.

Chapter

8

Configuring Portlet Definitions

In This Chapter:

Overview of Configuring Portlet Definitions

Configuring a portlet definition refers to deleting, copying, or editing an existing portlet definition. Configuring a portlet definition requires the Portlet Definition wizard and an existing portlet definition. Portlet definitions can include:

- Portlet definitions created by the Portlet Definition wizard
- Java portlet definitions imported by the Portlet Definition wizard
- WSRP portlet definitions imported by the Portlet Definition wizard

Figure 8-1 illustrates the steps required to configure a portlet definition.

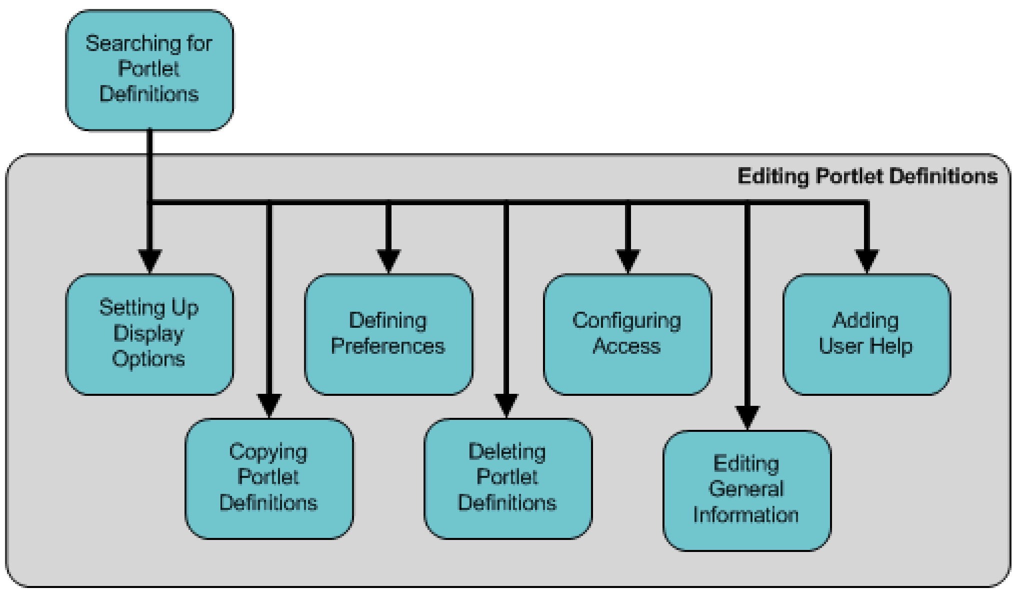


Figure 8-1. Configure a portlet definition process

The following steps are required to configure a portlet definition. There are two steps in configuring a portlet definition:

- **Step One: Search for Portlet Definitions.** Search for and select a portlet definition.
- **Step Two: Edit Portlet Definitions.** Make changes to the portlet definition. Making changes to the portlet definition might include copying the portlet definition, deleting the portlet definition, or making changes to the existing portlet definition.

Here are some brief explanations of tasks that you may need to complete when you edit the portlet definitions.

- **Copying Portlet Definitions.** Clicking the **Copy** button copies the existing portlet definition. Enter a new name for the copied portlet definition.
- **Deleting Portlet Definitions.** Clicking the **Delete** button deletes the existing portlet definition.
- **Editing General Information.** At the top of the Configure Portlet Definition page, several of the fields can be updated with new data.
- **Setting up Display Options.** Selecting this **Display** tab redefines the display of the portlet, such as redefining the columns of a list portlet or redefining the wedges of a pie chart portlet.
- **Defining Preferences.** Selecting the **Preference Fields** tab redefines the portlet's preferences. A portlet's preferences are found on a portlet's edit page and are used to personalize the portlet.
- **Configuring Access.** Selecting the **Access** tab redefines the portlet definition's access permissions.
- **Adding User Help.** Selecting the **User Help** tab redefines the portlet definition's user help information.

Configuring Portlet Definitions: Special Cases

This section provides information concerning special case considerations when configuring portlet definitions.

Configuring Mercury-Supplied Portlet Definitions

Mercury IT Governance Center applications, such as Mercury IT Governance Portfolio Management™ and Mercury IT Governance Demand Management™, come with Mercury-supplied portlet definitions. Portlet definitions belonging to one or more of the Mercury IT Governance Center applications can be configured in one of the following ways:

- Copying portlet definitions
- Configuring access
- Adding user help

Portlet definitions belonging to any of the Mercury IT Governance Center applications cannot be deleted. Additionally, portlet definitions belonging to any of the Mercury IT Governance Center applications cannot have their displays or preferences changed, configured, or edited in any way.

Configuring Imported Portlet Definitions

Some portlet definitions might be imported portlet definitions, such as Java portlets and WSRP portlets. Imported portlet definitions can be configured in one or more of the following ways:

- Configuring access
- Editing general information
- Deleting portlet definitions

Configuring Mercury-Supplied Imported Portlet Definitions

Mercury IT Governance Center applications, such as Mercury IT Governance Portfolio Management and Mercury IT Governance Demand Management, come with Mercury-supplied portlet definitions. Some of those portlet definitions might be imported portlet definitions, such as Java portlets and WSRP portlets. Imported portlet definitions belonging to any of the Mercury IT Governance Center applications can be configured in one of the following ways:

- Configuring access
- Editing general information, setting the timeout

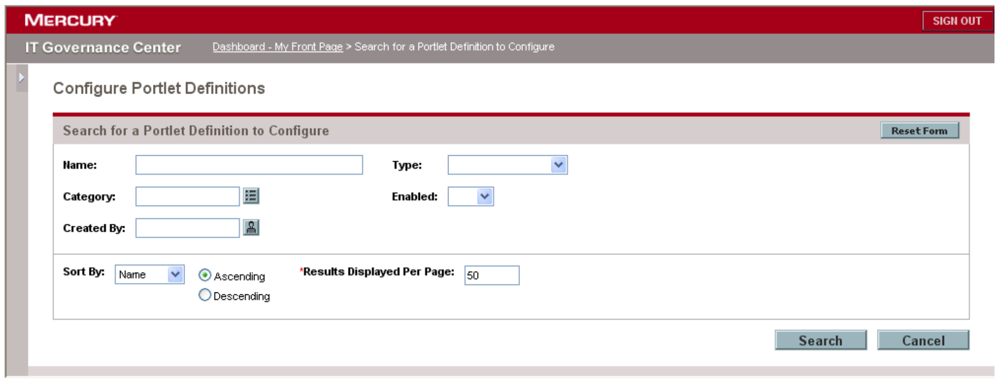
Opening the Portlet Definition Wizard

This section details the steps required to open the Portlet Definition wizard. The Portlet Definition wizard is used to configure a portlet definition.

To open the portlet definition wizard:

1. Log on to the standard interface.
2. From the menu bar, select **Administration > Portlet Definitions > Configure Portlet Definitions.**

The Portlet Definition wizard appears. The first page of the Portlet Definition wizard is Search for a Portlet Definition to Configure. For more information concerning the Search for a Portlet Definition to Configure page, see the next section (*Searching for Portlet Definitions*).

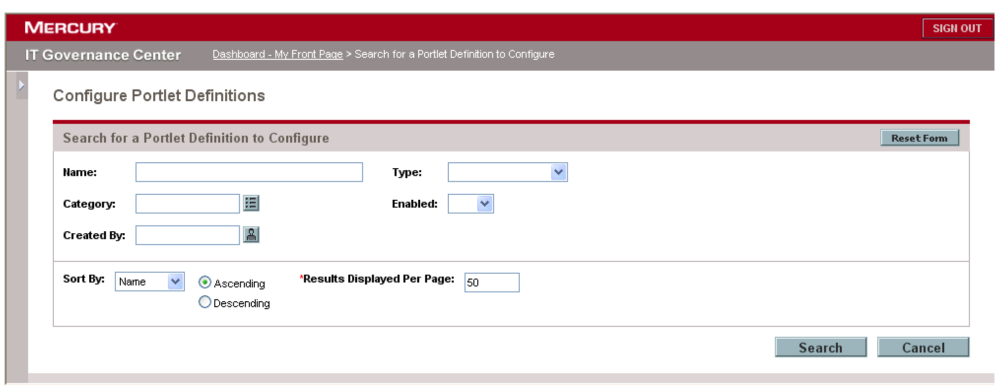


Searching for Portlet Definitions

The Search for a Portlet Definition to Configure page is the first page available when configuring a portlet definition using the Portlet Definition wizard. The Search for a Portlet Definition to Configure page is a search page. Enter specific search criteria in the fields of the Search for a Portlet Definition to Configure page.

To search for a portlet definition:

1. On the Search for a Portlet Definition to Configure page, enter the search criteria to find a portlet definition.



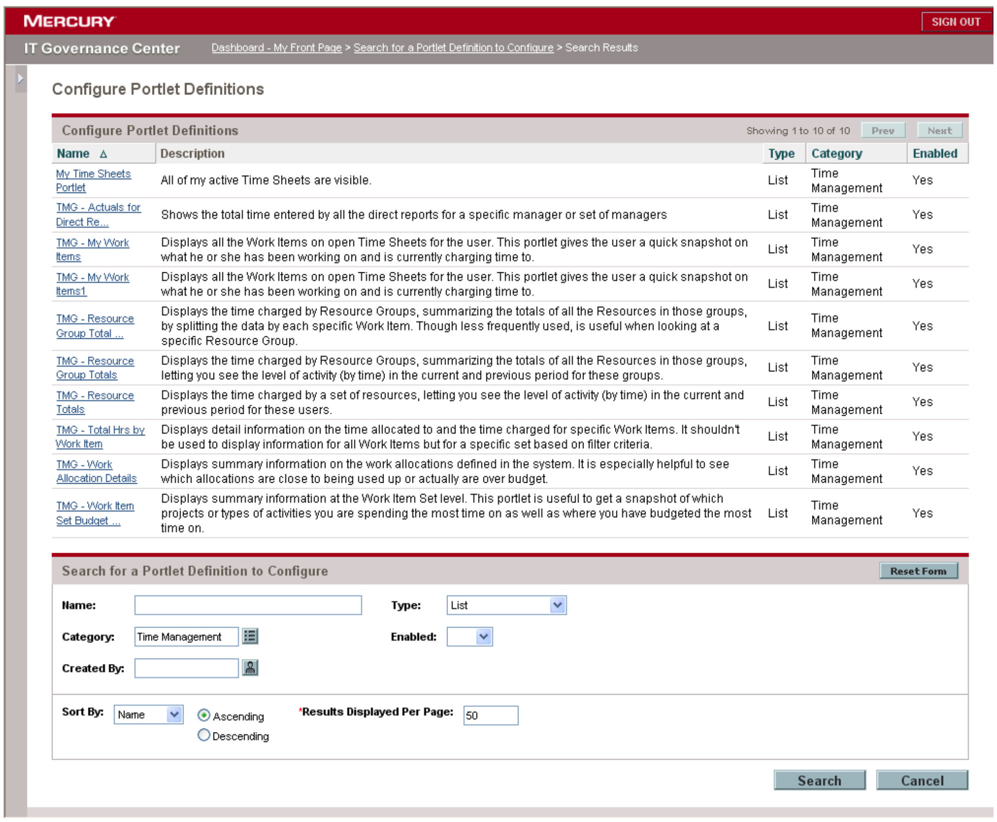
See the following for a list of the fields and definitions of the Search for a Portlet Definition to Configure page.

Field	Definition
Name	The name of the portlet. A text field. Entering partial name of the portlet definition should yield all matching results.
Category	Filter field for the portlet category. A multi-select auto-complete field. Resulting portlet definitions will have to have a category that matches one of the values entered in this field.
Created By	Filter field for who created the portlet definition. A user auto-complete field.
Type	Filter field for the type of portlet definition. drop-down list with all portlet types, including: • List Chart • Bar Chart • Stacked Bar Chart • Clustered Bar Chart • Pie Chart • Line Chart • Bubble Chart • Java Portlet • WSRP Portlet
Enabled	Filtering on whether a portlet definition is enabled. A drop-down list displaying Yes and No.
Sort By	Columns that user can use for sorting the search results. A drop-down list of the fields in the Search for a Portlet Definition to Configure page.
Results Displayed Per Page	Sets how many portlet definitions are going to be displayed in the results page. A numeric text field. The default is 50.

2. At the bottom of the Search for a Portlet Definition to Configure page, click **Search.** The Configure Portlet Definitions page is returned with a list of portlet definitions matching your search criteria.

   - Refine your search by editing the fields in the Search for a Portlet Definition to Configure section and clicking **Search**.

   - Select one of the listed portlet definitions. The portlet definition's edit page is returned.



Editing Portlet Definitions

This section details how to configure portlet definitions. Configuring portlet definitions refers to changing the information on an existing portlet definition. Configuring portlet definitions also refers to copying an existing portlet definition and deleting an existing portlet definition.

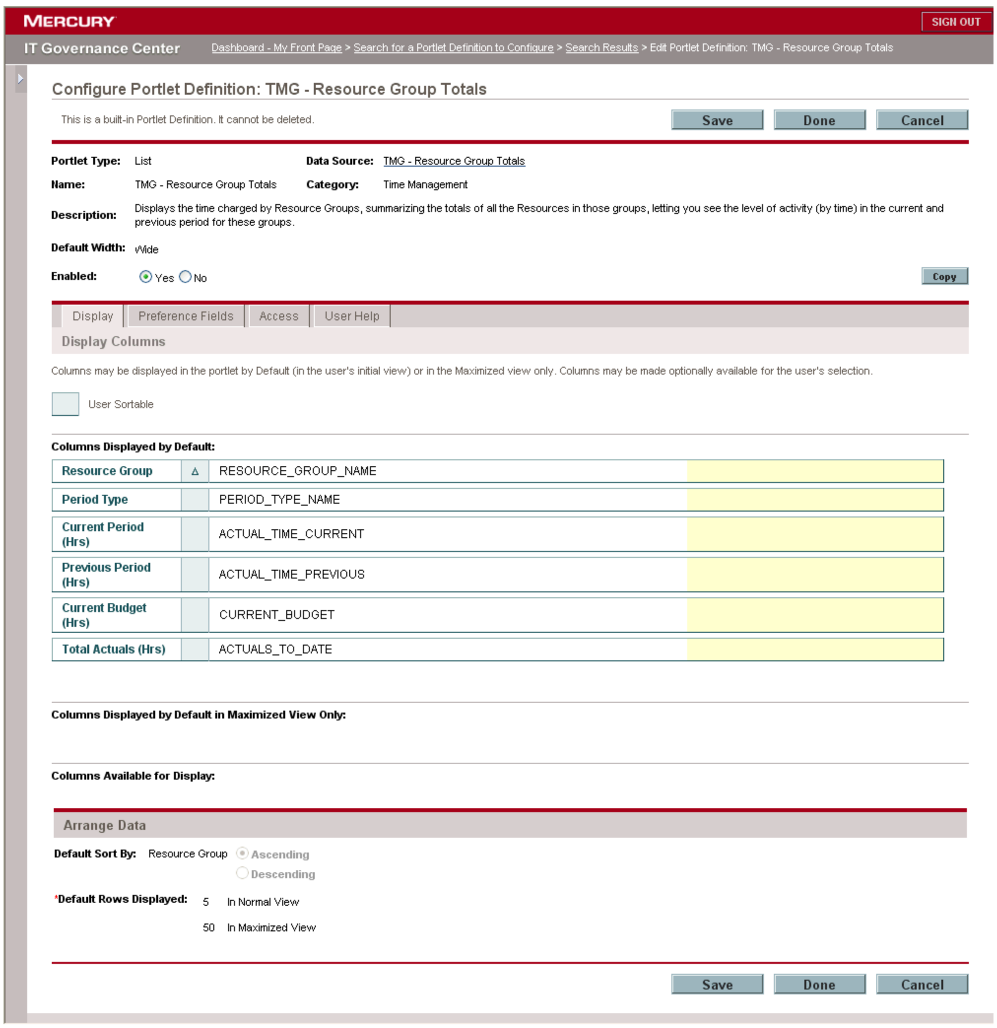


Figure 8-2. Configure Portlet Definition page

Copying a Portlet Definition

This section details the steps required to copy an existing portlet definition. Java portlets and WSRP portlets cannot be copied.

To copy a portlet definition:

1. From the standard interface, on the menu bar, click **Administration > Portlet Definitions > Configure Portlet Definitions.**

   The Search for a Portlet Definition to Configure page appears.

2. Select an existing portlet definition.

   See *Searching for Portlet Definitions* for instructions on how to select an existing portlet definition.

3. From the Copy Portlet Definition page, click **Copy.**

   A copy is made of the existing portlet. The copied portlet stays in the browser window.

4. At the top of the Copy Portlet Definition page, enter the new portlet definition information.

   See the following for a list of the fields and definitions at the top of the Configure Portlet Definition page.

Fields and Buttons	Definition
Portlet Type	The type of the portlet definition. This field cannot be edited.
Data Source	The data source defined for the current portlet, which should include columns to display and preferences fields. This field cannot be edited.
Name	Name of the portlet definition. This is a required text field. The maximum length is 80 characters.
Category	Functional categories of the portlet, should be used to make searching portlets easier. This is a multi-select auto-complete field.
Description	Description of the portlet definition. This is a text field. The maximum length is 1800 characters. It can be helpful to describe the main function of the portlet, such as Showing Projects for a desired Program.

Fields and Buttons	Definition
Default Width	Sets the default of the portlet to be wide or narrow. A drop-down list display narrow and wide.
Enabled	Indicates whether the portlet can be added to end-users' Dashboards. A Yes/No radio button.
Manage Categories	Displays Manage Categories page in a separate window.
Copy	Copies the current portlet definition by loading up a similar page with *Copy Portlet Definition: <Portlet Definition Name>* title, and **Create** button instead of **Save** and **Done.** Only enabled for builder portlets, not for Java portlets or WSRP portlets.
Delete	Confirm with a pop-up window first, and delete accordingly. After deletion, go back to the previous navigation path, or Dashboard home page if no navigation path found. Disabled for built-in portlet definitions.

5. At the bottom of the Copy Portlet Definition page, click **Done.**

   Clicking **Done** saves the changes made in the portlet definition. If possible, the previous page is returned. If the previous page is not available, the browser displays the first Dashboard page. Clicking **Save** saves the changes made to the portlet definition in this session, and shows a Successfully Saved at a:bb:cc am/pm stamp on top of the same page. Clicking **Cancel** discards the changes made to the portlet definition in this session. If possible, the previous page is returned.

Deleting a Portlet Definition

This section details the steps required to delete an existing portlet definition.

To delete a portlet definition:

1. From the standard interface, on the menu bar, click **Administration > Portlet Definitions > Configure Portlet Definitions.**

   The Search for a Portlet Definition to Configure page appears.

2. Select an existing portlet definition.

   See *Searching for Portlet Definitions* for instructions on how to select an existing portlet definition.

3. From the Configure Portlet Definition page, click **Delete.**

4. At the bottom of the Configure Portlet Definition page, click **Done.**

   Clicking **Done** saves the changes made in the portlet definition. If possible, the previous page is returned. If the previous page is not available, the browser displays the first Dashboard page. Clicking **Save** saves the changes made to the portlet definition in this session, and shows a Successfully Saved at a:bb:cc am/pm stamp on top of the same page. Clicking **Cancel** discards the changes made to the portlet definition in this session. If possible, the previous page is returned.

Editing the General Information

This section details the steps required to edit the general information at the top of an existing portlet definition.

To edit a portlet definition:

1. From the standard interface, on the menu bar, click **Administration > Portlet Definitions > Configure Portlet Definitions.**

   The Search for a Portlet Definition to Configure page appears.

2. Select an existing portlet definition.

   See *Searching for Portlet Definitions* for instructions on how to select an existing portlet definition.

3. At the top of the Configure Portlet Definition page, enter the new portlet definition information.

   See the following for fields and buttons definitions at the top of the Configure Portlet Definition page.

