Mercury IT Governance Center™

Mercury IT Service Management Accelerator™ Guide

Version: 3.0

MERCURY™

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Chapter

1 Introduction

In This Chapter:

About This Document

This document contains information on using the Mercury IT Service Management Accelerator™.

This document contains the following chapters:

- Chapter 1, *Introduction,* on page 11

  Includes an overview of Mercury IT Service Management Accelerator and details the document's intended audience and related guides.

- Chapter 2, *Installing and Configuring the Accelerator,* on page 17

  Details instructions for installing the Accelerator and configuring Mercury IT Governance Center™ to ensure that the Accelerator functions properly.

- Chapter 3, *ITIL Change Management,* on page 27

  Includes an overview of the ITIL Change Management process and how it is handled by the Accelerator, and details the entities provided by the Accelerator relating to ITIL Change Management.

- Chapter 4, *ITIL Release Management,* on page 79

  Includes an overview of the ITIL Release Management process and how it is handled by the Accelerator, and details the entities provided by the Accelerator relating to ITIL Release Management.

Who Should Read This Document

This book is for the following audience types:

- End users
- Application developers/configurators

For More Information

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

Related Documents

Related documents for this book are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*
- *Mercury Demand Management User's Guide*
- *Mercury Change Management User's Guide*

For More Information

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

Overview of Mercury IT Service Management Accelerator

The Information Technology Infrastructure Library (ITIL®) offers the world's most widely accepted approach to IT Service Management, furthering the goal of aligning IT with business goals and priorities. ITIL provides frameworks for both the organization of IT Service Management (ITSM) as well as a cohesive set of industry best practices.

ITIL is a process framework, and the Mercury IT Governance Center is unique in its ability to customize, automate, and digitize processes, simplifying repeatability, enforcement, and measurement.

ITIL defines the Service Support discipline. To this advanced-process model the Mercury IT Service Management Accelerator adds the fundamental ability to digitize the Service Support lifecycle, automating processes and information gathering with predefined workflows and forms, as well as tracking key performance indicators (KPIs) with portlets and reports. These entities are provided as out-of-the-box templates to help accelerate the implementation of these ITIL processes. This version of the Accelerator focuses on supporting the following ITIL processes:

- Change Management
- Release Management

The Accelerator can be used as a starting point, and then extended to support the process requirements that meet the specific needs of the organization. Using these tools, the Accelerator helps enforce repeatable ITIL processes to reduce their operating cost and risk.

Note

The ITIL processes included with the Accelerator have embedded financial oversight controls specifically to address Sarbanes-Oxley (SOX) Section 404 requirements. These controls are described in this document in *italics* in order to be easily identified.

While the controls included are typical of those necessary for SOX compliance, each company's requirements for SOX are different. A company's auditors are the final arbiters of what specific controls are sufficient.

What's New in Version 3.0

The Accelerator features optional integrations with Mercury Quality Center™, Mercury Change Control Management™, Mercury Business Availability Center™, and Mercury Application Mapping™ for streamlined creation of test requirements, test plans, and impact analyses. Additionally, the Accelerator includes Change Management forms and processes for optional integration with Mercury Change Management Extension for Oracle E-Business Suite™, Mercury Change Management Extension for SAP® Solutions™, and third-party help desk systems through Mercury Service Desk Adapter™. For ITIL Release Management, the Accelerator features optional integrations with Mercury Quality Center, Mercury Dashboard™, and Mercury Business Availability Center that enhance change assessment after release.

The Accelerator is one part of Mercury's comprehensive, integrated, end-to-end solution for IT service management. Some processes, previously supported by the Accelerator, are no longer supported in version 3.0, but instead are provided robust support by other Mercury products.

The following processes are no longer supported in the Accelerator:

- Incident Management
- Problem Management
- Service Level Management

Contact your Mercury sales representative for details about support for these and other key ITIL processes.

If you are upgrading from version 2.0 of the Accelerator, the aforementioned processes will continue to function normally; issues related to these processes will be handled by Mercury Customer Support for an additional 18 months after the release of version 3.0.

Version 3.0 of the Accelerator also features improvements to the Change and Release Management workflows, portlets, and Mercury IT Governance Dashboard™ modules.