Fields and Buttons	Definition
Portlet Type	The type of the portlet definition. This field cannot be edited.
Data Source	The data source defined for the current portlet, which should include columns to display and preferences fields. This field cannot be edited.
Name	Name of the portlet definition. This is a required text field. The maximum length is 80 characters.
Category	Functional categories of the portlet, should be used to make searching portlets easier. This is a multi-select auto-complete field.
Description	Description of the portlet definition. This is a text field. The maximum length is 1800 characters. It can be helpful to describe the main function of the portlet, such as *Showing Projects for a desired Program*.
Default Width	Sets the default of the portlet to be wide or narrow. A drop-down list display narrow and wide.
Enabled	Indicates whether the portlet can be added to end-users' Dashboards. A Yes/No radio button.
Manage Categories	The **Manage Category** button. Clicking the **Manage Category** button displays the Manage Categories page. Use the Manage Categories page to add or delete portlet categories. For more information concerning the Manage Categories page, see *Managing Portlet Categories*.

4. At the bottom of the Configure Portlet Definition page, click **Done.**

   Clicking **Done** saves the changes made in the portlet definition. If possible, the previous page is returned. If the previous page is not available, the browser displays the first Dashboard page. Clicking **Save** saves the changes made to the portlet definition in this session, and shows a Successfully Saved at a:bb:cc am/pm stamp on top of the same page. Clicking **Cancel** discards the changes made to the portlet definition in this session. If possible, the previous page is returned.

Managing Portlet Categories

This section covers how to manage portlet categories. Portlet categories define a entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet makes a portlet easier to find. Use the Manage Categories page to add or delete portlet categories.

Adding a portlet category requires the Manage Categories page (see *Figure 8-3*). The Manage Categories page is accessed from the Enter Portlet Information page or the Configure Portlet Definition page.

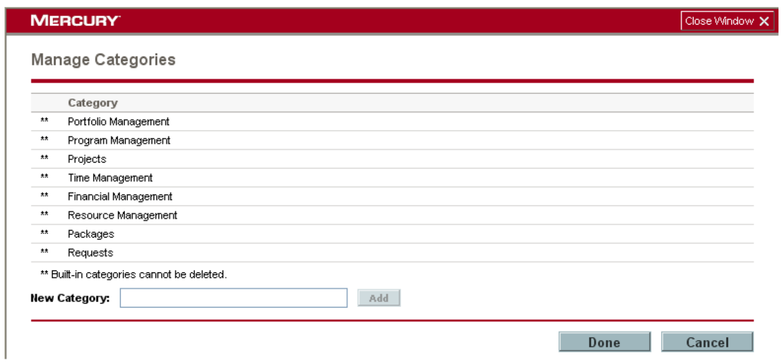


Figure 8-3. Manage Categories page

For More Information

For more information on how to manage portlet categories, see *Managing Portlet Categories* on page 86.

Setting up the Display Options

The Display tab is used to set up the display of the portlet's data. Portlet data can be set up to display the columns of a list portlet, or the bars, wedges, lines, or bubbles of a chart portlet. The Display tab also defines how to arrange the portlet's data. *Figure 8-4* shows the Display tab.

The sections and fields of the Display tab varies depending on the portlet type. The following list outlines the sections of the Display tab:

- **Display Columns.** The fields and buttons in this section add, edit, and delete the portlet's columns.
- **Arrange Data.** The fields in this section set the default values for the data. When personalizing the portlet, you can override the default values set in this section.

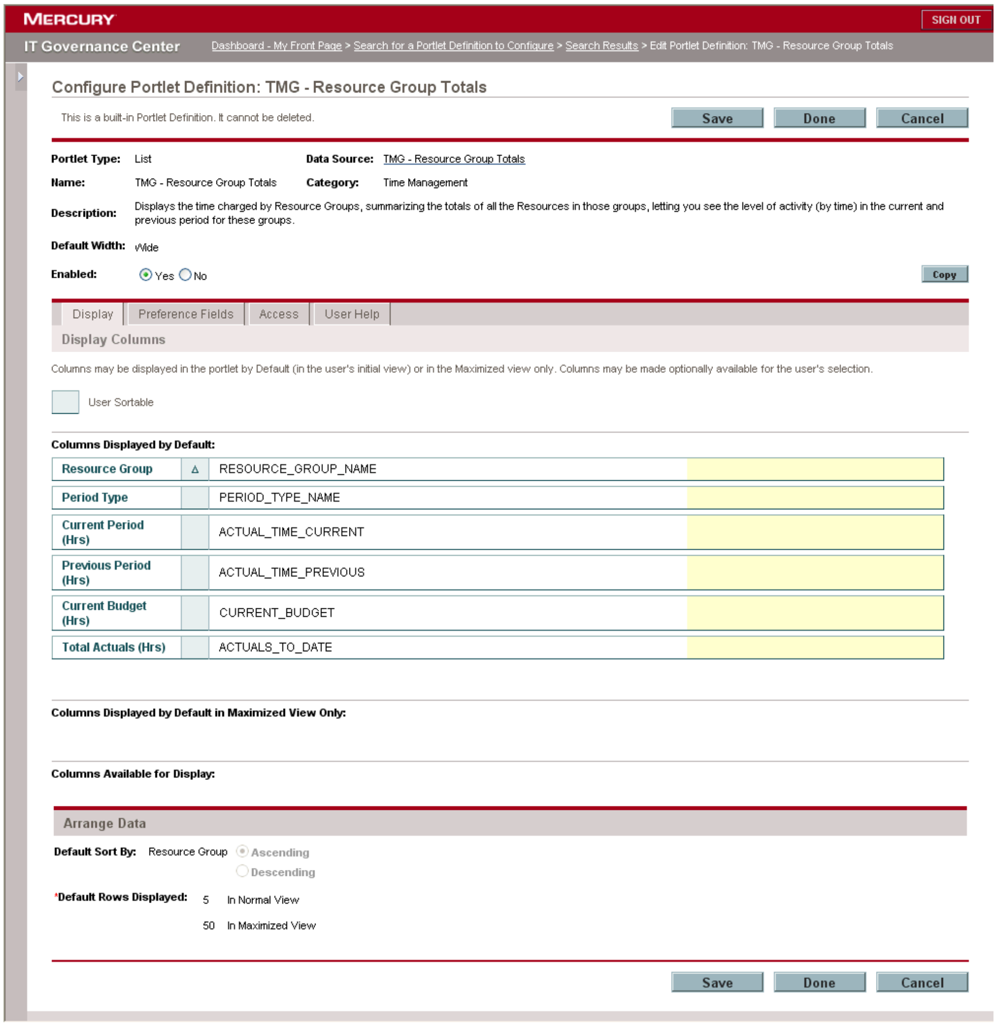


Figure 8-4. Display tab

To open the display tab:

1. From the standard interface, on the menu bar, click **Administration > Portlet Definitions > Configure Portlet Definitions.**

   The Search for a Portlet Definition to Configure page appears.

2. Select an existing portlet definition.

   See *Searching for Portlet Definitions* for instructions on how to select an existing portlet definition.

3. On the Configure Portlet Definition page, click the **Display** tab.

   The **Display** tab appears.

4. Complete the sections of the **Display** tab.

   For information on how to complete the sections of the **Display** tab, see *Step Three: Set Up the Display Options* on page 88.

5. From the bottom of the **Display** tab, click **Done.**

   Clicking **Done** saves the changes made in the portlet definition.

Defining Preferences

The **Preference Fields** tab is where you can decide which preference fields should be displayed and how they are laid out (in the Preferences section of the portlet's edit page).

Initially, all preference fields are mapped from data source, which indicates the name of the field, type of the field, and list of values in the case of a drop-down field or auto-complete field. The administrators can then hide fields, set default values, or lay out the fields. *Figure 8-5* shows the **Preference Fields** tab.

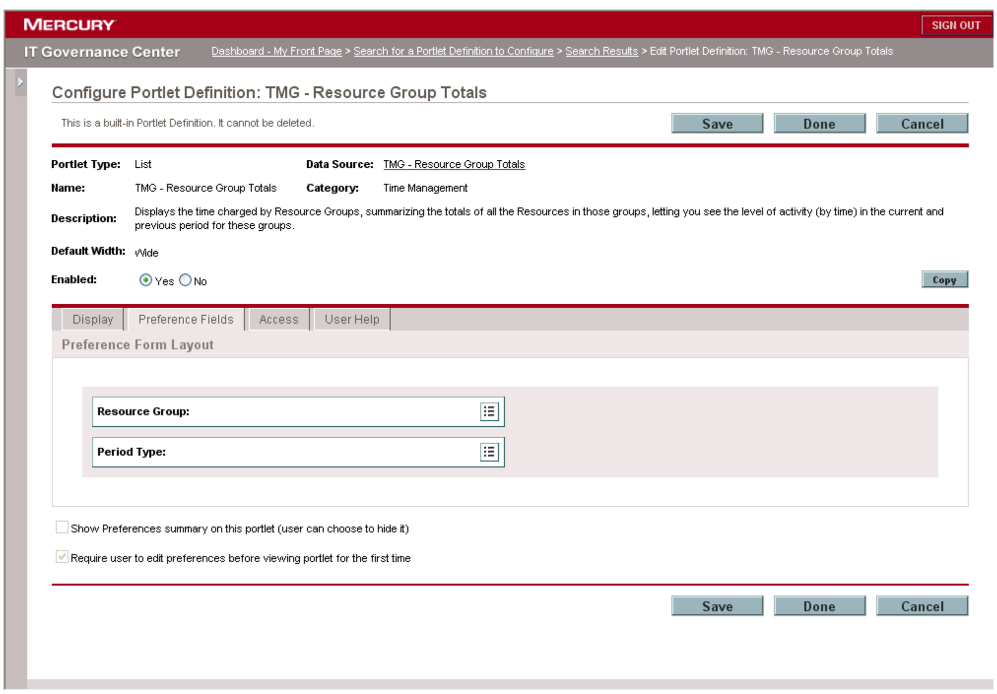


Figure 8-5. Preference Fields tab

To open the preference fields:

1. From the standard interface, on the menu bar, click **Administration > Portlet Definitions > Configure Portlet Definitions.**

   The Search for a Portlet Definition to Configure page appears.

2. Select an existing portlet definition.

   See *Searching for Portlet Definitions* for instructions on how to select an existing portlet definition.

3. On the Configure Portlet Definition page, click the **Preference Fields** tab.

   The **Preference Fields** tab appears.

4. Complete the sections of the **Preference Fields** tab.

   For information on how to complete the sections of the **Preference Fields** tab, see *Step Four: Define Preferences* on page 98.

5. At the bottom of the **Preference Fields** tab, click **Done.**

   Clicking **Done** saves the changes made in the portlet definition.

Configuring Access

The **Access** tab allows administrators to set up the user and group access to the portlet. The following lists the sections of the **Access** tab include:

- **User Access.** This section controls which users or group of users can add this portlet to their Dashboards.
- **Administrator Access.** This section controls what users or group of users can configure this portlet definition after the definition has been created. Note that the specified users still need privilege Configure Portlet Definitions in order to configure a portlet definition.
- **WSRP Access.** This section makes the portlet available to WSRP consumers.

Initially, access to a portlet definition is given to all users in User Access or all administrators in Administrator Access. If the application administrator removes all securities from the list, then the portlet definition returns to initial access, which is either to all users in User Access or all administrators in Administrator Access. *Figure 8-6* shows the **Access** tab.

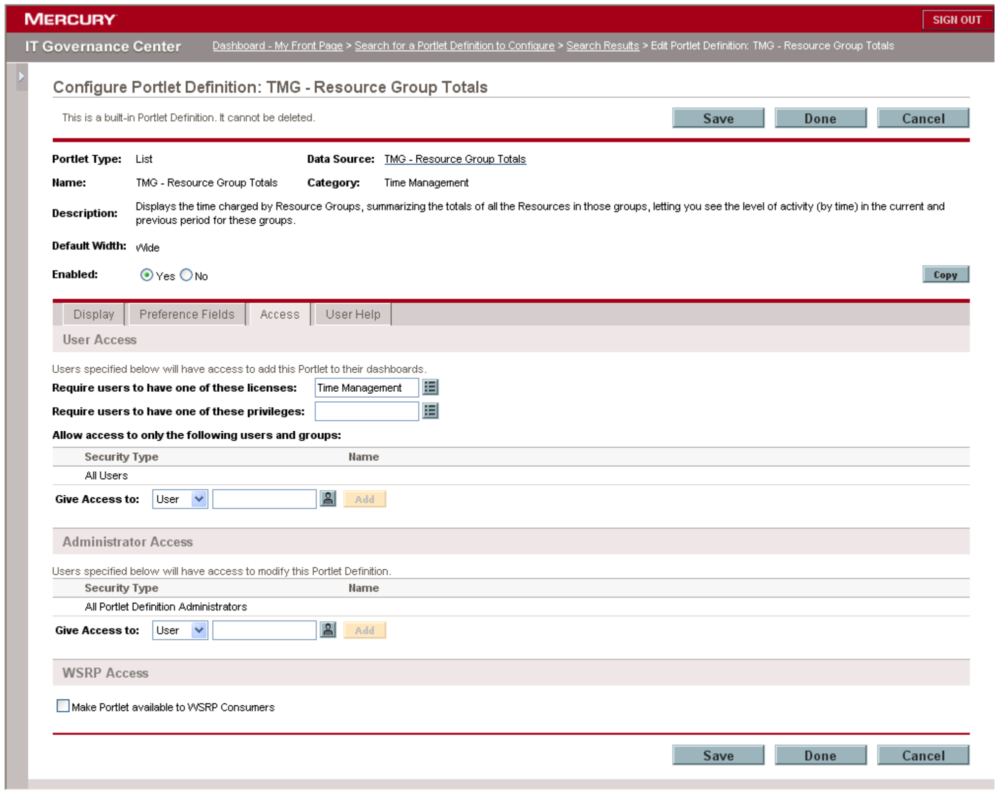


Figure 8-6. Access tab

To open the access tab:

1. From the standard interface, on the menu bar, click **Administration > Portlet Definitions > Configure Portlet Definitions.**

   The Search for a Portlet Definition to Configure page appears.

2. Select an existing portlet definition.

   See *Searching for Portlet Definitions* for instructions on how to select an existing portlet definition.

3. On the Configure Portlet Definition page, click the **Access** tab.

   The **Access** tab appears.

4. Complete the sections of the **Access** tab.

   For information on how to complete the sections of the **Access** tab, see *Step Five: Configure Access* on page 102.

5. From the bottom of the **Access** tab, click **Done.**

   Clicking **Done** saves the changes made in the portlet definition.

Adding User Help

The **User Help** tab contains a text area for you to define the portlet and fields. This will help the portlet user to better understand what this portlet does. The text defined here will be displayed in Portlet Help on the Dashboard. *Figure 8-7* shows the **User Help** tab.

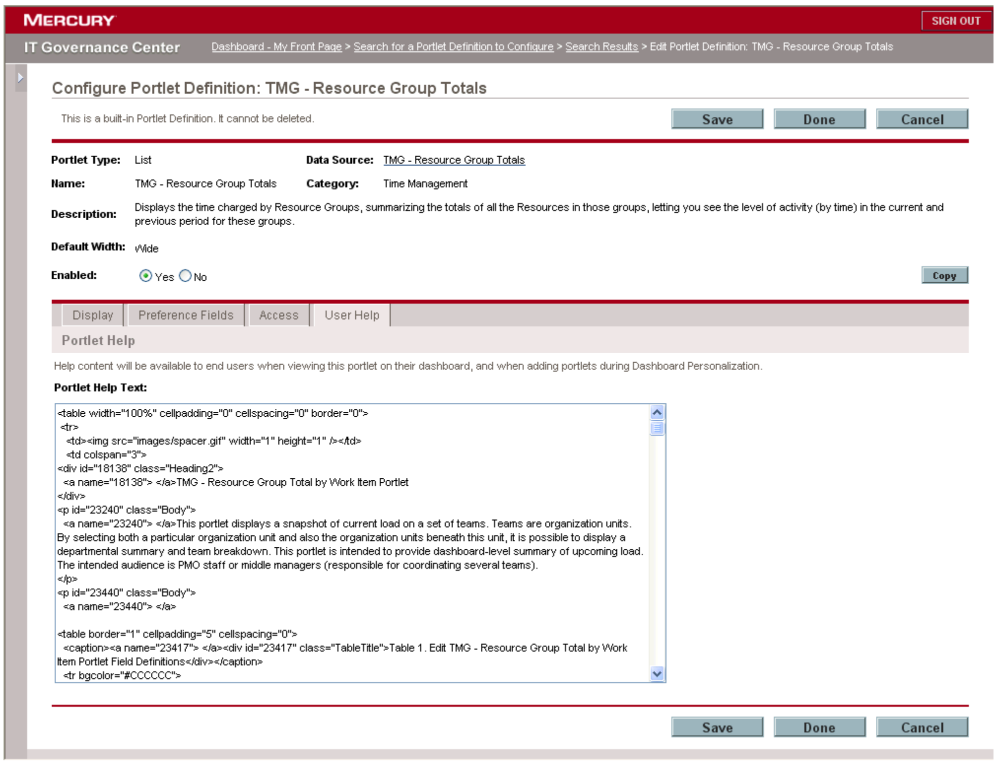


Figure 8-7. User Help tab

To open the user help tab:

1. From the standard interface, on the menu bar, click **Administration > Portlet Definitions > Configure Portlet Definitions.**

   The Search for a Portlet Definition to Configure page appears.

2. Select an existing portlet definition.

   See *Searching for Portlet Definitions* for instructions on how to select an existing portlet definition.

3. On the Configure Portlet Definition page, click the **Portlet Help** tab.

   The **Portlet Help** tab appears.

4. On the **Portlet Help** tab, in the Portlet Help field, enter the help text.

   The Portlet Help Text field supports HTML. Enter the HTML code that defines the functionality of the portlet and lists and describes all of the portlet fields.

5. From the bottom of the **Portlet Help** tab, click **Done.**

   Clicking **Done** saves the changes made in the portlet definition.

Chapter

9

Importing Portlet Definitions

In This Chapter:

Overview of Importing Portlet Definitions

Java and WSRP portlet definitions can be imported into the system using the Import a Portlet Definition wizard. Once imported, portlet definitions can be configured and added to Dashboard pages. *Figure 9-1* illustrates the import process for Java and WSRP portlet definitions.

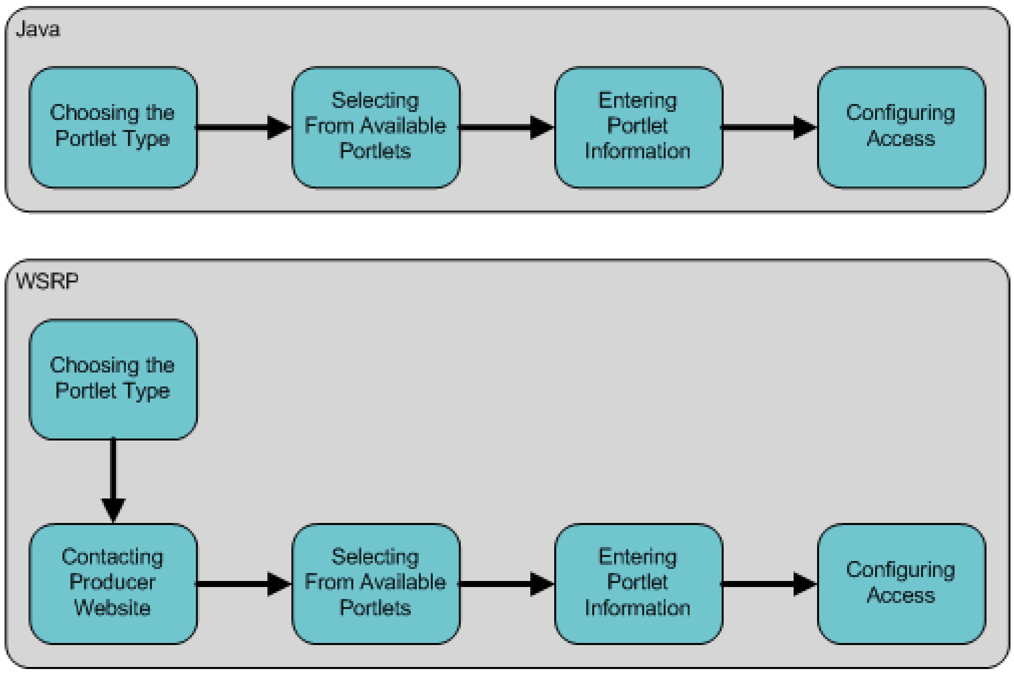


Figure 9-1. Import a portlet definition process

Before You Begin

Note

Mercury IT Governance Center provides support for JSR 168 and WSRP standards-compliant portlets. This support is based on the Apache Reference implementations of two specifications: Pluto and WSRP4J. However, the specifications may not be complete in all areas or may be open to interpretation. Mercury has made design decisions to cover these areas.