Chapter

2

Installing and Configuring the Accelerator

In This Chapter:

System Requirements

To use the Mercury IT Service Management Accelerator you must have an installed version of Mercury IT Governance Center release 6.0 Service Pack 10 (or later).

Upgrading from Earlier Versions of the Accelerator

The following items should be addressed before beginning the installation of the Accelerator:

1. Make a backup copy of the version 2.0 Accelerator guide. The new 3.0 guide does not describe the use of the Incident, Problem, or Service Level Management processes. On installation, the 3.0 guide will overwrite the 2.0 guide.

2. To ensure that the installation properly upgrades your Change and Release Management workflows, request types, and request header types, rename your existing versions to something distinct from their originally-installed names.

3. Several other entities included with the Accelerator, such as portlets, include improvements to prior versions. If you would like to take advantage of these changes, rename your existing entities to something distinct from their originally-installed versions. *Table 2-1* lists the entities that should be renamed in order to be upgraded.

Table 2-1. Entities that require renaming for upgrade to 3.0 (page 1 of 3)

Entity Type	Entity Name
Module	Change Manager
	Release Manager

Table 2-1. Entities that require renaming for upgrade to 3.0 (page 2 of 3)

Entity Type	Entity Name
Portlet	My Releases
	Open Releases
	Releases by Category
	Releases by Type
	Open RFCs
	RFCs by Status List
	SOX - Completed RFCs by Risk
	SOX - Completed RFCs by Risk List
	SOX - Rejected RFCs by Priority
	SOX - Rejected RFCs by Priority List
	SOX - Emergency RFCs by Status
	SOX - Emergency RFCs by Status List
	SOX - High Risk (Non Emergency) RFCs by Status
	SOX - High Risk (Non Emergency) RFCs Status List

Table 2-1. Entities that require renaming for upgrade to 3.0 (page 3 of 3)

Entity Type	Entity Name
Data Source	My Releases
	My RFCs
	Open Releases
	Open RFCs
	Release List
	Release by Category
	Release by Type
	RFCs by Category
	RFCs by Priority
	RFCs by Status
	RFCs by Status List
	SOX - Completed RFCs by Risk
	SOX - Completed RFCs by Risk List
	SOX - Emergency RFCs by Status
	SOX - Emergency RFCs Status List
	SOX - High Risk (Non Emergency) RFCs by Staus
	SOX - High Risk (Non Emergency) RFCs Status List
	SOX - Rejected RFCs by Priority
	SOX - Rejected RFCs by Priority List

Installing the Mercury IT Service Management Accelerator

To install the Mercury IT Service Management Accelerator:

1. Be sure Mercury IT Governance Center is running in restricted mode.

   For more information about running Mercury IT Governance Center in restricted mode, see the *System Administration Guide and Reference.*

2. From the Mercury IT Governance Download Center, download the following bundle:

   `mitg-600-ITSM30.jar`

3. Copy the `mitg-600-ITSM30.jar` file to the `<ITG_Home>` directory.

   The `<ITG_Home>` directory refers to the root directory where Mercury IT Governance Center is installed.

> **Note:** You do not need to unpack the installation file. The installation process automatically unpacks it.

4. Navigate to the `<ITG_Home>/bin` directory.

5. Run the script:

   ```
   sh kDeploy.sh -i ITSM
   ```

6. As `kDeploy.sh` runs, respond to prompts.

7. Stop and restart Mercury IT Governance Center in normal mode.

   For more information about running Mercury IT Governance Center in normal mode, see the *System Administration Guide and Reference.*

8. Start the Mercury IT Governance Server.

Configuring Mercury IT Governance Center Entities

The Mercury IT Service Management Accelerator includes certain Mercury IT Governance Center entities that need to be configured in order for the Accelerator to function properly.

Create Contact User Data

A global user data field of type **Contact User Data** should be created. *Table 2-2* describes the important parameters for this field. *Figure 2-1* shows the User Data Context window.