Mercury is committed to provide support for customers implementing these types of portlets, including debugging and diagnosing problems related to the Mercury IT Governance Dashboard. Mercury will not extend that support to cover the debugging of custom portlet code or configuration files.

To facilitate diagnosis, customers reporting problems to Mercury Support are required to provide a simple, reproducible case that demonstrates the error in the Mercury IT Governance Dashboard.

The Import a Portlet Definition wizard is used to import Java portlets and WSRP portlets, making those imported portlets available so that Dashboard users can add them to their Dashboards. Before importing a portlet, make sure of the following:

- For Java portlets, make sure the WAR files exist on the server file system.
- For WSRP portlets, make sure the producer Web URL is available.

Configuring Imported Portlet Definitions

Imported portlet definitions can be minimally configured. For information concerning configuring imported portlet definitions, see *Configuring Portlet Definitions: Special Cases* on page 137.

Importing Java Portlet Definitions

This section details the steps required to import a Java portlet definition.

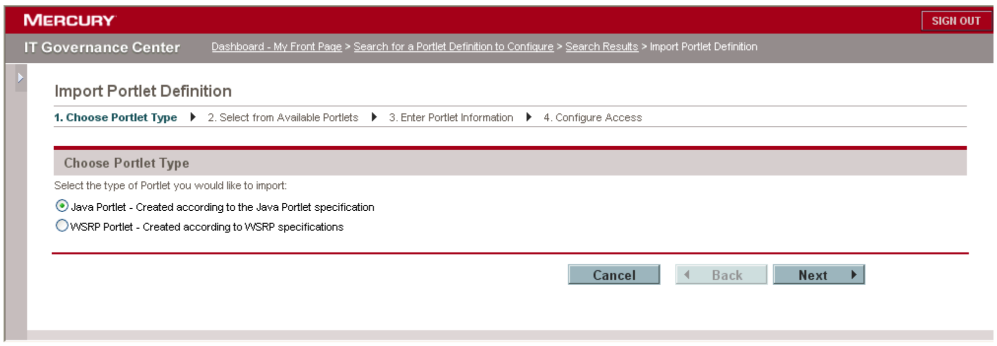
Opening the Import a Portlet Definition Wizard

This section details the steps required to open the Import a Portlet Definition wizard.

To open the Import a Portlet Definition wizard:

1. Log on to the standard interface.
2. On the menu bar, click **Administration > Portlet Definitions > Import a Portlet Definition.**

   The Import a Portlet Definition wizard appears and opens to the Choose Portlet Type page. For more information concerning the Choose Portlet Type page, see the next section (*Step One: Choose the Portlet Type*).



Step One: Choose the Portlet Type

Complete the Choose Portlet Type page. The Chose Portlet Type page lists the available import portlet types. The following is a list of the portlet types which can be imported:

- Java portlet
- WRSP portlet

Figure 9-2 shows the Choose Portlet Type page.

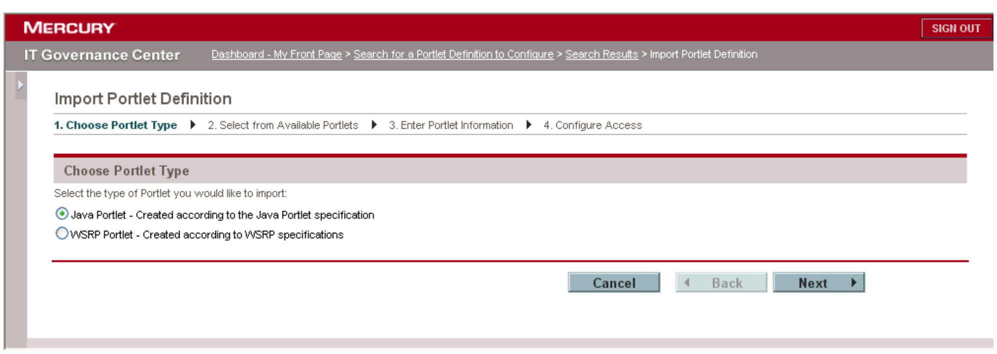


Figure 9-2. Choose Portlet Type page

Choose a portlet type:

1. On the Choose Portlet Type page, in the Select Portlet Type section, select the type of portlet to import.

   Choose Java Portlet -- Created according to the Java Portlet specification

2. At the bottom of the Choose Portlet Type page, click **Next.**

   The Select from Available Portlets page appears. For more information concerning the Select from Available Portlets page, see the next section (*Step Two: Select from Available Portlets*).

Step Two: Select from Available Portlets

Complete the Select from Available Portlets page. The Select from Available Portlets page is used to select a portlet definition from the available list. For Java portlets, the list is extracted from the Java portlet WAR files. *Figure 9-3* shows the Select from Available Portlets page.

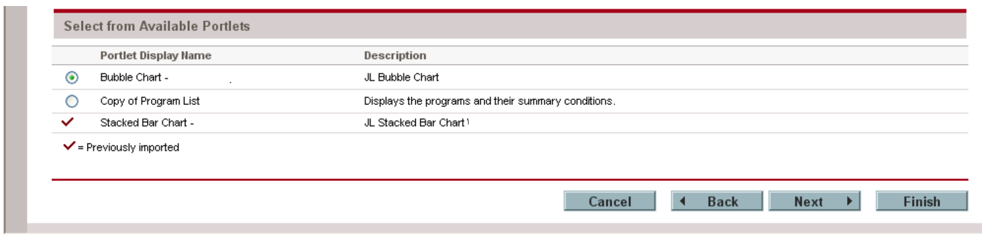


Figure 9-3. Select from Available Portlets page

To select a portlet:

1. On the Select from Available Portlets page, select a portlet.

   Only one portlet can be selected at a time.

2. At the bottom of the Select from Available Portlets page, click **Next.**

   The Enter Portlet Information page appears.

Step Three: Enter Portlet Information

Configure some of the general information of the portlet definition, such as the name of the imported portlet and the portlet category. *Figure 9-4* shows the Portlet Information page.

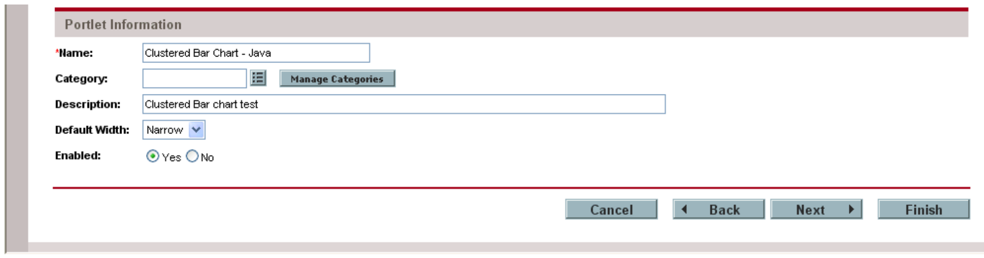


Figure 9-4. Enter Portlet Information page

To enter information on the Enter Portlet Information page:

1. On the Enter Portlet Information page, in the Portlet Information section, enter information concerning the portlet.

2. The following table provides information regarding the fields of the Enter Portlet Information page.

Field	Description
Name	The name of the portlet. This is a required text field. The name of the portlet must be unique. The maximum length of the name is 80 characters. The default is the name displayed in the Portlet Display Name column on the Select from Available Portlets page.
Category	The functional categories of the portlet. By grouping portlets into portlet categories, finding a specific portlet to add to a Dashboard page is made easier. Typically, portlet categories define a entity, such as requests or tasks. Portlet categories can also define functional groups, such as Development or Test. This is an optional multi-select auto-complete field. Select one or more categories

Field	Description
Manage Categories	The **Manage Category** button. Clicking the Manage Category button displays the Manage Categories page. Use the Manage Categories page to add or delete portlet categories. For more information concerning the Manage Categories page, see *Managing Portlet Categories*.
Description	Description of the portlet definition. It'll be helpful to describe the main function of the portlet, such as *Showing Projects for a desired Program*. This is an optional text field. The maximum length of the description is 1800 characters.
Default Width	Sets the default width of the portlet. This is a drop-down list with the values Narrow and Wide. The default is Narrow.
Timeout	Shows the length of time before a portlet should time out. This is an optional numeric text field. The default is 20.
Enabled	Indicates whether the portlet can be added to the Dashboard page. Yes enables the portlet to be added to a Dashboard page. These are Yes/No Radio buttons. Only one value can be selected. The default is Yes.

3. At the bottom of the Enter Portlet Information page, click **Next.**

   The Configure Access page displays.

Managing Portlet Categories

An optional part of completing the Enter Portlet Information page is to manage portlet categories. Portlet categories define a entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet makes a portlet easier to find. Use the Manage Categories page to add or delete portlet categories.

Adding a portlet category requires the Manage Categories page (see *Figure 9-5*). See *Managing Portlet Categories* on page 86 for instructions on how to manage portlet categories.

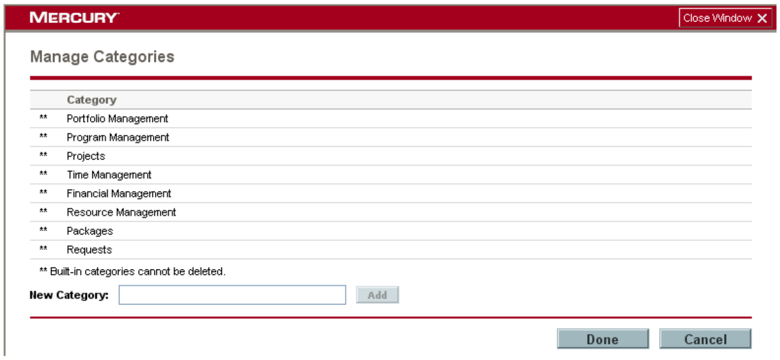


Figure 9-5. Manage Categories page

Step Four: Configure Access

Complete the Configure Access page. The Configure Access page allows administrators to set up the user and group access to the portlet. The sections of the Configure Access page include:

- **User Access.** This section controls which users or group of users can add this portlet to their Dashboards.
- **Administrator Access.** This section controls what users or group of users can configure this portlet definition after the definition has been created. Note that the specified users still need the privilege Configure Portlet Definitions in order to configure a portlet definition.
- **WSRP Access.** This section makes the portlet available to WSRP consumers.

Initially, access to a portlet definition is given to all users in User Access or all administrators in Administrator Access. If the application administrator removes all securities from the list, then the portlet definition returns to initial access, which is either to all users in User Access or all administrators in Administrator Access. *Figure 9-6* shows the Configure Access page.

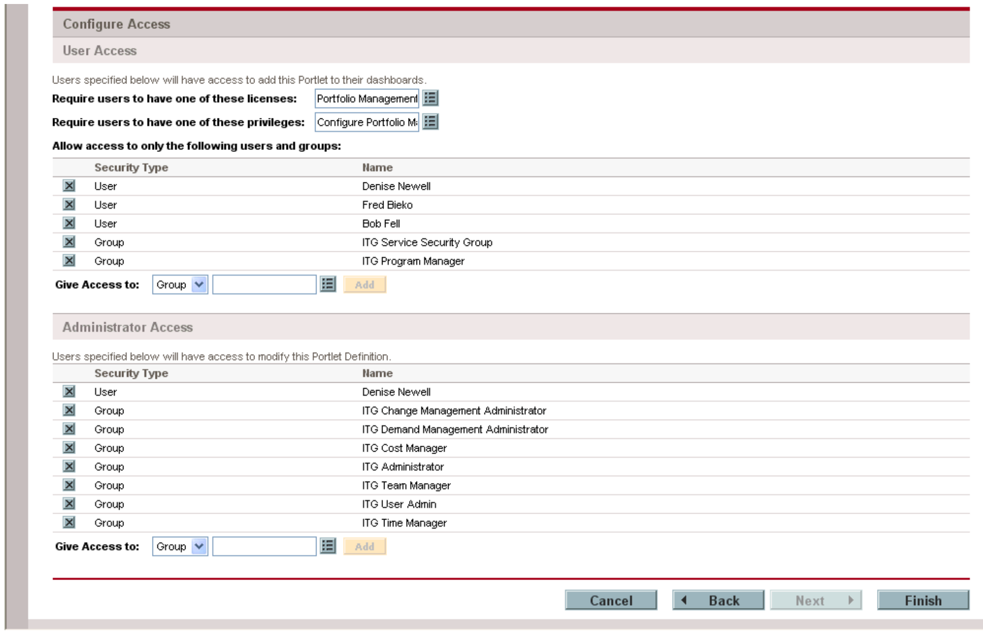


Figure 9-6. Configure Access page

To configure portlet access:

1. Follow instructions for configuring portlet access in *Step Five: Configure Access* on page 102.

2. At the bottom of the Configure Access page, click **Finish.**

   Click **Back** to return to the previous page. Click **Cancel** to stop the importation of Java portlet.

Verifying the Import Portlet Definition

Once a portlet definition is successfully created, a portlet definition confirmation page is opened. The portlet definition confirmation page confirms that the portlet definition has been successfully created, and offers some links on what to do next.

Importing WRSP Portlet Definitions

This section details the steps required to import a WRSP portlet definition.

Opening the Import a Portlet Definition Wizard

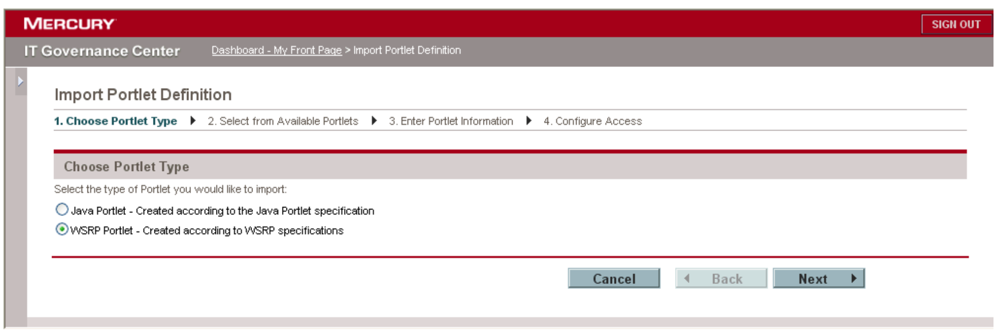
This section details the steps required to open the Import a Portlet Definition wizard.

To open the Import a Portlet Definition wizard:

1. Log on to the standard interface.

2. On the menu bar, click **Administration > Portlet Definitions > Import a Portlet Definition.**

   The Import a Portlet Definition wizard displays the Choose Portlet Type page.



Step One: Choose the Portlet Type

Complete the Chose Portlet Type page. The Chose Portlet Type page lists the available import portlet types. The following is a list of the portlet types which can be imported:

- Java portlet
- WRSP portlet

Figure 9-7 shows the Choose Portlet Type page.

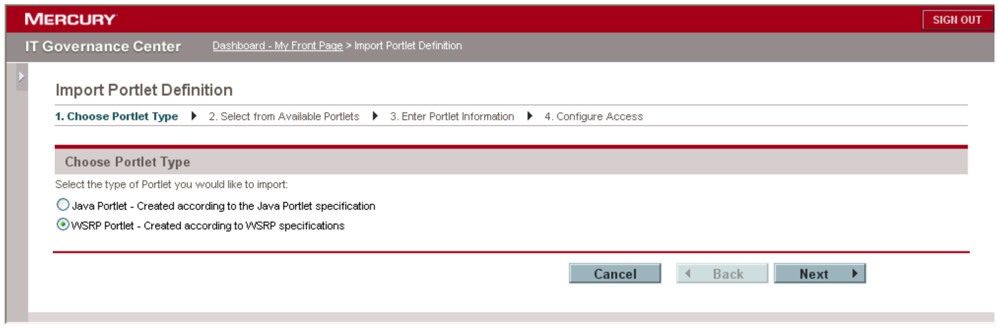


Figure 9-7. Choose Portlet Type page

Choose a portlet type:

1. On the Choose Portlet Type page, in the Select Portlet Type section, select the type of portlet to import.

   Choose WSRP Portlet -- Created according to WSRP specification

2. At the bottom of the Choose Portlet Type page, click **Next.**

   The Select from Available Portlets page appears.

Step Two: Contact Producer Web Site

The Define Producer Web Service page is used to enter the URL for the Web service providing portlets using WSRP. *Figure 9-8* shows the Define Producer Web Service page.

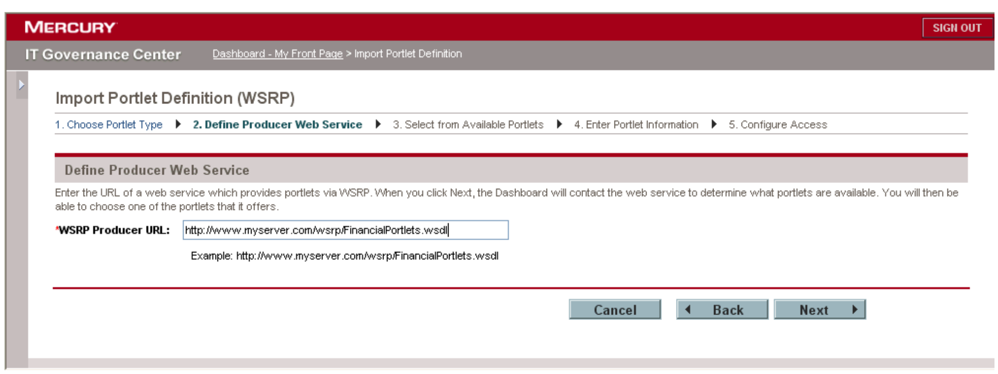


Figure 9-8. Define Producer Web Service page

To contact the WSRP producer Web site:

1. On the Define Producer Web Service page, in the WSRP Producer URL field, enter the URL for the Web service providing portlets using WSRP.

2. At the bottom of the Define Producer Web Service page, click **Next.**

   The Web service is contacted to determine what portlets are available. The Select from Available Portlets page appears. Click **Back** to return to the previous page. Click **Cancel** to stop the importation of WSRP portlet.

Step Three: Select from Available Portlets

Complete the Select from Available Portlets page. The Select from Available Portlets page is used to select a portlet definition from the available list. For WSRP portlets, the list is pulled from the Producer's URL. *Figure 9-9* shows the Select from Available Portlets page.