Table 2-2. Contact user data field parameters

Field Name	Value
Prompt	Location:
Token	LOCATION
User Data Column	USER_DATA1
Displayed	Y
Component Type	Text Field
Validation	(any text field of reasonable length)

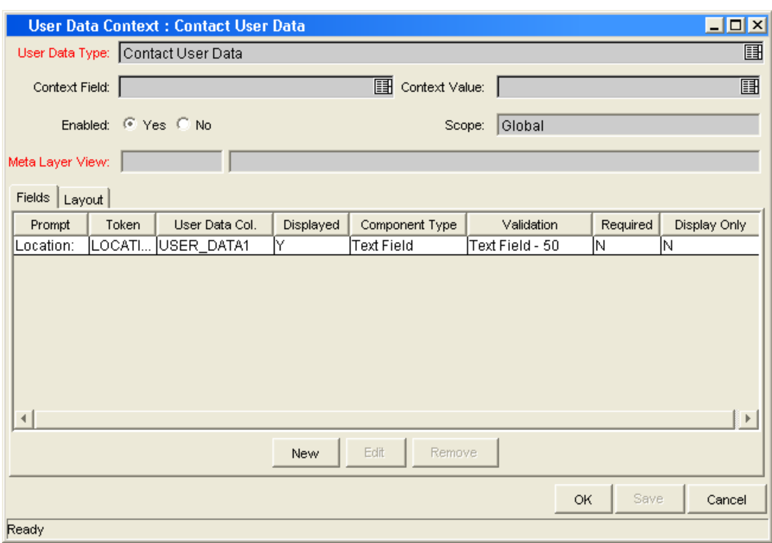


Figure 2-1. Contact user data field

Configure Priority Validation

The validation **CRT - Priority - Enabled** should have extra values added to it, listed in *Table 2-3*. *Figure 2-2* shows the Validation window.

Table 2-3. CRT - Priority - Enabled validation values

Code	Meaning
MEDIUM	Medium
IMMEDIATE	Immediate
PLANNING	Planning

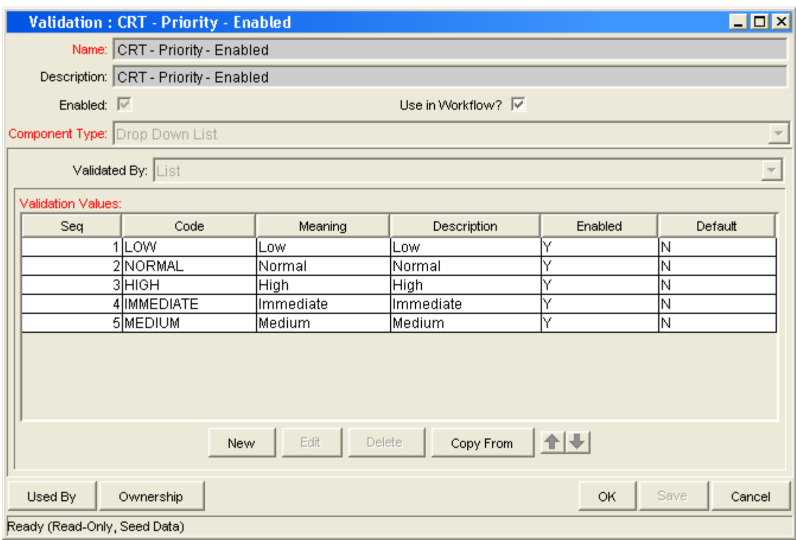


Figure 2-2. CRT - Priority - Enabled validation

Assign Users to Security Groups

The Mercury IT Service Management Accelerator includes several security groups, listed in *Table 2-4*. Users should be added to these security groups.

Table 2-4. Accelerator security groups

Security Group
Applications Development Manager
CAB group (Change Advisory Board)
CAB/EC group

Table 2-4. Accelerator security groups [continued]

Security Group
Change Builder
Change Manager
Customer Relation Staff
Independent Tester
IT Executive Board
Operations Manager
QA Manager
Release Manager
Technical Consultants
System Owner (SOX role)

Assign Security to Workflows

The Mercury IT Service Management Accelerator includes several workflows, of which the major ones are described in detail in this document. Security groups should be assigned to each workflow step in the manner that best suits your business needs.

For More Information

The request types, workflows, portlets, and reports provided with the Mercury IT Service Management Accelerator can be further configured to fit your business needs. *Table 2-5* lists the Accelerator entities and the corresponding configuration guides you should read in order to properly adjust them.

Table 2-5. Mercury IT Governance entities and configuration guides

Entity	Configuration Guide
Request type	*Mercury Demand Management: Configuring a Request Resolution System*
Workflow	*Mercury Demand Management: Configuring a Request Resolution System*
Portlet	*Configuring the Standard Interface*
Report	*Reports Guide and Reference*

Chapter

3

ITIL Change Management

In This Chapter:

Overview of ITIL Change Management

In ITIL, a *change* is defined as: The addition, modification, or removal of approved, supported, or baselined hardware, network, software, application, environment, system, desktop build, or associated documentation. The primary goal of the ITIL Change Management process is to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes in order to minimize the impact of change-related incidensts upon service quality. Although changes often arise as a result of unplanned problems, the majority result from planned requests for change (RFC) from the business or IT organization.

The Mercury IT Service Management Accelerator enables users to submit RFCs along a predefined Request For Change process toward resolution. Portlets delivered with the Accelerator can be added to a user's Mercury IT Governance Dashboard and used to monitor some of the key performance indicators (KPIs) related to the submitted RFCs. Additionally, reports can be run to obtain summaries and scheduling details.

This chapter discusses the Mercury IT Governance Center entities provided for use in the ITIL Change Management process by the Mercury IT Service Management Accelerator, including:

- Change Management request type (Request For Change)
- Change Management workflow
- Change Management portlets
- Change Management reports
- Optional integrations for Change Management

Change Management Roles

The following roles play an active part in the ITIL Change Management process:

- System Owner
- Change Manager
- CAB group (Change Advisory Board) or CAB/EC group (Change Advisory Board – Emergency Committee)
    - *System Owner (SOX role)*
    - Change Manager
    - Customer(s)
    - User manager(s)
    - Applications Development Manager
    - QA Manager
    - Operations Manager (or maintainers where appropriate)
    - Technical consultants
    - Problem Manager
    - Service Level Manager
    - Customer Relations staff
- Change Builder
- Independent Tester
- Applications Development Manager

Aside from being valuable divisions of responsibility, these roles are used to designate user security for the default *Request for Change Workflow*.

Request for Change

The ITIL Change Management process as modeled by the Mercury IT Service Management Accelerator sends a Request For Change (RFC) along the *Request for Change Workflow* to be examined and resolved. *Table 3-1* describes the fields contained in the Request For Change entity.

Table 3-1. Request For Change fields (page 1 of 3)

Field Name	Description
RFC Summary	
Created By	The user who created the RFC.
RFC Status	The status of the RFC.
Contact Name	The name of the person proposing the change.
Contact Phone	The telephone number of the person proposing the change.
RFC Priority	The priority of the change request; determined by a combination of Urgency and Impact. *SOX requirement: Aside from Emergency changes, High Risk changes must be reviewed by the Change Committee.*
Contact E-mail	The email address of the RFC contact person.
Contact Location	The location of the person proposing the change.
RFC Summary	A summary of the RFC request.
RFC Details	
RFC Source	The source of RFC request (for example, from a problem or incident).
Urgency	The urgency of the change request (for example, from problem urgency). *SOX requirement: Emergency Change procedure is followed if a business-critical application is down with no workaround. This would be determined in an earlier process before the RFC is submitted.*
Impact	The business impact of doing or not doing the change (for example, from problem impact). *SOX requirement: SOX requires impact analysis relating specifically to the business risk of doing or not doing the change.*

Table 3-1. Request For Change fields (page 2 of 3)

Field Name	Description
Reason For Change	The reason for the change.
Category	The change category; based on the scope of change
RFC Type	The type of change being requested.
Change Item	The identity of item(s) to be changed (including configuration item (CI) identification(s) and version number if Configuration Management system is in use).
Service	The IT service that needs this change.
Effect of no change	The effect of not implementing the change.
RFC Description	The description of the change request.
SOX Information	
System	*The system that is impacted by the change.*
SOX In-Scope System	*SOX requirement: SOX oversight is required for any application that directly or indirectly affects financial reporting.*
SOX Risk	*SOX requirement: Risk is determined as part of SOX oversight.* *Note: It is possible a change to a non-SOX system could be high-risk based on possible infrastructure/network impact.*
Impact & Resource Assessment	
Impact Assessment Summary	The risk assessment of the change’s impact on related components in CMDB. *SOX requirement: This is considered in determining risk based on potential infrastructure and application impact.*
Impact Assessment Report	Enables the user to attach the impact assessment report directly to the RFC.
Expected Duration	The expected duration for creation of the change.
Expected Effort	The expected effort for creation of the change.
Expected Cost	The expected cost of the change.
Backout Plan	Enables the user to attach the backout plan document directly to the RFC. *SOX requirement: SOX requires a backout plan to keep business-critical systems running as much as possible.*