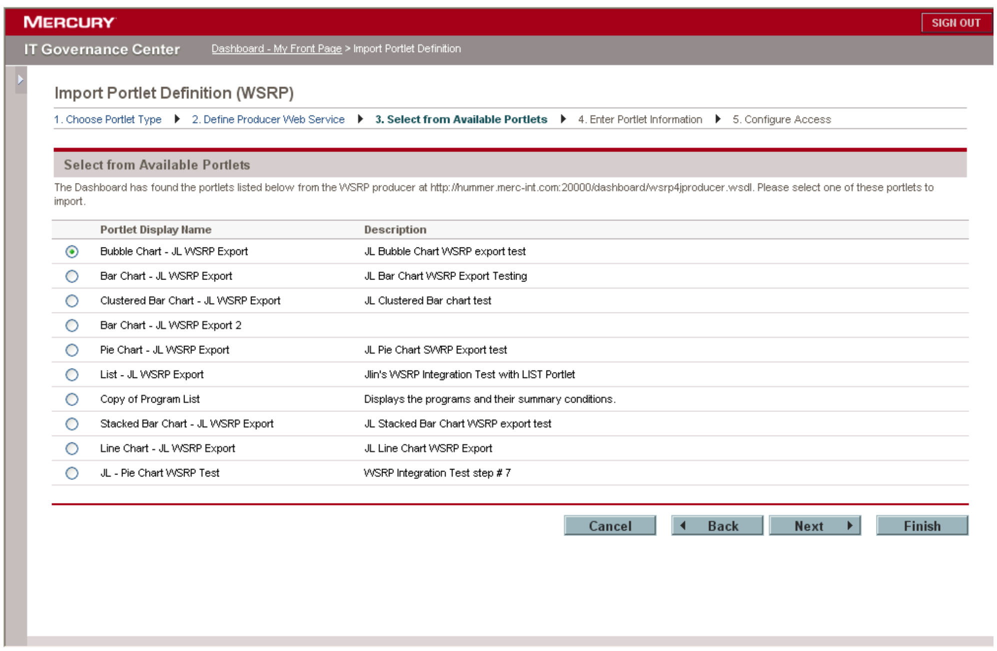


Figure 9-9. Select from Available Portlets page

To select from available portlets:

1. On the Select from Available Portlets page, select a portlet.

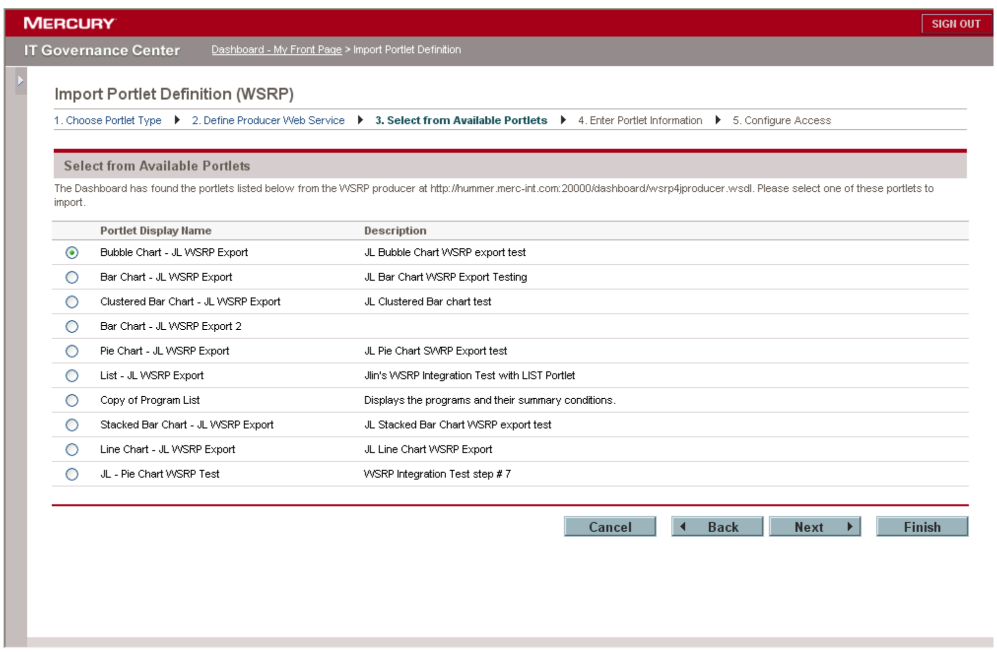
   Only one portlet can be selected at a time.

2. At the bottom of the Select from Available Portlets page, click **Next.**

   The Enter Portlet Information page appears. For more information concerning the Enter Portlet Information page, see the next section (*Step Four: Enter Portlet Information*). Click **Back** to return to the previous page. Click **Cancel** to stop the importation of WSRP portlet.

   When no portlets are available, all of the portlets will be selected. The **Next** and **Finish** buttons will also be disabled. When this happens:

   - Click **Back** to return to the previous page.
   - Click **Cancel** to stop the importation of WSRP portlet.



Step Four: Enter Portlet Information

Complete the Enter Portlet Information page. The Enter Portlet Information page is used to configure some of the general information of the portlet definition, such as the name of the imported portlet and the portlet category. *Figure 9-10* shows the Enter Portlet Information page.

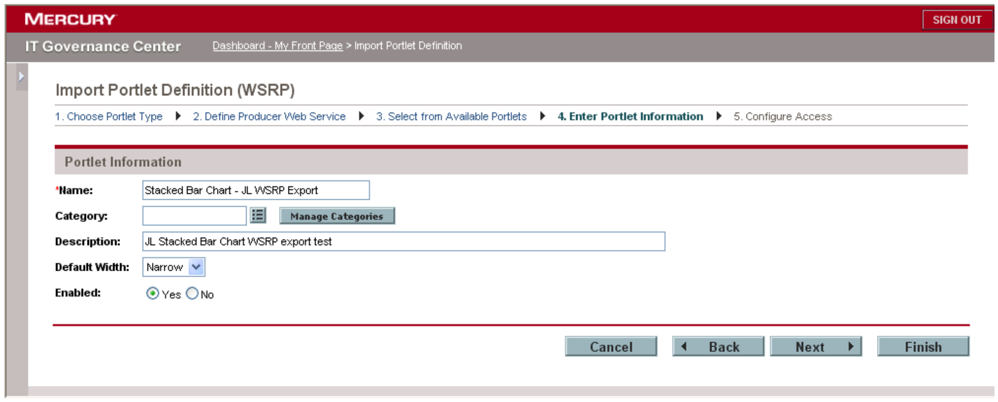


Figure 9-10. Enter Portlet Information page

To enter information on the Enter Portlet Information page:

1. On the Enter Portlet Information page, in the Portlet Information section, enter information concerning the portlet.

2. The following table details information regarding the fields of the Enter Portlet Information page.

Field	Description
Name	The name of the portlet. This is a required text field. The name of the portlet must be unique. The maximum length of the name is 80 characters. The default is the name displayed in the Portlet Display Name column on the Select from Available Portlets page.
Category	The functional categories of the portlet. By grouping portlets into portlet categories, finding a specific portlet to add to a Dashboard page is made easier. Typically, portlet categories define a entity, such as requests or tasks. Portlet categories can also define functional groups, such as Development or Test. This is an optional multi-select auto-complete field. Select one or more categories

Field	Description
Manage Categories	The **Manage Category** button. Clicking **Manage Category** displays the Manage Categories page. Use the Manage Categories page to add or delete portlet categories. For more information concerning the Manage Categories page, see *Managing Portlet Categories*.
Description	Description of the portlet definition. It can be helpful to describe the main function of the portlet, such as *Showing Projects for a desired Program*. This is an optional text field. The maximum length of the description is 1800 characters.
Default Width	Sets the default width of the portlet. This is a drop-down list with the values Narrow and Wide. The default is Narrow.
Timeout	Shows the length of time before a portlet should time out. This is an optional numeric text field. The default is 20.
Enabled	Indicates whether the portlet can be added to the Dashboard page. Yes enables the portlet to be added to a Dashboard page. These are Yes/No Radio buttons. Only one value can be selected. The default is Yes.

3. At the bottom of the Enter Portlet Information page, click **Next.**

   The Configure Access page appears. For more information concerning the Configure Access page, see *Step Five: Configure Access*. Click **Back** to return to the previous page. Click **Cancel** to stop the importation of WSRP portlet.

Managing Portlet Categories

The forth step in importing a WSRP portlet definition is to complete the Enter Portlet Information page. An optional part of the forth step is to manage portlet categories. Portlet categories define a entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet makes a portlet easier to find. Use the Manage Categories page to add or delete portlet categories.

Adding a portlet category requires the Manage Categories page (see *Figure 9-11*). The Manage Categories page is accessed from the Enter Portlet

Information page or the Configure Portlet Definition page. See *Managing Portlet Categories* on page 86 for instructions on how to manage portlet categories.

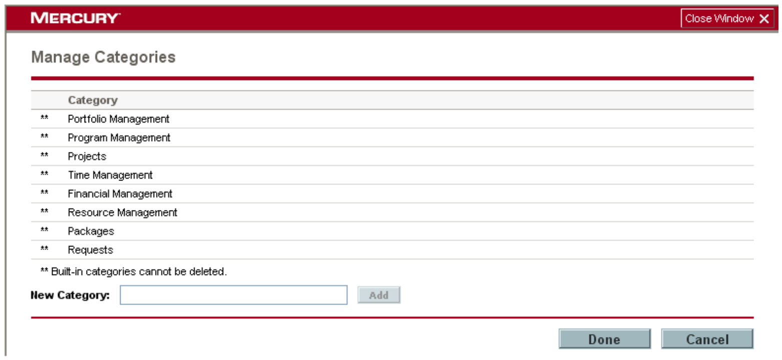


Figure 9-11. Manage Categories page

Step Five: Configure Access

The Configure Access page allows administrators to set up the user and group access to the portlet. The following lists the sections of the Configure Access page:

- **User Access.** This section controls which users or group of users can add this Portlet to their Dashboards.
- **Administrator Access.** This section controls what users or group of users can configure this portlet definition after the definition has been created. Note that the specified users still need the privilege Configure Portlet Definitions in order to configure a portlet definition.

Initially, access to a portlet definition is given to all users in User Access or all administrators in Administrator Access. If the application administrator removes all securities from the list, then the portlet definition returns to initial access, which is either to all users in User Access or all administrators in Administrator Access. *Figure 9-12* shows the Configure Access page.

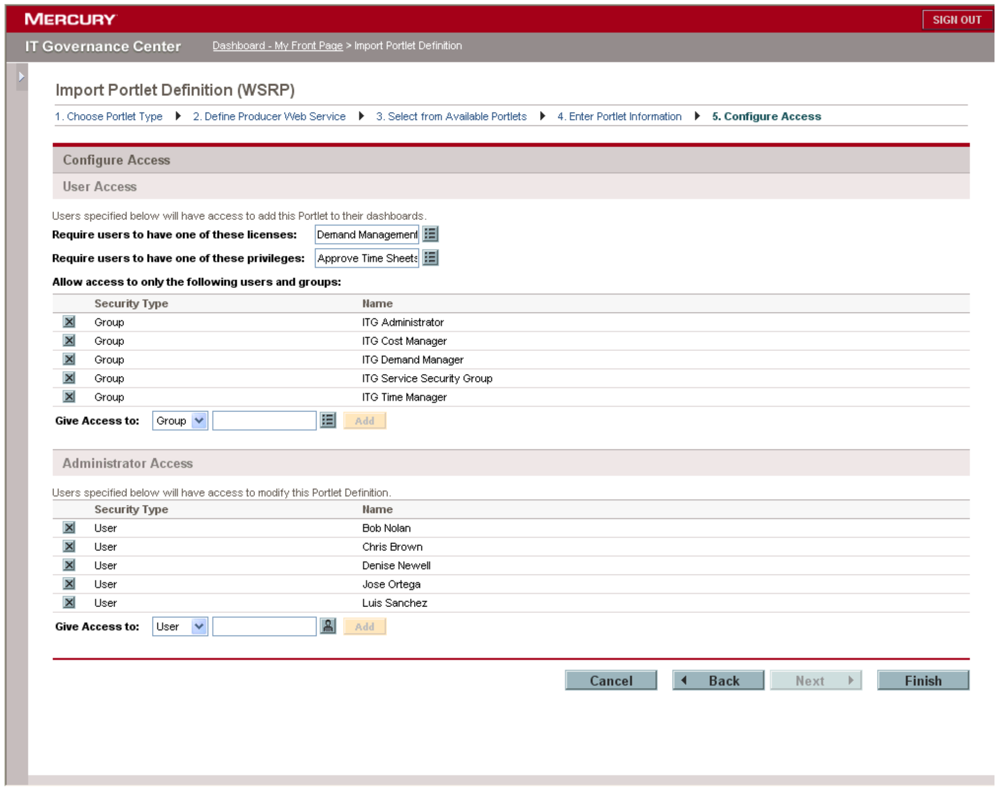


Figure 9-12. Configure Access page

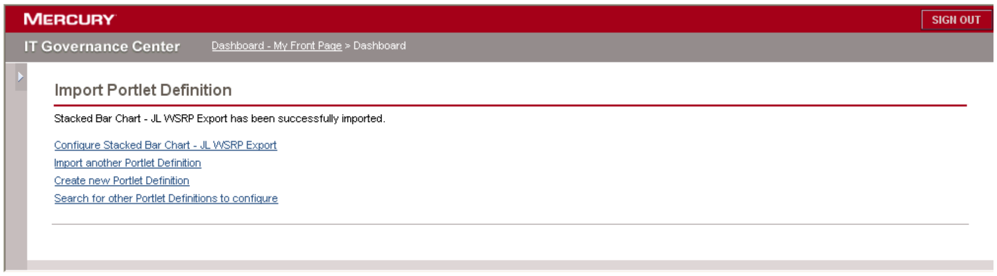
To configure portlet access:

1. Follow instructions for configuring portlet access in *Step Five: Configure Access* on page 102.

2. At the bottom of the Configure Access page, click **Finish.**

   Click **Back** to return to the previous page. Click **Cancel** to stop the importation of WSRP portlet.

   Once a portlet definition is successfully created, a portlet definition confirmation page is opened. The portlet definition confirmation page confirms that the portlet definition has been successfully created, and offers some links on what to do next. The following figure shows a typical confirmation message. The following table lists the links on what to do next.



Link	Definition and Destination
Configure <*Portlet Definition Name*>	Loads the Configure Portlet Definition page for the newly created portlet definition. Select this link to make changes to the newly created portlet definition.
Import another Portlet Definition	Loads the Import a Import a Portlet Definition wizard. Select this to import another portlet definition.
Create another Portlet Definition	Loads the Create a Portlet Definition wizard. Select this link to create a new portlet definition.
Search for other Portlet Definitions to Configure	Loads the Configure Portlet Definitions page. Select this link to search for an existing portlet definition to open in the Configure Portlet Definition page.

Verifying the Import Portlet Definition

Once a portlet definition is successfully created, a portlet definition confirmation page is opened. The portlet definition confirmation page confirms that the portlet definition has been successfully created, and offers some links on what to do next.

Chapter

10

Building Portlet Data Sources

In This Chapter:

Overview of Building Portlet Data Sources

This section provides a brief overview of building a portlet data source. Portlet data sources contain the SQL query used by a portlet definition to retrieve data from the Mercury IT Governance Center database. A portlet data source also contains the filter fields found on a portlet's edit page and sets the edit permissions of the portlet data source.

A portlet data source SQL query consists of the following:

- A **SELECT ... FROM** statement. The SELECT/FROM statement is used to select columns from the designated database table (see *Figure 10-1*). These columns are defined by the portlet definition, such as being a column in a list portlet or the x-axis in a bubble chart portlet.
- A **WHERE** clause. The WHERE clause is used to specify a selection criterion. For example, you can return only those rows where the LOCKED_FLAG is set to yes.
- An **GROUP BY** or **ORDER BY** clause. The GROUP BY or ORDER BY adds a keyword used to sort the result. For example, order the returned rows by the entries in the OBJECT_TYPE column.

```
SELECT OBJECT_TYPE, OBJECT_NAME,
REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

Configured by Select/From tab (SELECT … FROM KACC_PSFT_VC_V)

Configured by Where/Filter tab (WHERE LOCKED_FLAG="Y")

Configured by Group By/Order By tab (ORDER BY OBJECT_TYPE)

Figure 10-1. SQL query example

Each portlet definition must be linked to a single portlet data source for the portlet to operate on a user's Dashboard. A single portlet data source can be linked to multiple portlet definitions. A portlet definition can be linked to only one portlet data source.

Creating a portlet data source requires opening the Portlet Data Source Builder. The Portlet Data Source Builder can be accessed from the Mercury IT Governance Workbench, in the **Dashboard** screen group.

The steps required to create a new portlet data source are illustrated in *Figure 10-2*:

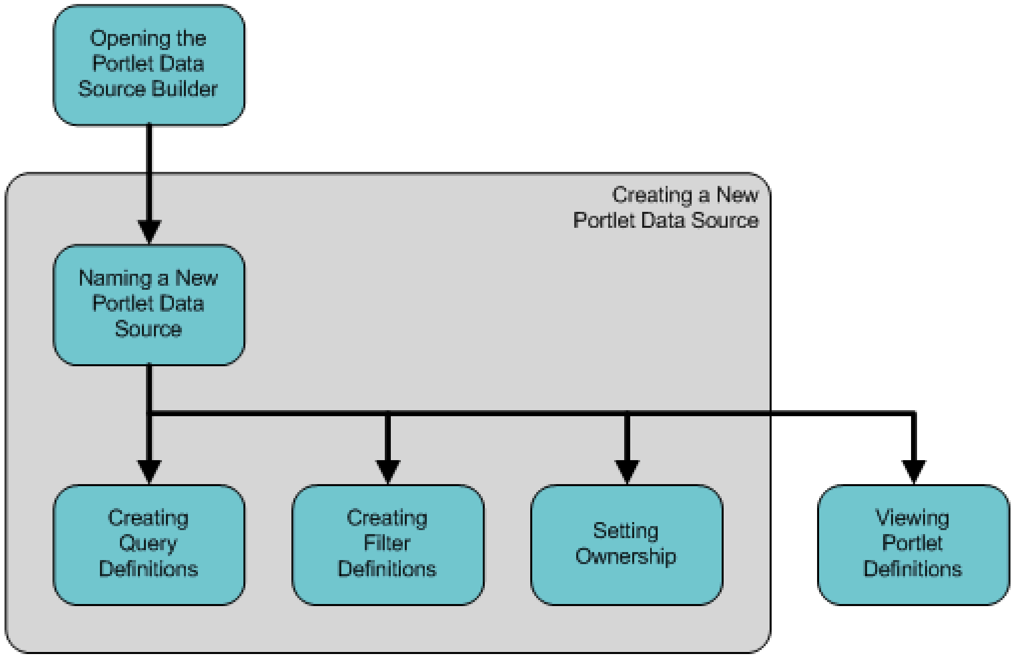


Figure 10-2. Building a data source process

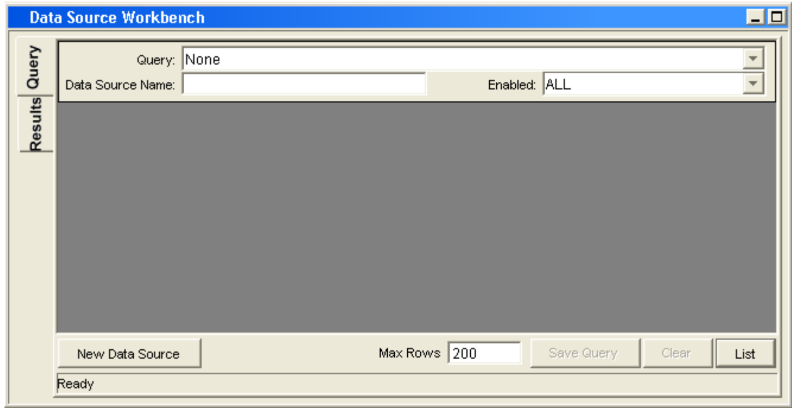
Opening the Data Source Builder

To open the data source builder:

1. Log on to the standard interface.
2. On the menu bar, select **Administration > Open Workbench.**

   The Mercury IT Governance Workbench opens.
3. On the Workbench menu bar, select **Dashboard > Portlet Data Sources.**

   The Portlet Data Sources Workbench opens.



4. To create a new portlet data source, click **New Portlet Data Source.**

   To search for an existing portlet data source, complete the fields on the Portlet Data Source Workbench **Query** tab and click **List.**

For More Information

For more information on how to create a new data source, see *Creating New Portlet Data Sources*. For more information on how to search for an existing portlet data source, see *Searching for Data Sources*.

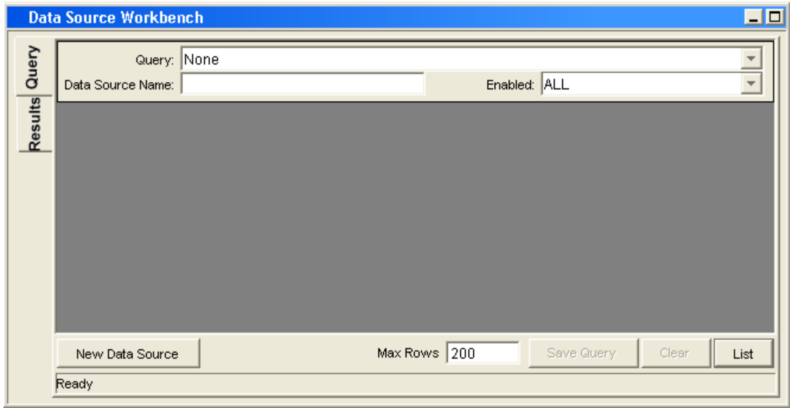
Searching for Data Sources

Use the **Query** tab of the Portlet Data Source Workbench to search for existing portlet data sources.

To search for a data source:

1. From the Workbench, select **Dashboard > Portlet Data Sources.**

   The Portlet Data Source Builder opens.



2. In the **Query** tab, enter the search criteria.

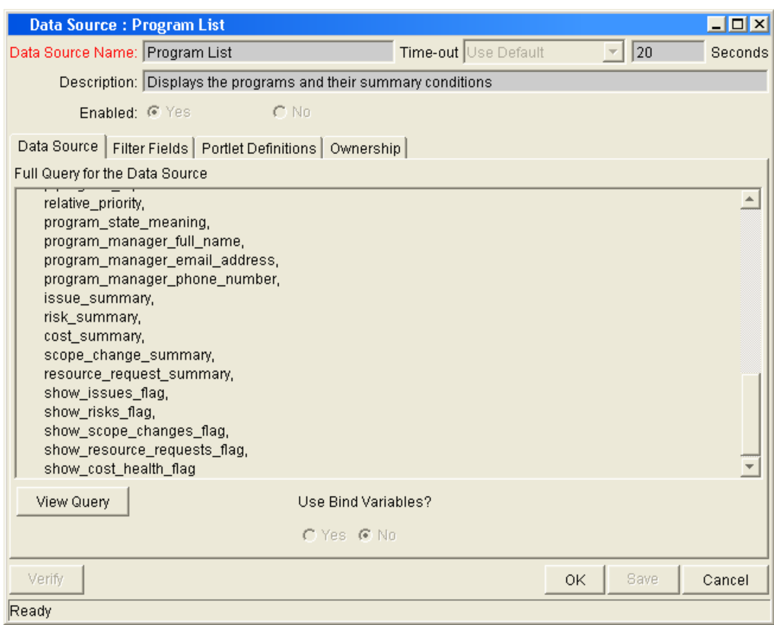
3. Click **List.**

   The **Results** tab opens, displaying the results of the search. To display all portlet data sources, click **List** without entering search criteria.

4. In the **Results** tab, select a portlet data source.

5. In the **Results** tab, click **Open.**

   The Portlet Data Source window opens.



Creating New Portlet Data Sources

Creating a new portlet data source requires the Portlet Data Source window. The fields at the top of the Portlet Data Source window sets general information regarding the portlet data source, such as the name of the portlet data source and its description.

The buttons at the bottom of the Portlet Data Source window allow you to verify the SQL query for the portlet data source, save the latest changes to the portlet data source, save the latest changes and close the Portlet Data Source window, and cancel the creation of the portlet data source.

The tabs in the middle of the Portlet Data Source window open the various tabs and windows required to define the portlet data source. Typically, the general information at the top of the Portlet Data Source window is set before editing the information in the tabs. The following is a list of the tabs and their purpose:

- **Data Source** is used to define the columns of the portlet data source and create the SQL query.
- **Filter Fields** is used to create the filter fields found on a portlet's edit page.
- **Ownership** is used to set who can edit and update the portlet data source.
- **Portlet Definitions** lists the portlet definitions using the portlet data source.

Naming New Portlet Data Sources

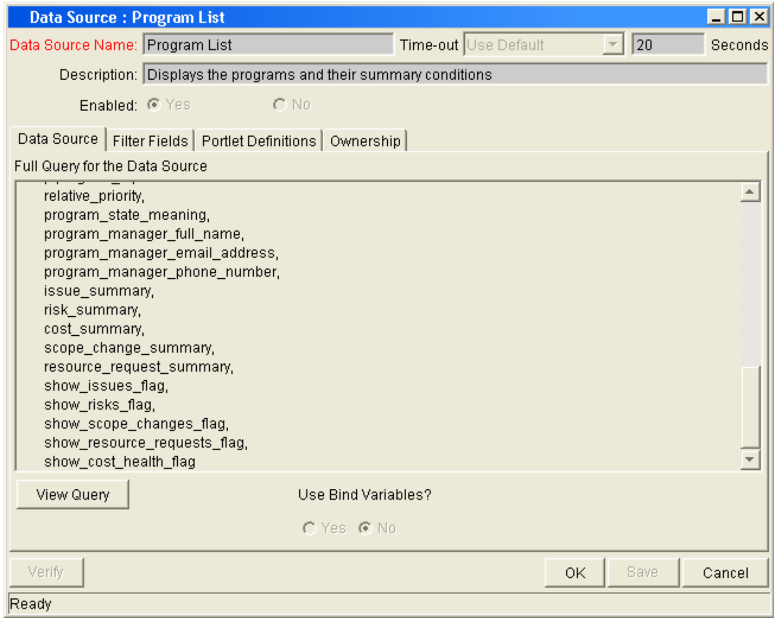
To name a new portlet data source:

1. From the Workbench, select **Dashboard > Portlet Data Sources.**

   The Portlet Data Source Builder opens.

2. Near the bottom of the **Query** tab of the Portlet Data Source Workbench, click **New Portlet Data Source.**

   The Portlet Data Source window opens. By default, the **Data Source** tab is open.



3. In the Portlet Data Source window, complete the fields. The following table lists the field names and a description of each field.

Name	Description
Data Source Name	The name of the data source. Displayed in the search screen and in the data source auto-complete list in the portlet definition editor. A text field.
Time-out	Sets whether to use the system default timeout or specify the number of seconds before the data source times out when executing the query. When set to **Use Default,** the timeout value is disabled. When set to **Portlet Specific,** the timeout value is enabled. A drop-down list.
Time-out value	The number of seconds before the data source's query should time out. This field is disabled unless the Time-out drop-down list is set to **Portlet Specific.** A numeric field.
Description	A description for the data source. A text field.
Enabled	Set whether to allow users to access the portlet data source. Set this field to No when defining the portlet data source. Once the portlet data source is complete, set this field to Yes. A Yes/ No Radio button.

4. At the bottom of the Portlet Data Source window, click **Save.**

   The general information of the portlet data source is saved.

5. Complete each of the tabs on the Portlet Data Source window.

   - Click the **Data Source** tab to create the query definitions.
   - Click the **Filter Fields** tab to create the filter fields.
   - Click the **Ownership** tab to the ownership of the portlet data source.
   - Click the **Portlet Definition** tab to see which portlet definitions are using the portlet data source and to create a portlet definition.

For More Information

- For more information on how to create a query definition, see the next section (*Creating Query Definitions*).
- For more information on how to create filter fields, see *Creating Filter Fields*.
- For more information on how to set ownership of the portlet data source, see *Setting Ownership*.
- For more information on see the portlet definitions accessing the portlet data source, or create a portlet definition, see *Viewing Portlet Definitions*.

Creating Query Definitions

Creating a query definition requires opening the Query Definition window and completing the tabs of the Query Definition window.

The following is a list of the main steps required when creating a query definition:

- Opening the Query Definition window
- Completing the **Select/From** tab
- Completing the **Where/Filter** tab
- Completing the **Group By/Order By** tab

Opening the Query Definition Window

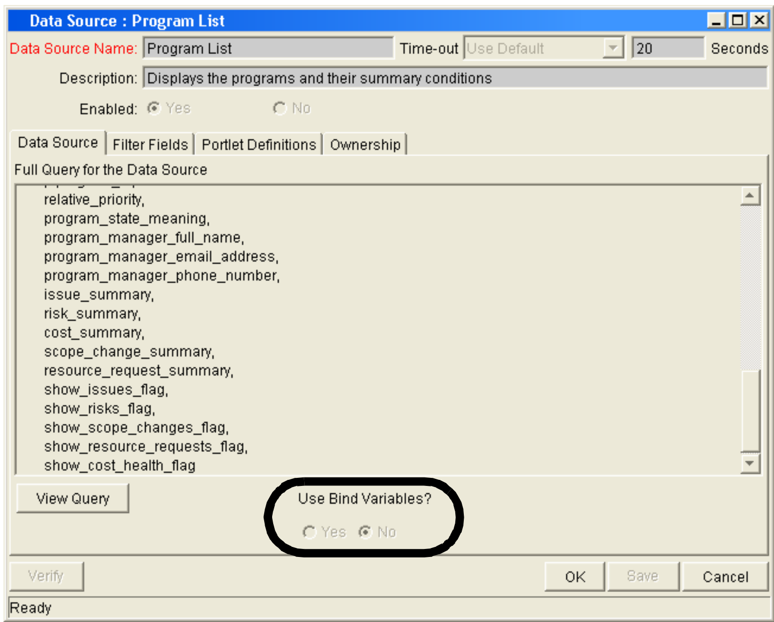
To open the query definition window:

1. From the Workbench, select **Dashboard > Portlet Data Sources.**

   The Portlet Data Source Builder opens.

2. Select a portlet data source.

   The Portlet Data Source window opens. By default, the **Data Source** tab is open.



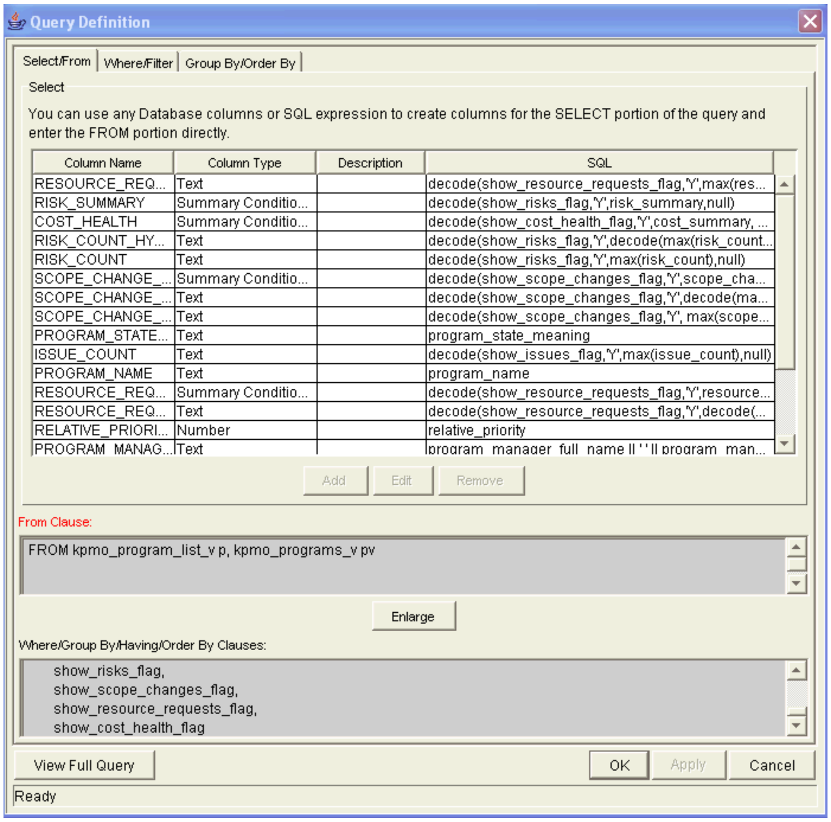
3. Below the text area, set Use Bind Variables.

   The Use Bind Variables radio button should be set to **Yes,** except when:

   - Any of the filter fields are multi-enabled
   - The portlet query statement includes tokens

4. In the **Data Source** tab, click **Edit Query.**

   The Query Definition window opens.



By default, the **Select/From** tab is open.

- Use the **Select/From** tab to create the columns and add the SELECT and FROM clauses for the SQL query.
- Use the **Where/Filter** tab to add WHERE clauses to the SQL query.
- Use the **Group By/Order By** tab to add GROUP BY or ORDER BY clauses.

Completing the Select/From Tab

The **Select/From** tab allows you to construct the SQL query the data source executes. Columns are created in the Edit Column window. Each column includes a COLUMN_ID. These COLUMN_IDs form the first part of the SELECT statement. The FROM Clause selects the table the COLUMN_IDs will be selected from. The FROM clause is manually entered in the FROM Clause text area.

```
SELECT OBJECT_TYPE, OBJECT_NAME,
REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

Column SQL

From Clause

Figure 10-3. SQL query example

To complete the Select/From tab:

1. From the Workbench, select **Dashboard > Portlet Data Sources.**

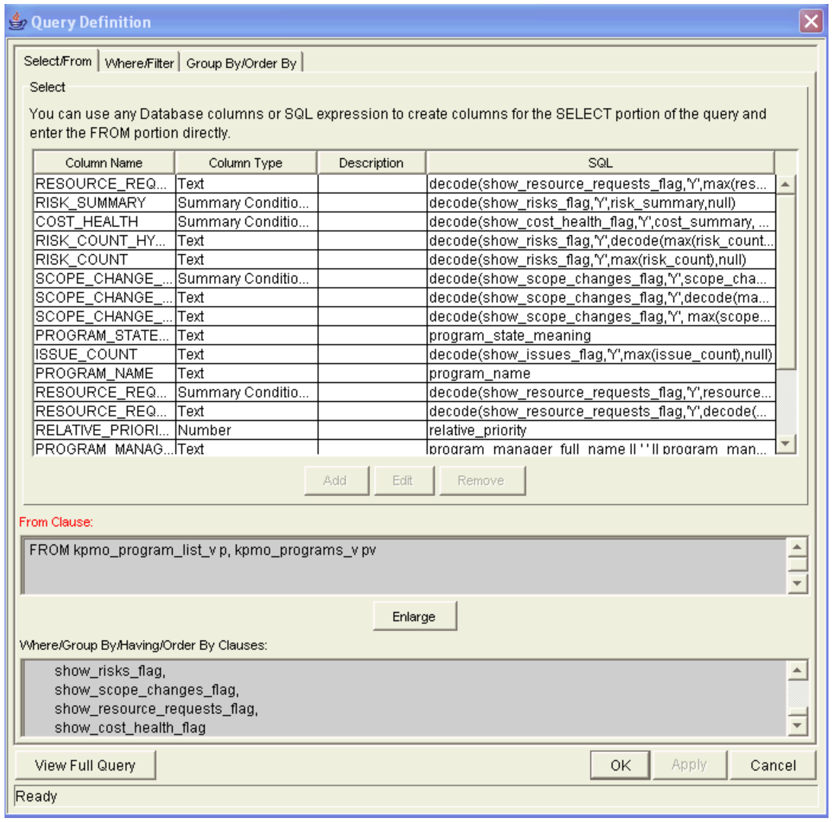
   The Portlet Data Source Builder opens.

2. Select a portlet data source.

   The Portlet Data Source window opens. By default, the **Data Source** tab is open.

3. In the **Data Source** tab, click **Edit Query.**

   The Query Definition window opens. By default, the **Select/From** tab is open.



4. Create a new column.

   a. In the **Select/From** tab, click **New** to create a new column.

      The Edit Column window opens. The default Column Type is text. Selecting another column type can change the fields for the Edit Column window.

   b. In the Edit Column window, complete the fields.

      See the following table for the field names and each field's definition.

Field	Description
Column Name	The name of the column.
Description	A brief description of the column.
Column Type	The type of column: • Text • Number • Date • Condition/Exception • Hyperlink • Currency
Column	The database column name or COLUMN_ID used for the column.

c. At the bottom of the Edit Column window, click **OK.**

The column is added to the Query Definition window. The Edit Column window closes. The Query Definition window opens.

5. In the FROM Clause text area of the Query Definition window, complete the FROM clause.

   Click **Enlarge** to create a larger text entry field.

6. At the bottom of the Query Definition window, click **Apply.**

   The changes to the SQL query are saved. Click **OK** to save the changes to the SQL query and close the Query Definition window. The Portlet Data Source window opens.

Completing the Where/Filter Tab

The **Where/Filter** tab allows you to construct the SQL query the data source executes. The WHERE clause is used to specify a selection criterion.

```
SELECT OBJECT_TYPE, OBJECT_NAME
OBJECT_NAME REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y" ———————— Configured by
ORDER BY OBJECT_TYPE            Where/Filter tab
```

Figure 10-4. SQL query example

To complete the Where/Filter tab:

1. From the Workbench, select **Dashboard > Portlet Data Sources.**

   The Portlet Data Source Builder opens.

2. Select a portlet data source.

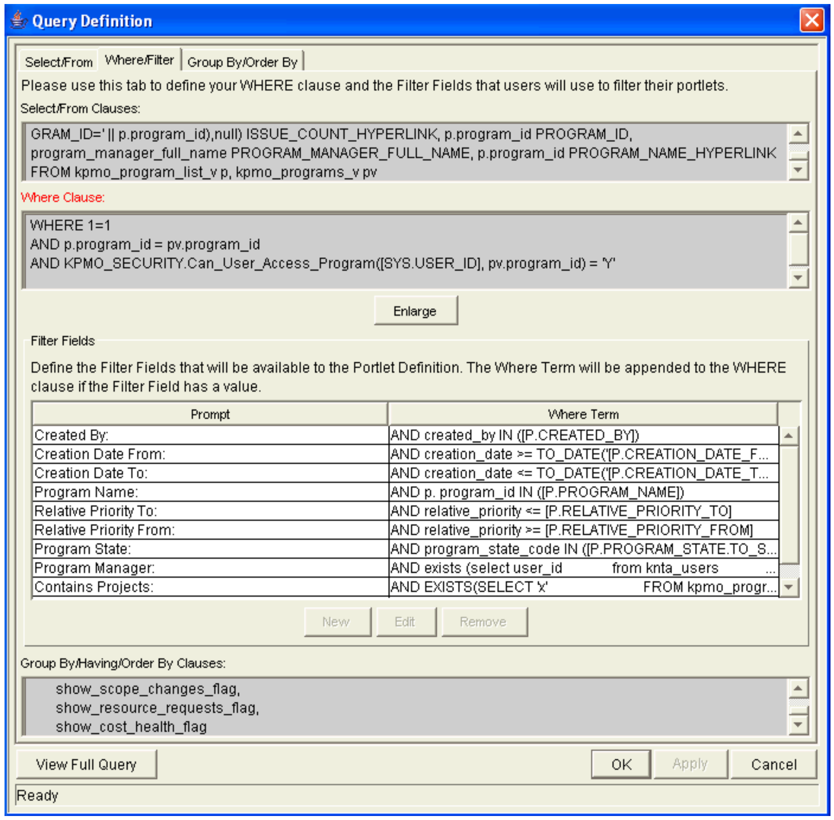
   The Portlet Data Source window opens. By default, the **Data Source** tab is open.

3. In the **Data Source** tab, click **Edit Query.**

   The Query Definition window opens.

4. In the Query Definition window, select the **Where/Filter** tab.

   The **Where/Filter** tab opens.



5. In the Where Clause field, enter the SQL/WHERE clause.

   The Where Clause field defines the WHERE clause of the portlet query. The Where Clause field is a free-form SQL entry area. To open a larger Where Clause entry field, click **Enlarge.**

6. In the Filter Fields section, click **New** to define the filter fields.

   The Filter window opens. The filter fields appear on the portlet's edit page. Each filter field appends its WHERE clause to the portlet query, but only when the filter field is being used by a Dashboard user.

7. In the Filter window, enter data into all required fields and any optional fields.

   See *Creating Filter Fields* for instructions on how to complete the Filter window.

8. At the bottom of the Query Definition window, click **Apply.**

   The changes to the SQL query are saved. Click **OK** to save the changes to the SQL query and close the Query Definition window. The Portlet Data Source window opens.