Table 3-1. Request For Change fields (page 3 of 3)

Field Name	Description
CAB Recommendations	CAB recommendations, where appropriate.
Users Impacted	The users expected to be impacted by the change.
Implementation Details	
Actual Start Date	The actual start date for the creation of the change.
Actual Finish Date	The actual finish date for the creation of the change.
Actual Duration	The actual duration of the creation of the change.
Actual Effort	The actual effort expended during creation of the change.
Assigned Change Builder	The details of change builder/implementer.
Actual Cost	The actual cost of the change.
Functional Specifications	Enables the user to attach the functional specification document directly to the RFC.
Design Specifications	Enables the user to attach the design specification document directly to the RFC.
QA Details	
Assigned Tester	The person assigned to test the change.
Test Plan	Enables the user to attach the test plan directly to the RFC.
Detailed Test Results (SOX)	Enables the user to attach the detailed test results directly to the RFC.
Review Summary	
Review Date	The review date for the change.
Review Summary	The summary of the review for the change.

Using the Request for Change

To submit a Request For Change:

1. Log on to Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

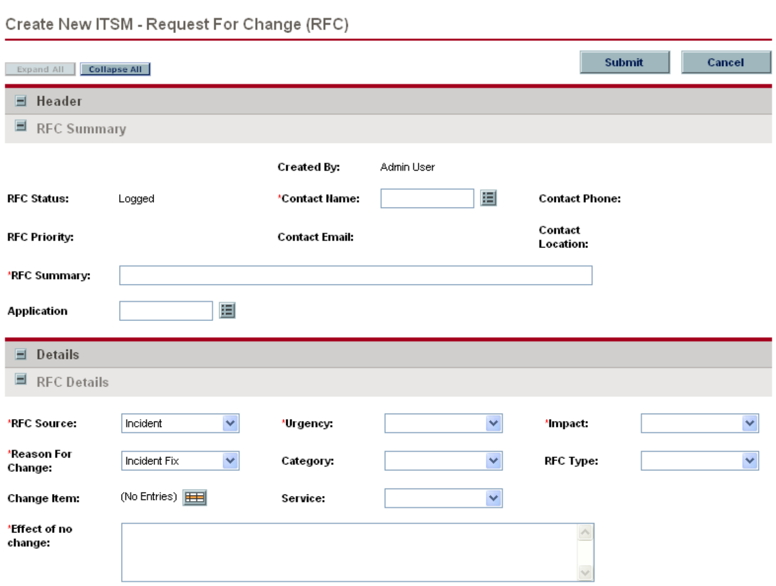
2. From the menu bar, select **Create > Request.**

   The Create From Available Request Types page appears.

3. In the Create From Available Request Types page, from the Request Type drop down list, select **ITSM - Request for Change (RFC).**

4. In the Create From Available Request Types page, click **Create.**

   The Create New Request page appears, displaying the appropriate RFC fields.



5. In the Header section, complete the fields as required.

   Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing an open request. For information concerning a specific field, click the **Help** icon next to the field (if available).

6. In the Details section, complete the fields as required.

7. In the Notes section, enter additional information.

   The Notes section contains fields where notes and information concerning the RFC can be entered and stored. Typically, when creating an RFC, you do not need to add a note to the RFC. However, add a note if you want to convey additional information to the reviewers and processors of the RFC.

8. In the References section, add references to the request.

   In some cases it might be useful to reference a Web-accessible file or attach a document or file from a local machine to the RFC. Additionally, other entities such as packages, releases, or other related requests may be automatically referenced based on the workflow steps that have been executed. For more information on adding references, see the *Mercury Demand Management User's Guide.*

9. In the Create New Request page, click **Submit.**

   The RFC is submitted. The Request Creation Confirmed page appears.