Completing the Group By/Order By Tab

The **Group By/Order By** tab allows you to construct the SQL query the Data Source executes. The GROUP BY or ORDER BY adds a keyword used to sort the result.

```
SELECT OBJECT_TYPE, OBJECT_NAME,
REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

Configured by Group By/Order By tab

Figure 10-5. SQL query example

To complete the Group By/Order By tab:

1. From the Workbench, select **Dashboard > Portlet Data Sources.**

   The Portlet Data Source Builder opens.

2. Select a portlet data source.

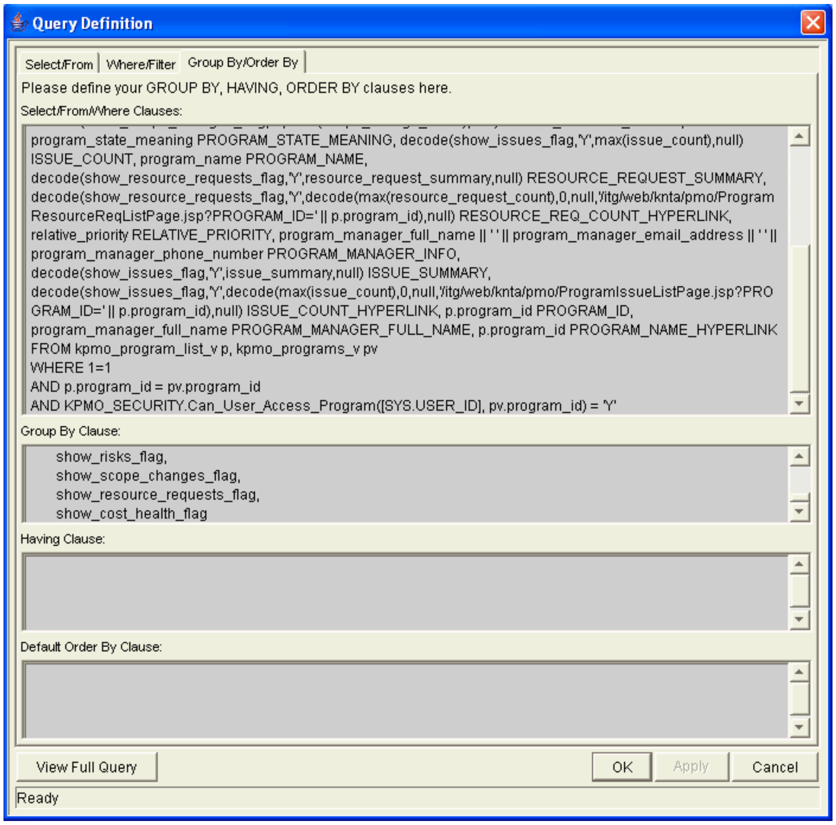
   The Portlet Data Source window opens. By default, the **Data Source** tab is open.

3. In the **Data Source** tab, click **Edit Query.**

   The Query Definition window opens.

4. In the Query Definition window, select the **Group By/Order By** tab.

   The **Group By/Order By** tab opens.



5. In the **Group By/Order By** tab, enter data into all required fields and any optional fields as specified in the following table.

Field	Description
Group By Clause	Enter the Group By terms. The Group By Clause field is a free-form SQL entry area.
Having Clause	Enter the Having terms. The Having Clause field is a free-form SQL entry area.
Default Order By Clause	Enter the Default Order By terms. The Default Order By Clause field is a free-form SQL entry area.

6. At the bottom of the Query Definition window, click **Apply.**

   The changes to the SQL query are saved. Click **OK** to save the changes to the SQL query and close the Query Definition window. The Portlet Data Source window opens.

Creating Filter Fields

To define a filter field:

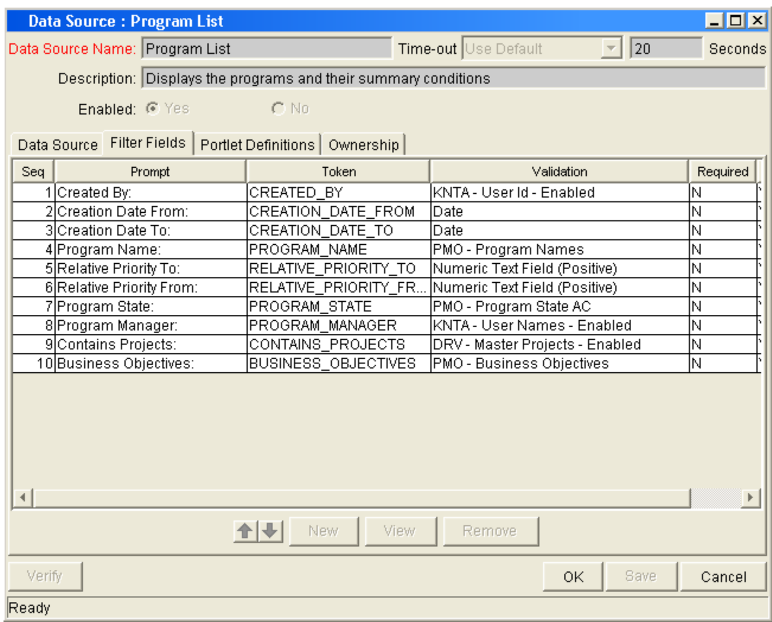
1. From the Workbench, select **Dashboard > Portlet Data Sources.**

   The Portlet Data Source Builder opens.

2. Select a portlet data source.

   The Portlet Data Source window opens.

3. In the Portlet Data Source window, click the **Filter Field** tab.



4. Near the bottom of the **Filter Field** tab, click **New.**

   The Filter window opens.

5. In the Filter window, fill in the fields as specified in the following table.

   The When the Portlet user chooses a value for this field, append to Where Clause field is a free-form SQL entry area. Each filter field will append its term to the portlet query, but only when the filter field is being used by a Dashboard user. Filter field values can be used in the SQL by using the token name [P.TOKEN_NAME] or [VP.TOKEN_NAME].

Field	Description
Field Prompt	The prompt for the filter field that is shown in the portlet's edit page.
Token	The Token for the filter field.
Product	The product the filter field belongs to. This should always be **All Products.**
Description	The description of the filter field.
Validation	The Validation for the filter field.
Component Type	The component type for the filter field, determined by its validation.
Default Value	The default value for the filter field, determined by its validation.
Multi-Select Enabled	Indicates whether the filter field, if an auto-complete list, is enabled for multi-select.
Required	Indicates whether the filter field is required on the portlet's edit page.
Display Only	Indicates whether the filter field can be updated.
Enabled	Indicates whether the filter field is enabled.
When the Portlet user chooses a value for this field, append to Where clause	The AND clause that is appended to the portlet's WHERE clause if the user enters a value in this filter field.

6. At the bottom of the Filter window, click **OK** to save the filter field and close the Filter window.

Setting Ownership

Different groups of users have ownership and control over entities. These groups are referred to as ownership groups. Members of an ownership group are the only users who have the right to edit, delete, or copy that entity. An ownership group consists of one or more security groups.

To configure the ownership of a portlet data source:

1. From the Workbench, select **Dashboard > Portlet Data Sources.**

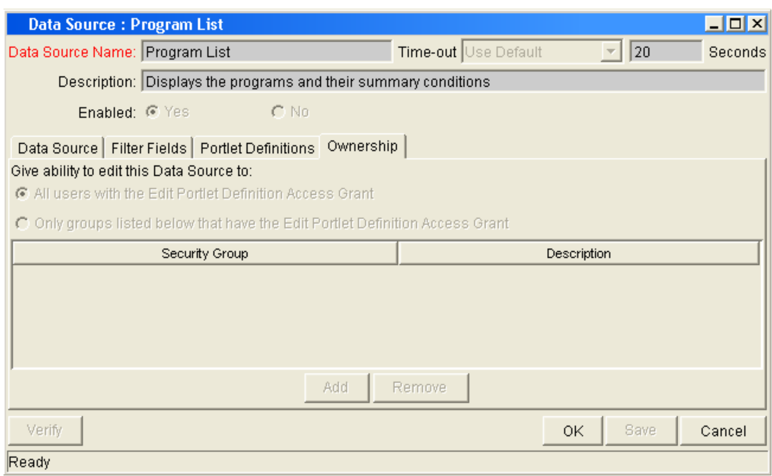
   The Portlet Data Source Builder opens.

2. Select a portlet data source.

   The Portlet Data Source window opens.

3. In the Portlet Data Source window, select the **Ownership** tab.

   The **Ownership** tab opens.



4. At the top of the **Ownership** tab, click Only groups listed below that have the Edit Portlet Definition Access Grant.

5. Add a security group.

   a. Near the bottom of the **Ownership** tab, click **Add.**

      The Add Security Group window opens.

b. From the Security Group single-select auto-complete icon, select a security group.

c. From the Add Security Group window, click **OK.**

   The security group is added to the **Ownership** tab.

6. At the bottom of the **Ownership** tab, click **Save** to save the changes or click **OK** to save the changes and close the window.

Only members of the security groups specified in the Ownership window can edit, copy, or disable a specific portlet. If a security group is disabled or loses the Edit Portlet Definition Access Grant, that group will no longer have access to the Portlet.

If no ownership groups are associated with the entity, the entity is considered global and any user with the proper Edit access grant for the entity can edit, copy, or disable it. Users with the Ownership Override access grant and can access configuration entities even if the user is not a member of one of the ownership groups and does not have the specific Edit access grant.

For More Information

For more information concerning access grants, refer to the *Security Model Guide and Reference*.

Viewing Portlet Definitions

Viewing portlet definitions is not a required step when creating a new portlet data source. The **Portlet Definitions** tab provides a place where you can view all of the portlet definitions currently linked to the portlet data source, and provides a link to the Portlet Definition wizard.

From the Portlet Data Source window, on the **Portlet Definitions** tab, you can:

- View all of the portlet definitions linked to the portlet data source. A portlet data source can be linked to many portlet definitions. A portlet definition can be linked to only one portlet data source.
- Open the portlet definition by clicking on the portlet definition name. This opens the Portlet Definition wizard. The Portlet Definition wizard is populated with the named portlet definition.
- Create a new portlet definition by clicking **New Portlet Definition.** This opens the Portlet Definition wizard.

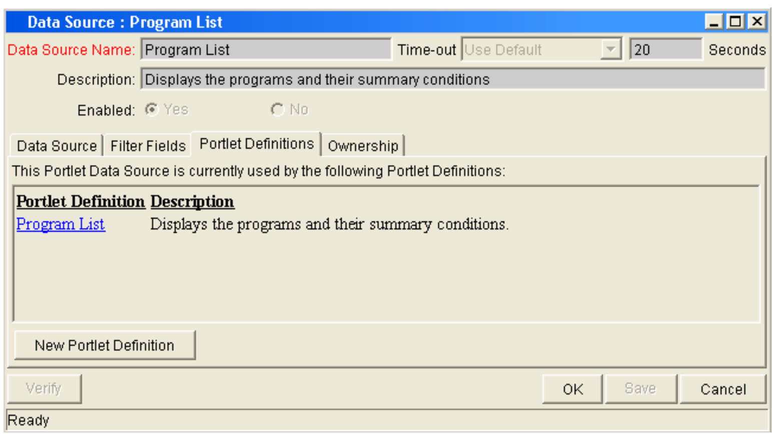


Figure 10-6. Portlet Data Source window, Portlet Definitions tab

Additional Edit Column Pages, Column Types

Adding columns to the Query Definition page requires opening the Edit Column page. The fields of the Edit Column page vary, depending on the column type selected. The following lists the different versions of the Edit Column page:

- Edit Column page, Column Type Text (Number, Date, and Condition/ Exception)
- Edit Column page, Column Type Hyperlink
- Edit Column page, Column Type Currency

Edit Column Page, Column Type Text

The fields of the Edit Column page vary, depending on the column type selected. This section details the fields of the Edit Column page when the column type is:

- Text (default)
- Number
- Date
- Condition/Exception

Figure 10-7 shows the Edit Column page when the Column Type is **Text.**

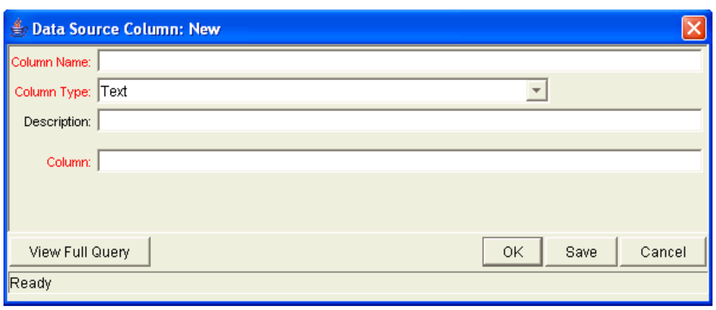


Figure 10-7. Edit Column page, column type text

Table 10-1. Edit Column page, column type text fields and definitions

Name	Description
Column Name	A name for the column. This name is the same as the database alias, and so is constrained to be a valid database identifier, and must be unique amongst other columns (case insensitive). A text field.
Description	A description for the column. A text field.
Column Type	The type of the column. A drop-down menu. The column types are: • Text • Number • Date • Condition/Exception
Column	For single-column types (Text, Number, Date, Condition/Exception), this is a SQL expression which is the name of the column (or a calculation) that should be used as the value of this column. In the case of Condition/Exception, it is expected that the values found in this column expression will be one of **R, Y,** or **G.** A text field.

Edit Column Page, Column Type Hyperlink

The fields of the Edit Column page vary, depending on the column type selected. This section details the fields of the Edit Column page when the Column Type is **Hyperlink.** *Figure 10-7* shows the Edit Column page when the Column Type is **Hyperlink.**

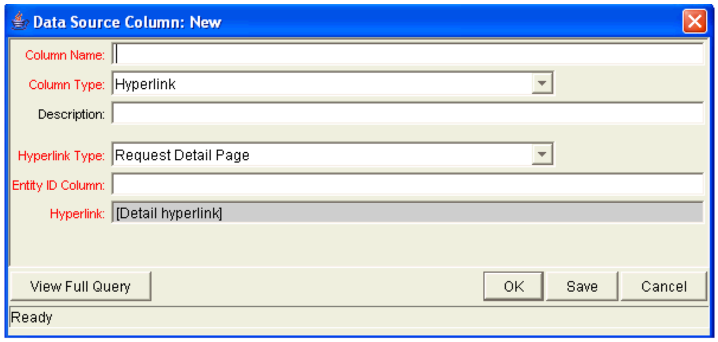


Figure 10-8. Edit Column page, column type hyperlink

Table 10-2. Edit Column page, column type hyperlink fields and definitions

Name	Description
Column Name	A name for the column. This name is the same as the database alias, and so is constrained to be a valid database identifier, and must be unique amongst other columns (case insensitive). A text field.
Description	A description for the column. A text field.
Column Type	The type of the column. The column type is Hyperlink. A pull-down menu.
Hyperlink Type	The type of hyperlink to create from this column. The drop-down menu listing one of the following: • Request Detail Page • Package Detail Page • Task Detail Page • Project Detail Page • Project Overview Page • Custom Hyperlink When any but Custom Hyperlink are selected, the Hyperlink field becomes read-only and displays a preview of the link that will be created (such as “/itg/crt/RequestDetail.jsp?REQUEST_ID=[PRT.ENTITY_ID]”). When Custom Hyperlink is selected, the Hyperlink field becomes editable and required.

Table 10-2. Edit Column page, column type hyperlink fields and definitions

Name	Description
Entity ID Column	A SQL expression used to make a column in the final query. This column should contain values which are (such as, Request Detail Page type Hyperlinks) Request IDs. In the case of the Custom Hyperlink, the values from this column are used to resolve the token PRT.ENTITY_ID, which can be used in the text of the hyperlink.
Hyperlink	In the case of all but the Custom Hyperlink type, this field is read-only and simply displays a preview of the hyperlink to the entity that the user has selected. When the hyperlink is of type Custom Hyperlink, this field contains the actual hyperlink text, which should be of the form: /<*ITG_Home*>/some/page or http://machine.server.com/page.html. The valid tokens are DSH.PRT.ENTITY_ID, DSH.PRT.ENTITY_ID.TO_URL, and SYS.USERNAME.

Edit Column Page, Column Type Currency

The fields of the Edit Column page vary, depending on the column type selected. This section details the fields of the Edit Column page when the Column Type is **Currency.** *Figure 10-7* shows the Edit Column page when the Column Type is **Currency.**

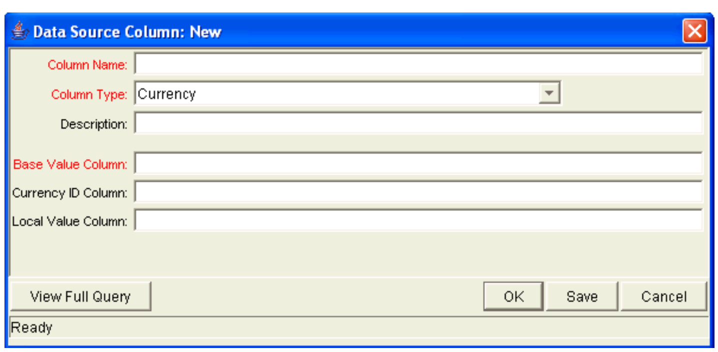


Figure 10-9. Edit Column page, column type currency

Table 10-3. Edit Column page, column type currency fields and definitions

Name	Description
Column Name	A name for the column. This name is the same as the database alias, and so is constrained to be a valid database identifier, and must be unique amongst other columns (case insensitive). A text field.
Description	A description for the column. A text field.
Column Type	The type of the column. The column type is Currency.
Base Value	This field is a SQL column whose values are costs in the base currency that make up the values for this currency column. These values will be displayed if the end-user viewing the portlet has configured their Dashboard to show costs in the system's base currency.
Currency ID Column	This field is a SQL column whose values are the ID of the local currency. This value is never displayed, but will be used to determine how the local currency value (see *Local Value*) is formatted.
Local Value	This field is a SQL column whose values are costs in the local currency that make up the values for the currency column. These values will be displayed (and formatted appropriately for the selected currency) if the end-user viewing the portlet has configured their Dashboard to show costs in the local currency for each entity that the portlet is displaying.

Chapter

11

Customizing the Standard Interface

In This Chapter:

Overview of Customizing the Standard Interface

This section provides a brief overview of how to customize the Mercury IT Governance Center standard interface. *Figure 11-1* shows the standard interface.

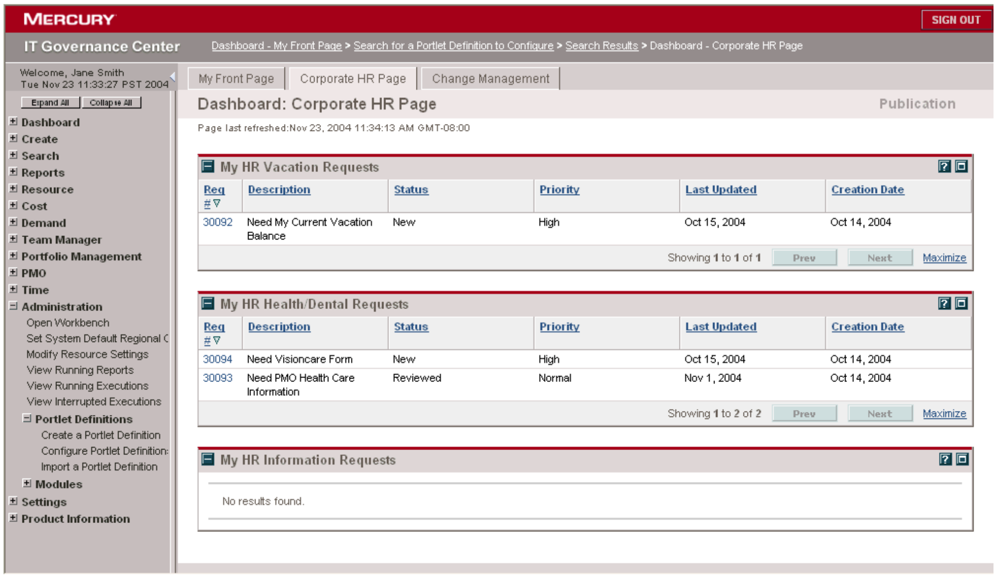


Figure 11-1. Mercury IT Governance Center standard interface

The following lists the ways in which the Mercury IT Governance Center standard interface can be customized:

- **Changing Presentation Layer files.** The presentation layer governs the general look and feel for all Mercury IT Governance Center pages by providing common attributes and a way to include these elements for different layout styles. Included in the presentation layer files are:
  - GIF logo files
  - Cascading style sheets
  - JSP pages
- **Changing XML menu files.** The XML menu files dictate how the menu bar looks and operates in the standard interface. The XML menu files set the order of the menus, submenus, and menu items. The XML menu files also set licensing and access grant restrictions for the menus.

Directory Structure

This section discusses the Mercury IT Governance Center directory structure as it relates to customizing the standard interface.

<ITG_Home> is the top directory of the Mercury IT Governance Server. Located in the *<ITG_Home>* directory tree are various subdirectories containing files related to customizing the standard interface. These subdirectories include:

- `jboss`

  Contains the XSL style sheet filters for the JBOSS applications.

- `menus`

  Contains XML menu files, which are used to change the standard interface menu bar.

- `global`

  Contains files that affect JSP pages system-wide.

  Under the `global` directory are the following subdirectories:

  - `image`, which contains global GIF files
  - `css`, which contains global CSS style sheet files
  - `resource`, which contains global resources—for example, `KEXP_Resources.properties`.

Changing the Presentation Layer

You can change the presentation layer in various ways—for example:

- You can replace logo GIF files.

  In release 6.0 of Mercury IT Governance Center, the `NavLogo.gif` file was replaced by two files, one for the Mercury corporate brand and the other for the IT Governance Center brand:

  - `web/knta/global/images/en/CorporateBrand.gif`
  - `web/knta/global/images/en/CenterBrand.gif`

- You can change fonts and colors by modifying the cascading stylesheets.

  There are two sets of stylesheets: a base set and one for customers using right-to-left languages like Hebrew. (The right-to-left version is generated by a special script.)

  You can change the fonts and colors individually, or change the font family of the standard interface.

- You can modify JSP pages (located in the `global` directory).

  The most common JSP pages are:

  - `Header.jsp`
  - `Footer.jsp`
  - `SimpleHeader.jsp`
  - `SimpleFooter.jsp`

- You can change the look and feel of the Dashboard.

  Dashboard files are in the `deploy` directory in a file named `dashboard.war`.

  To change these files, you need to extract `dashboard.war` to a temporary directory, make the modifications, and then zip up the file again and replace the original copy.

For More Information

Detailed instructions for changing the presentation layer will be available in a document estimated to be available from the Mercury IT Governance Download Center in the first quarter of 2005.

Changing XML Menu Files

The XML menu files dictate how the menu bar looks and operates in the standard interface. The XML menu files set the order of the menus, submenus, and menu items. The XML menu files also sets licensing and access grant restrictions.

Overview of XML Files

The menu bar presents a hierarchical organization of menus, submenus, and menu items (see *Figure 11-2*). Menus and submenus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. The menu structure of the menu bar is defined using a collection of XML files. This collection of files resides in the directory:

`<ITG_Home>/conf/menus/`

The main XML menu file is `core_menu.xml`. The `core_menu.xml` file defines many of the menus, such as Dashboard, Create, Search, Reports, and Administration. Other XML files define specific Mercury IT Governance Center product menus, such as `time_management.xml` for Time Management menu and `oraapps_menu.xml` for the Oracle Applications menu.

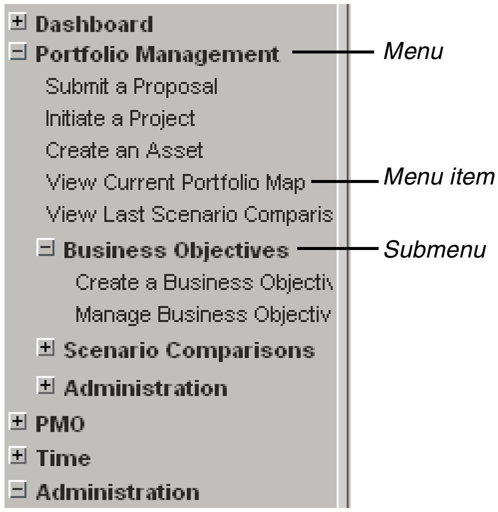


Figure 11-2. Menu bar

The sequence of menus is determined by the **seq** sequence parameter. The sequence parameter sets a specific sequence number for every menu and every menu must have a sequence number. The `core_menu.xml` file leaves sequential room for menu insertions between its menu items. For example, the menu sequence number for the **Dashboard** menu is 1. The next menu sequence in the `core_menu.xml` file is **Create,** which has a sequence number of 10. Menu files outside the `core_menu.xml` file are inserted into the menu bar according to their sequence number. For example, the menu Portfolio Management has a sequence number of 115. The Portfolio Management menu would then be listed after Reports (which has a sequence number of 30). *Figure 11-3* illustrates how the `core_menu.xml` file works with other menu XML files. *Table 11-1* lists all Mercury-supplied IT Governance Center menus, their sequence number, and the file that defines the menu.

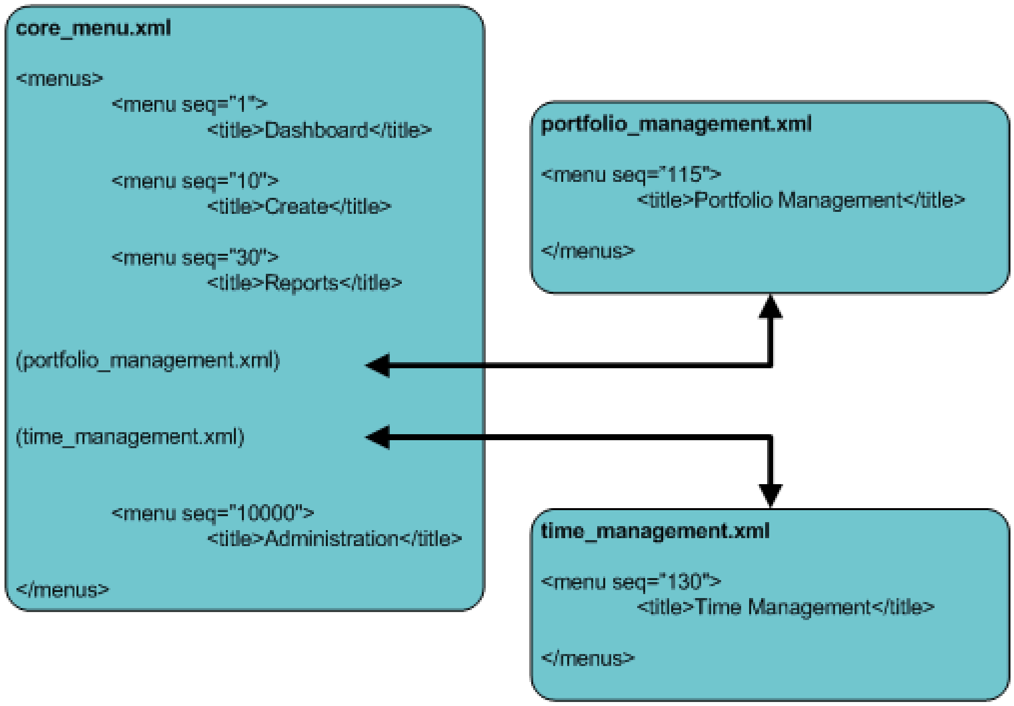


Figure 11-3. Menu sequence

Table 11-1. XML menus and XML menu files

seq #	Menu Title	XML File
1	Dashboard	`core_menu.xml`
10	Create	`core_menu.xml`
20	Search	`core_menu.xml`
30	Reports	`core_menu.xml`
35	Resource	`resource_management.xml`
40	Cost	`cost_management.xml`
100	Demand	`demand manager.xml`
110	Team Manager	`it_manager.xml`
115	Portfolio Management	`portfolio_manager.xml`
120	PMO	`pmo_menu.xml`
130	Time Management	`time_management.xml`
660	Oracle Applications	`oraapps_menu.xml`

Table 11-1. XML menus and XML menu files [continued]

seq #	Menu Title	XML File
670	Oracle Applications Roles	`oraapps_menu_roles.xml`
730	PeopleSoft	`peoplesoft_menu.xml`
10000	Administration	`core_menu.xml`
10010	Settings	`core_menu.xml`
10020	Help	`core_menu.xml`

Inside XML Menu Files

The Mercury IT Governance Center XML menu files are unique XML files containing custom-defined XML elements. *Table 11-2* lists these custom-defined XML menu elements and their definitions. *Figure 11-4* shows a sample XML menu file.

Table 11-2. XML menu elements

Element	Definition
`menus`	The root element for XML menus. All XML menu files must begin and end with the menus element. The parameter `seq="#"` can be added to the menus element. `seq="#"` specifies the order that the menu appears on the menu bar.
`title`	Defines the text for a menu entry.
`access_type`	Opens and closes an `access_type` loop, setting the license and/or access grants required for the menu, submenu, or menu item. The following lists the elements which can be specified in the `access_type` loop: • `license_type` • `access_grant` • `security_group` • `can_create_request_type`
`license_type`	Defines the license for a menu, submenu, or a menu item.
`menu`	Opens and closes a submenu loop. The parameter `seq="#"` can be added to the menu element. `seq="#"` specifies the order that the menu appears on the menu bar.
`menu_title`	Defines the text for a submenu entry.

Table 11-2. XML menu elements [continued]

Element	Definition
`menu_item`	Opens and closes a menu item loop.
`display_text`	Defines the text for a menu item entry.
`url`	Defines a URL for a menu item. URLs can be expressed as an absolute path or a relative path to the `<global>` directory.
`security_group`	Defines the security group for a menu, submenu, or a menu item.
`can_create_request_type`	Defines the request types a user can create.
`access_grant`	Defines the access grant for a menu, submenu, or a menu item.

Table 11-4 shows the code from the `time_management.xml` file.