> Note: Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated RFC's detail page.

Once the RFC has been submitted, it is assigned an initial status, such as New. It is then routed along the *Request for Change Workflow*.

Request for Change Workflow

The Request For Change workflow is the sequence of approvals, decisions, or actions that the Request For Change is processed along. The RFC starts at the beginning of the RFC workflow; when it reaches the end of the workflow, its lifecycle is complete. *Figure 3-1* shows the RFC workflow. *Table 3-2* lists the important steps in the RFC workflow and the user roles associated with each.

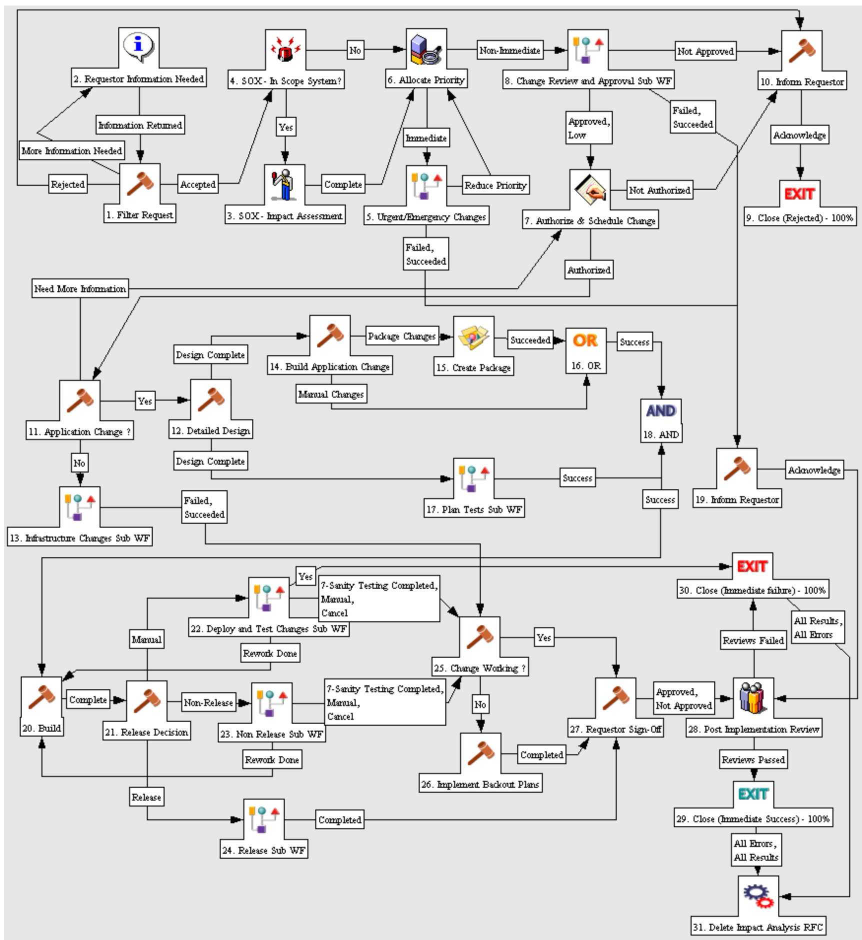


Figure 3-1. Request for change workflow

Table 3-2. Request for change workflow steps (page 1 of 2)

Step Name	User Security	Description
Filter Request	Change Manager	Initial review and classification of change request; determine if this RFC is acceptable based on company policy.
SOX - In Scope System?	*Fully automated step*	*SOX requires identification of key systems related to accurate financial reporting, directly or indirectly. This field is automatically determined based on the system selected.*
SOX - Impact Assessment	*SOX - System Owner*	*SOX requires additional impact assessment for any change that could affect financial reporting. The impact of not doing the change must be considered as well.*
Allocate Priority	Change Manager	Validate RFC priority and determine if this is an Urgent Change request. *SOX Impact Assessment is done here as part of this process and reviewed later.*
Change Review and Approval Subworkflow	N/A	Review and approval process for the RFC, described in *Change Review and Approval Subworkflow* on page 40.
Urgent/ Emergency Changes	N/A	Urgent change process designed to handle emergency changes, described in *Urgent/ Emergency Change Subworkflow* on page 38.
Authorize and Schedule Change	Change Manager	Authorize the change request and schedule change for implementation.
Application Change?	Change Manager	Determine if this is an application change.
Detailed Design	Application Developer	Create functional and design specification documents.
Build Application Change	Application Developer	Build application code for change.
Create Change Package	Application Developer	Create change package with code changes. This step automatically creates a change package and adds it as a reference to the RFC form. *Figure 3-2* illustrates a typical RFC package.