```
<menus seq="130">  Opens the XML menu file (root element) loop. seq is set at 130.
    <title>Time</title>  Sets the title for the menu
    <access_type>  Opens the access type for the menu
Sets the access_type as a license  <license_type>Time Management</license_type>
    </access_type>  Closes access type loop
    <menu>  Opens a sub-menu loop
        <menu title>Create a Time Sheet</menu title>  Sets the sub-menu title
        <menu_item>  Opens a menu item loop
Sets the menu item text  <display_text>Create a Time Sheet</display_text>
Points to a JSP file  <url>../global/TimeSheetCreate.jsp</url>
            <access_type>  Opens the access type loop for the menu item
Sets the access_type as an access grant  <access_grant>Edit Time Sheet</access_grant>
            </access_type>  Closes access type loop
        </menu_item>  Closes the menu item loop
        <menu_item>  Opens a menu item loop
Sets the menu item text  <display_text>Approve Time Sheets</display_text>
Points to a JSP file  <url>../global/TimeSheetApprovalSearch.jsp</url>
            <access_type>  Opens the access type loop for the menu item
Sets the access_type as an access grant  <access_grant>Approve Time Sheet</access_grant>
            </access_type>  Closes the access type loop
        </menu_item>  Closes a menu item loop
    </menu>  Closes the sub-menu loop
</menus>  Closes the XML menu file (root element) loop
```

Figure 11-4. Sample XML menu file

Customizing Existing Menus

It is possible to customize the default Mercury-supplied IT Governance Center menus, as well as any custom menus developed at your site. This can include such activities as:

- Adding submenus to the menu
- Changing which menu items are included on the menu
- Changing which users can access the menu or menu items

For changes to take effect, flush the menu cache. Ask the application administrator for assistance with this activity. Modifications to an existing (system) menu may be overwritten during an upgrade. Consider copying and renaming the menu's file name before making modifications to an existing template.

> **Note**
> Do not have two different XML menu files defining the same menu residing in the directory:
> `<`*`ITG_Home`*`>/conf/menus/`

Custom menus created at your site will not be deleted during a product upgrade, but Mercury does not guarantee that the custom menus will be compatible with future versions of Mercury IT Governance Center applications.

To customize an existing menu:

1. Log on to the Mercury IT Governance Server.
2. Go to the directory, `<ITG_Home>/conf/menus`.
3. Open an XML menu file.
4. Edit the XML menu file as required.
5. Save and close the XML menu file.
6. Go to the `<ITG_Home>/bin` directory and run the `run_csh_mgr` script to clear the cache.

   Ask the application administrator for assistance with this activity.

> **Note**
> Changes made to an existing XML menu file will not be preserved when the system is upgraded.

Creating New Menus

To create a new menu to appear on the navigation bar, create an XML file that uses the structure outlined in *Inside XML Menu Files*. Consider copying and editing an existing menu to ensure that the correct format is being used.

To create a new menu:

1. Log on to the Mercury IT Governance Server.

2. Go to the directory, `<ITG_Home>/conf/menus`.

3. Create an XML file that adheres to the structure outlined in *Inside XML Menu Files*.

   To avoid a navigational dead end, menu items that link directly to Reports should open the report in another window using the `open Windoid` call. For example, to open the DEM - Demand Creation History Report in a windoid, use the `openWindoid` call as shown:

   ```
   <url>javascript:openWindoid('../global/
   ReportCreateDispatcher.jsp?REPORT_TYPE_
   NAME=DEM+-+Demand+Creation+History+Report')</url>
   ```

   It is also recommended that menu items that link to outside systems be opened in a new window.

4. Go to the `<ITG_Home>/bin` directory and run the `run_csh_mgr` script to clear the cache.

   Ask the application administrator for assistance with this activity.

   Menus located in the `menus` directory will be recognized by Mercury IT Governance Center and inserted into the menu bar according to its sequence. Users with appropriate access (defined in the menu's `<access_type>` tags) will be able to view the menu and menu items.

Note

Custom menus will not be deleted during a product upgrade, but Mercury does not guarantee that the custom menus will be compatible with future versions of Mercury IT Governance Center applications.

Controlling Menu Access

To control which users can view specific menus or menu items, modify the <access_type> element in the XML menu file. For example, select the License and Access Grants required to view a menu by using the <license_type> and <access_grant> tags within the <access_type> loop.

To control which users can view menus, submenus, and menu items, include the <access_type> </access_type> element within the menu or menu item to be restricted.

The location of the <access_type> tag determines which element is controlled (see *Figure 11-5*):

- **Control the menu.** If the <access_type> section is placed anywhere directly within the <menu> </menu> section (such as not in the <menu_item> </menu_item> section), it will restrict access to the entire menu.
- **Control the submenu.** If the <access_type> section is placed within a <menu> </menu> section that defines a submenu, it will restrict access to that submenu.
- **Control the menu item.** If the <access_type> section is placed anywhere within a <menu_item> </menu_item> section, it will restrict access to that menu item.

```
<menus seq="85">
        <title>Resource</title>
                <access_type> This access_type controls a menu
                        <license_type>Project Management Workbench</license_type>
                </access_type>
        <menu>
                <menu_title>Resources</menu_title>
                <access_type> This access_type controls a sub-menu
                        <license_type>Project Management Workbench</license_type>
                        <access_grant>View all resources</access_grant>
                </access_type>
                <menu_item>
                        <display_text>Create a Resource</display_text>
                        <url>../rsc/ResourceCreate.jsp</url>
                        <access_type> This access_type controls a menu item
                                <license_type>Project Management Workbench</license_type>
                                <access_grant>Edit all resources</access_grant>
                        </access_type>
                </menu_item>
        </menu>
</menus>
```

Figure 11-5. Access control

For More Information

For more information concerning licenses and access grants, see *Security Model Guide and Reference*.

Configuring the URLs in the Menus

This section describes the following tools that can be used when configuring the URLs within the <menu_item> tags:

- *Request Create Dispatcher*
- *Report Create Dispatcher*
- *Smart URL Formats*

Spaces cannot be used when configuring the URLs within the <menu_item> tags. Use the plus sign (+) as a substitute for spaces. For example:

```
<url>ReportCreateDispatcher.jsp?REPORT_TYPE_
NAME=DEM+-+Demand+Creation+History+Report</url>
```

Request Create Dispatcher

The Request Create Dispatcher is useful because entity IDs can be different between Mercury IT Governance Center instances. Use the following URL format to access the Request Creation HTML page:

```
<url>../crt/RequestCreateDispatcher.jsp?REQUEST_TYPE_
NAME=DEM+-+Operations+Request</url>
```

This example will open the Request Creation page for the DEM - Operations Request.

Report Create Dispatcher

The Report Create Dispatcher is useful because entity ID’s can be different between Mercury IT Governance Center instances. Use the following URL format to access the Report Submission HTML page:

```
<url>ReportCreateDispatcher.jsp?REPORT_TYPE_
NAME=DEM+-+Demand+Creation+History+Report</url>
```

This example with open the Report Submission page for the DEM - Demand Creation History Report.

Smart URL Formats

Use the following URL format to access a configuration screen:

```
<url>javascript:openWorkbench('&amp;screen=WF&amp;pkname=DEM+-+
Enhancement+Request+Process');</url>
```

This example will open the DEM - Enhancement Request Process Workflow in the Workbench.

Chapter

12

Configuring the Dashboard and Workbench Environments

In This Chapter:

Setting the System Default Regional Calendar

The regional calendar is used for all entities in the system that do not have a region.

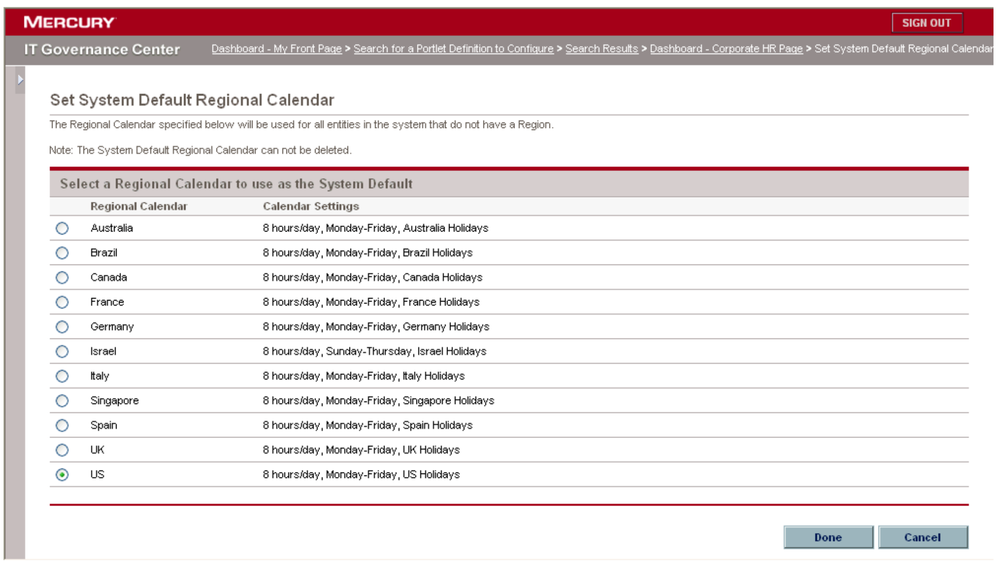
To set the system default regional calendar:

1. Log on to Mercury IT Governance Center.

   To log on to Mercury IT Governance Center, see *Getting Started*. The standard interface appears.

2. From the menu bar, select **Administration > Set System Default Regional Calendar.**

   The **Set System Default Regional Calendar** page appears.



3. On the **Set System Default Regional Calendar** page, select the regional calendar and click **Done.**

   The selected regional calendar becomes the system default regional calendar.

Setting the Default Region for Resources

All resources must have a region to define their regional calendar and local currency. Resources who do not inherit a region from their primary organization unit use the default region.

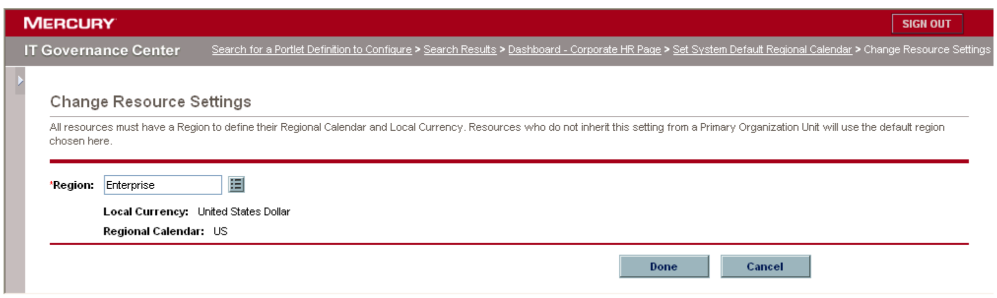
To set the default region for resources:

1. Log on to Mercury IT Governance Center.

   To log on to Mercury IT Governance Center, see *Getting Started*. The standard interface appears.

2. From the menu bar, select **Administration > Modify Resource Settings.**

   The **Change Resource Settings** page appears.



3. In the **Change Resource Settings** page, in Region, select the default region from the single-select auto-complete list and click **Done.**

   The selected region becomes the default region.

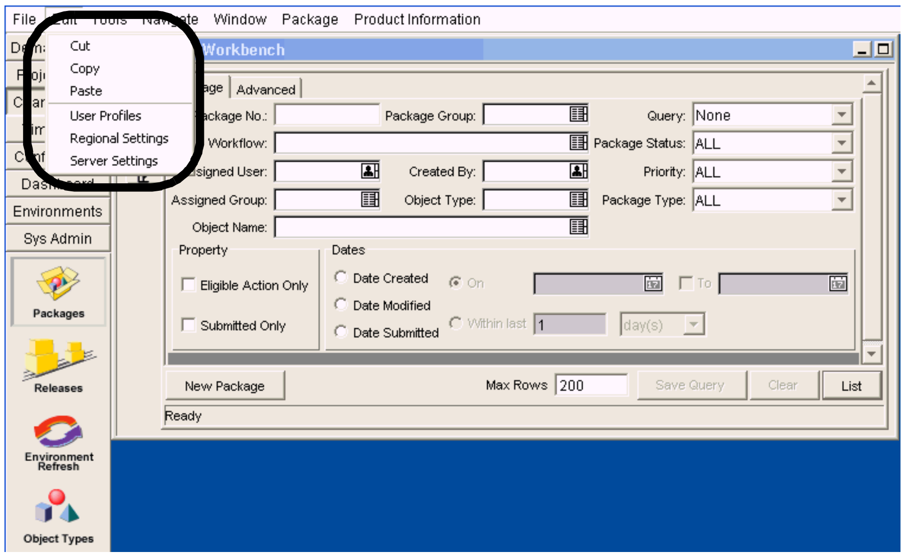
Configuring Workbench General Preferences

To configure a Workbench's general preferences:

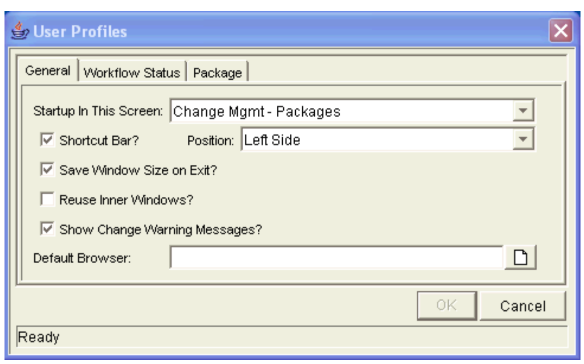
1. Open the Workbench.

   To open the Workbench, see *Getting Started*. The Workbench is displayed.

2. From the Workbench Menu bar, select **Edit > User Profiles > General.**



   The User Profiles window opens.



3. In the User Profiles window, configure your user preferences as specified in the following table and click **OK.**

Fields	Description
Startup in this Screen	Indicates which screen group is first seen when logging into the application.
Shortcut Bar?	Indicates whether or not the shortcut bar is shown. If the shortcut bar is not shown, navigate between windows using the **Navigate** menu.
Position	If the shortcut bar is shown, determines which side of the Workbench it appears on.
Save Window Size on Exit?	Saves the size of the entire Workbench when exiting the application. The window retains its size when logging back into the application.
Reuse Inner Windows?	Indicates whether or not multiple windows can be open at once. If this field is deselected, only one detail window for each entity from its Workbench can be selected.
Show Change Warning Messages?	Indicates whether or not warning messages are sent when attempting to change the entities (such as Project Templates).
Default Browser	Indicates which browser is used to view attachments and URLs.

Your Workbench user preferences are saved.

Setting Workflow Status

The User Profiles window **Workflow Status** tab of sets the display of workflows based on the status of their steps.

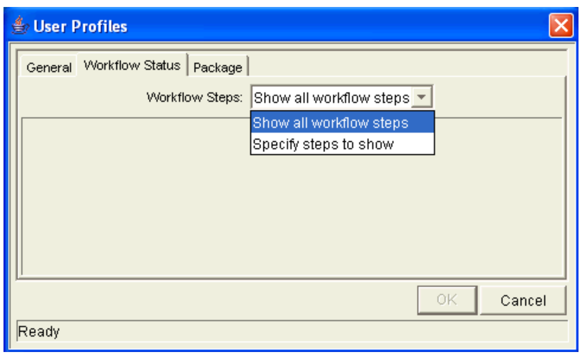
To set a workflow's status:

1. Open the Workbench.

   To open the Workbench, see *Getting Started*. The Workbench is displayed.

2. From the Workbench menu bar, select **Edit > User Profiles > Workflow Status.**

   The **Workflow Status** tab opens.



3. In the **Workflow Status** tab, select the workflow step option and click **OK.**

   The workflow step options are:

   - **Show all Workflow Steps.** Show all the steps in the Workflow. No options are available.
   - **Specify steps to show.** Show specific steps in the workflow. Options include the following:
     - show traversed steps
     - hide immediate and condition steps not in progress

   The workflow step option is saved.

Setting Cancelled Package Lines

The User Profiles window **Package** tab sets the display of cancelled package lines.The User Profiles window **Package** tab has one option field, Hide Cancelled Package Lines.

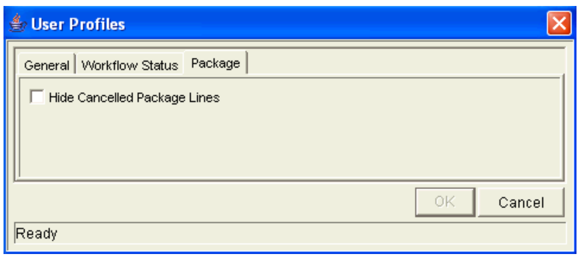
To hide cancelled package lines:

1. Open the Workbench.

   To open the Workbench, see *Getting Started*. The Workbench is displayed.

2. From the Workbench Menu bar, select **Edit** > **User Profiles** > **Package.**

   The **Package** tab opens.



3. In the **Package** tab, select Hide Cancelled Package Lines and click **OK.**

   Cancelled package lines will be hidden from view.

Configuring Regional Settings

Users can modify the display of dates, times, and numbers using the Regional Settings window. Each user's computer operating system has a locale setting specifying the user's language and country. Mercury IT Governance Center reads this setting and displays dates, times, and numbers according to the region's customary format. For example, in Germany dates are displayed in day-month-year format with periods as separators (18.4.2001). In the United States, dates are displayed in month-day-year format with forward slashes as separators (4/18/01).

Note

All dates, times, and numbers are set to display using the default settings for the user's region.

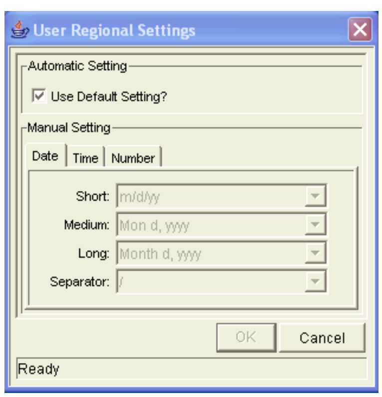
To modify the display of regional settings:

1. Open the Workbench.

   To open the Workbench, see *Getting Started*. The Workbench is displayed.

2. On the Workbench menu, select **Edit > Regional Settings.**

   The User Regional Settings window opens.



3. In the User Regional Settings window, deselect the Use Default Setting checkbox.

   Deselecting the Use Default Setting checkbox enables the fields in the **Date, Time,** and **Number** tabs.

4. In the User Regional Settings window, click the **Date** tab.

   The **Date** tab is used to set the display of dates to short, medium, and long format. The following lists examples of date formats:

   - Short — m/d/yy
   - Medium — dd-Mon-yy
   - Long — Month d, yyyy

   Users can also specify the characters used to separate days, months, and years. Formats and delimiters are updateable through drop-down lists.

5. In the User Regional Settings window, click the **Time** tab.

   The **Time** tab is used to set the display of times in either the 12- or 24-hour format. Users can also specify AM and PM symbols and the character used to separate hours, minutes, and seconds. Format, symbols, and delimiters are updateable through drop-down lists.

6. In the User Regional Settings window, click the **Number** tab.

   The **Number** tab is used to configure which characters are used to denote decimals (either a period or a comma). Users can also define the grouping of digits, the symbol used to group them, and the sign used to mark percentages. Decimal markers, digit groupings and symbols, and percentage signs are updateable through drop-down lists.

7. In the User Regional Settings window, click **OK.**

   The new settings for the date, time, and number are saved. These settings are saved in your personal profile, and are not editable by another user. You must log off of the Workbench and then logon again for the new regional settings to take effect.

Configuring Server Settings

The Server Settings window is used to configure how much information is logged by the server while running the application. This log information is used to analyze performance issues and gather information while the application is in use.

Note

Unless specifically told to do so by the application administrator, do not change the server's settings.

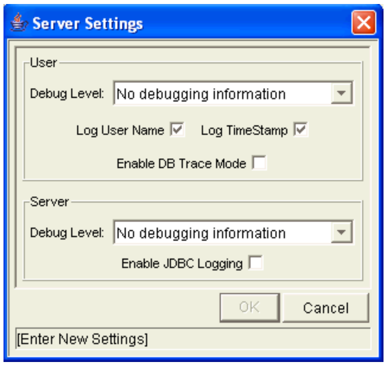
To modify the server settings:

1. Open the Workbench.

   To open the Workbench, see *Getting Started*. The Workbench is displayed.

2. On the Workbench menu, select **Edit > Server Settings.**

   The Server Settings window opens.



3. In the Server Settings window, change the server settings as specified in the following table and click **OK.**

Field	Definition
Debug Level (User)	Sets the debug level for the client. The following lists the options of the Debug Level (User) field: • **No debugging information.** System debug level is set to NONE. Only critical events are written to the log file. • **Normal debugging information.** System debug level is set to LOW. System performance is degraded. • **Maximum debugging information.** System Debug level is set to HIGH. System performance is degraded.
Log User Name	Sets whether to include the username in the log file.
Log TimeStamp	Sets whether to enable a timestamp in the log file.

Field	Definition
Enable DB Trace Mode	Sets whether to enable the database trace mode.
Debug Level (Server)	Sets the debug level for the client. The following lists the options of the Debug Level (Server) field: • **No debugging information.** Server debug level is set to NONE. Only critical events are written to the log file. • **Normal debugging information.** Server debug level is set to LOW. System performance is degraded. • **Maximum debugging information.** Server Debug level is set to HIGH. System performance is degraded.
Enable JDBC Logging	Sets whether to enable JDBC.

The server settings are saved.

Appendix A
Mercury-Supplied Portlets

Mercury-Supplied Portlet Overview

This appendix lists all of the available Mercury-supplied portlets. Some of you will not be able to access all of the portlets listed here. Portlet access depends upon licenses and access grants.

Financial Management Portlets

Table A-1. Financial Management portlets

Financial Management Portlets	Description
Capitalized Project Breakdown	Lists relevant information about capitalized projects. Can be filtered so show the same projects as the following portlets: • Total Exposure • Impairment Risks • Capitalized Project Timelines
Capitalized Project Timelines	Graphical display of projects with capitalized costs showing: • Start date • End date • Health
Impairment Risks	Graphical display of active projects having capitalized costs, chosen by project health and broken out by project.
Project Cost Summary	Lists cost information for a program.
Program Cumulative Cost Metrics	Trend chart analyzing the cumulative cost metrics for a program. Line graphs indicate historical values of important cost parameters. Budget actuals include the total baseline planned cost and the estimated actual cost at completion.
Program Current Cost Metrics	Bubble chart analysis of the current cost metrics for a program. Analyzes the current cost metrics for a program. Shows current cost status of a project or current cost status of a program.

Table A-1. Financial Management portlets [continued]

Financial Management Portlets	Description
Project Budget and Staffing Profile vs. Actuals	Compares budget and staffing profile plans to the actual cost and resource usage of running projects. Values are for the entire project to date. Provides Dashboard-level oversight into the status of a group of projects. Intended users are PMO staff or external stakeholders. Budgeted values for cost and hours are drawn from a budget, not from a project baseline. Actuals for costs are gathered from the budget. Actuals for hours are aggregate from tasks assignments and tasks actuals on the project linked to the budget. Percent complete is also drawn from the project actuals.
Project Cost Summary	List of cost information for a project.
Project Cumulative Cost Metrics	Trend chart analyzing the cumulative cost metrics for a project. The trend chart contains line graphs indicating historical values of important cost parameters. Budget actuals include the total baseline planned cost and the estimated actual cost at completion.
Project Current Cost Metrics	Bubble chart analysis of the current cost metrics for a project. Can be used to show current cost status of a project or current cost status of a program.
Total Exposure	Graphical view of active projects that have capitalized costs grouped by the health of the project.

Packages Portlets

Table A-2. Packages portlets

Packages Portlets	Description
My Packages	Lists all packages created by or assigned to you. Provides a critical view into the most pressing packages.
Package Activity	Lists activity information about the number of deployments (package line execution step transactions) completed during the last three weeks.
Package List	Lists general information about packages, such as description and status.
Package References	Lists references attached to package. Filters include: • Reference types • Relationship • Time period
Package Summary Bar Chart	Bar chart summary of packages including priority and the total number of packages for each category.
Package Summary Pie Chart	Pie chart summary of packages, including priority and the total number of packages for each category.
Pending Deployment	Lists general information about packages which have not been deployed. Provides visibility into scheduled or required package migration.

Portfolio Management Portlets

Table A-3. Portfolio Management portlets

Portfolio Management Portlets	Description
Budget Summary	Stacked bar chart showing the budget summary of a what-if scenario from an existing scenario comparison. Each graph displays capital and operating expense. If there is a total available budget specified for the scenario comparison, it is displayed as the capacity line.
Budget To Budget Comparison	Stacked bar chart comparison of allocated budgets. Compares of one or more allocation budgets.
Budget by Asset Class	Bar chart analysis showing the breakdown of budget by asset class for a what-if scenario from an existing scenario comparison. Adjacent bars represent each asset class in each period.
Budget by Business Objective Portlet	Bar chart analysis showing the breakdown of budget by business objective for a what-if scenario from an existing scenario comparison. Adjacent bars represent each business objective in each period.
Budget by Project Class	Bar chart analysis showing the breakdown of budget by project class for a what-if scenario from an existing scenario comparison. Adjacent bars represent each project class in each period.
Capitalized Project Breakdown	Lists relevant information about capitalized projects. Can be filtered so show the same projects as the following portlets: • Total Exposure • Impairment Risks • Capitalized Project Timelines
Capitalized Project Timelines	Graphical display of projects with capitalized costs showing their start dates, end dates and health.
Cost Benefit Analysis	Bar chart analysis of the cost-benefit for a what-if scenario from an existing scenario comparison.
Current Portfolio Map	Bubble chart of the current portfolio of projects and assets.

Table A-3. Portfolio Management portlets [continued]

Portfolio Management Portlets	Description
Impairment Risks	Graphical view of active projects that have capitalized costs, chosen by project health and broken out project.
Portfolio by Category	Graphical view of monetary metrics of projects and assets in the current portfolio.
Resource by Category	Graphical view of resource requirements and availability of projects and assets in the current portfolio.
Total Budget	Graphical view showing budget requirement and availability for all what-if scenarios from an existing scenario comparison.
Total Exposure	Graphical view of active projects that have capitalized costs grouped by the health of the project.
Total Resource	Graphical view showing resource requirements and availability for all what-if scenarios from an existing scenario comparison.

Program Management Portlets

Table A-4. Program Management portlets

Program Management Portlets	Description
Program List	Displays general information and summary conditions for programs.

Projects Portlets

Table A-5. Projects portlets

Projects Portlets	Description
My Tasks	Lists all project tasks currently assigned to you and having a scheduled finish date two weeks from the current date.
Program Project List	Lists the projects within a program. The default parameters show all project items for the program. Project items are sorted by the project hierarchy and optionally, by: • Name • Resource • State • Scheduled finish • Project hierarchy
Project Gantt	Gantt chart for all projects, tasks, and milestones.
Project List	Lists general information about projects, such as how close they are to completion and their scheduled finish date. Information displayed can be based on project name or other project related criteria.
Project Summary Pie Chart	Pie chart summary of projects grouped by their summary condition. Filter the data by a set of specific projects and subprojects, or filter by department and/or project manager.
Resource Gantt	Gantt chart for resources showing work items including: • Requests • Tasks • Milestones • Staffing Profiles

Requests Portlets

Table A-6. Requests portlets

Requests Portlets	Description
Assignment Queue	Lists the demand not assigned to a resource. Can assign a resource to a demand from the portlet.
Consolidated Demand	Graphical overview of the demand placed on an organization.
Demand by Category	Graphical summary of the demand placed on an organization, grouped by common demand categories.
Demand List	Personalized list of the demand placed on an organization or individual. Displays demand based on demand type, priority, and so forth
My Requests	Lists all requests created by or assigned to you. Provides a critical view into the most pressing requests nearing deadlines.
Open Requests by Priority	Bar chart of the number of requests currently open, grouped by priority. Provides a graphical representation of a business' open issues.
Program Issue List	Lists the open issues of a program. Can filter program issues based on project, escalation level, or other program related criteria.
Program Resource List	Lists the open resource requests for a program.
Program Risk List	Lists open risks of a program. Can filter program risks based on project, escalation level, or other program related criteria.
Program Scope Change List	Lists open scope changes of a program. Tasks and project name are displayed, as well as the values for the project and baseline of: • Scheduled Start • Scheduled Finish • Scheduled Duration • Scheduled Effort.

Table A-6. Requests portlets [continued]

Requests Portlets	Description
Request Activity	Lists general activity information such as the number of requests opened and closed during the last two weeks. Provides visibility into high traffic request types as well as the groups or users assigned to address them.
Request List	Lists general information about requests, such as their description and status. Can filter information based on specific request numbers or other request related criteria.
Request References	List the references attached to a request. Can filter based on reference types, relationship, and the time period when they were added.
Request Summary	Lists information about groups of requests, such as: • Priority • Type • Status • Total number of requests for each category
Request Summary Bar Chart	Bar chart summary of requests. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of requests the bar represents.
Request Summary Pie Chart	Pie chart summary of requests. Click on a slice to return a list of requests the slice represents.
SLA Exception Roll Up	Lists the open requests that have triggered SLA exceptions. Lists the active SLAs related to a demand, highlighting violations in red.

Resource Management Portlets

Table A-7. Resource Management portlets

Resource Management Portlets	Description
Analyze Assignment Load	Compares capacity [(resource calendars) X (resource workload capacity)] to assignments, such as requests, and staffing profiles marked “treat as assignments.” Use to assess upcoming load on resources, in support of manual load leveling.
Analyze Resource Pools	Compares capacity (active resource pools) to load (lines on active staffing profiles drawing from these resource pools). Used to assess planned load on resource pools, in support of strategic resource planning.
Compare Project and Staffing Profile	Compares a project to the staffing profile. Compares capacity (as the set of active staffing profiles for a project) to assignments within the project. Monitors compliance of the project plan and actuals to the agreed staffing levels for the project.
Current Resource Load by Organization	Displays the current resource load by organization. Organization unit or skill name is a link to the related detail page. To support breakdowns, sort the list by the organization hierarchy structure.
Current Resource Load By Skill	Displays the current resource load by skills. Shows a snapshot of current load on a set of resources, broken down by the skill required by the work item. When a skill is not specified during, it will default to the resource’s primary skill.
Resource Pool List	Lists information regarding resource pools.
Staffing Profile List	Lists staffing profiles. Filter to display a specific staffing profile.

Time Management Portlets

Table A-8. Time Management portlets

Time Management Portlets	Description
Time Sheet Approvals	Lists time sheets ready for review and approval. Designed for managers and time sheet reviewers.
Time Sheets Delinquent	Lists users who have not submitted their time sheets for a given period. Designed for managers and time sheet reviewers.
TMG - Actuals for Direct Reports	Lists the total time entered by all the direct reports for a manager or set of managers.
TMG - My Time Sheets	Lists your time sheets during the last 10 time periods.
TMG - My Work Items	Lists all work items created by or assigned to you. Provides a critical view into the most pressing work items nearing deadlines.
TMG - Resource Group Total by Work Item	Lists the time charged by resource groups, summarizing the totals of all resources for that resource group. Filter for a particular organization unit and the organization units beneath this unit, to display a departmental summary and team breakdown. Provides Dashboard-level summary of upcoming load. Designed for PMO staff or middle managers responsible for coordinating several teams.
TMG - Resource Group Totals	Lists the time charged by resource groups, summarizing the totals of all the resources in those resource groups.
TMG - Resource Totals	Lists the time charged by a set of resources, displaying the level of activity in the current and previous period for the resources.
TMG - Total Hrs by Work Item	Lists detailed information on the time allocated to and the time charged for specific work items. Not used to display information for all work items but for work items meeting a specific criteria.

Table A-8. Time Management portlets [continued]

Time Management Portlets	Description
TMG - Work Allocation Details	Lists summary information on the defined work allocations. Used to see which work allocations are close to or are actually over the budget.
TMG - Work Item Set Budgets and Actuals	Lists summary information at the work item set level. Provides a snapshot of which projects or types of activities users are spending the most time on, as well as where the most time is budgeted. Values are for the entire project to date (as opposed to period-by-period). Provides Dashboard-level oversight into the status of a group of projects. For PMO staff or external stakeholders.

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