Table 3-2. Request for change workflow steps (page 2 of 2)

Step Name	User Security	Description
Plan Tests Subworkflow	N/A	Test planning process for the RFC, described in *Plan Tests Subworkflow* on page 43.
Build	Change Builder	Build the change, in preparation for implementation. For application change, add code components to the referenced package in the Mercury IT Governance Workbench (See step *Create Change Package*).
Release Decision	Change Manager, Change Builder	Select whether this application change should be implemented as part of a release or independently.
Deploy and Test Changes Subworkflow	N/A	A modular process for deploying and testing changes.
Non Release Subworkflow	N/A	A modular process for change deployment described in *Non Release Subworkflow* on page 45.
Release Subworkflow	N/A	A modular process for change deployment involving releases.
Change Working?	Change Manager	Review change was successfully implemented with no adverse impact.
Implement Backout Plans	Change Builder, Operations Manager	If change is not working, implement backout plans to backout change from LIVE environment. *SOX requirement: SOX requires a backout plan to keep business-critical systems running as much as possible.*
Requestor Sign-Off	Change Manager	Get sign-off from requestor of change to acknowledge that change was implemented.
Post Implementation Review	Change Manager	Review change after implementation to determine whether change process was followed correctly. *SOX requirement: The System Owner and the Change Manager must review to assure proper procedures were followed.*
Exit	Change Manager	Update status to **Closed.** *SOX requirement: Change Manager updates documentation before change is complete.*
Delete Impact Analysis RFC	Fully automated step	Deletes impact analyses related to change.

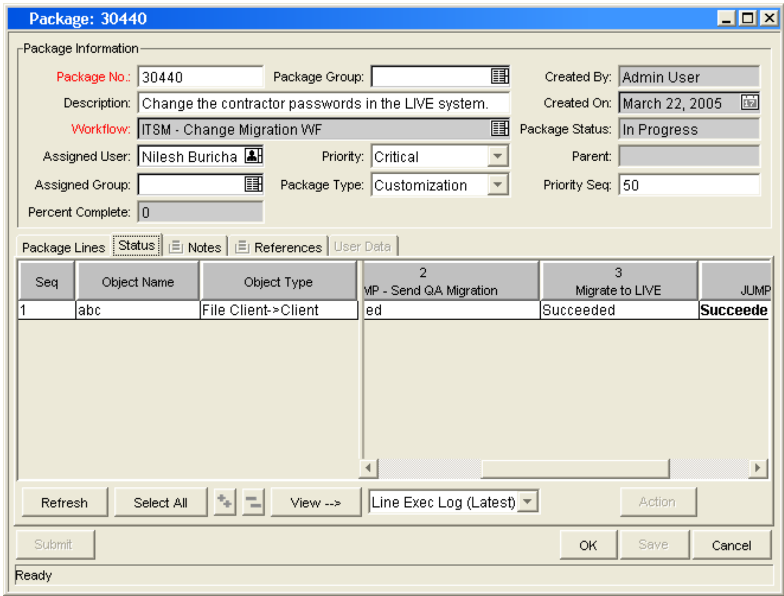


Figure 3-2. Package created by RFC workflow

Urgent/Emergency Change Subworkflow

Both ITIL and SOX require an "Urgent Change" *("Emergency" for SOX)* process.

The common criterion for a SOX Emergency Change is when a business-critical system is down with no workaround.

If a change is categorized as **Urgent,** the Request For Change is routed along the urgent change process. The urgent change subworkflow is designed to efficiently handle impact assessment, SOX scoping, prioritization, and the creation of the change. *Figure 3-3* shows the urgent change subworkflow.

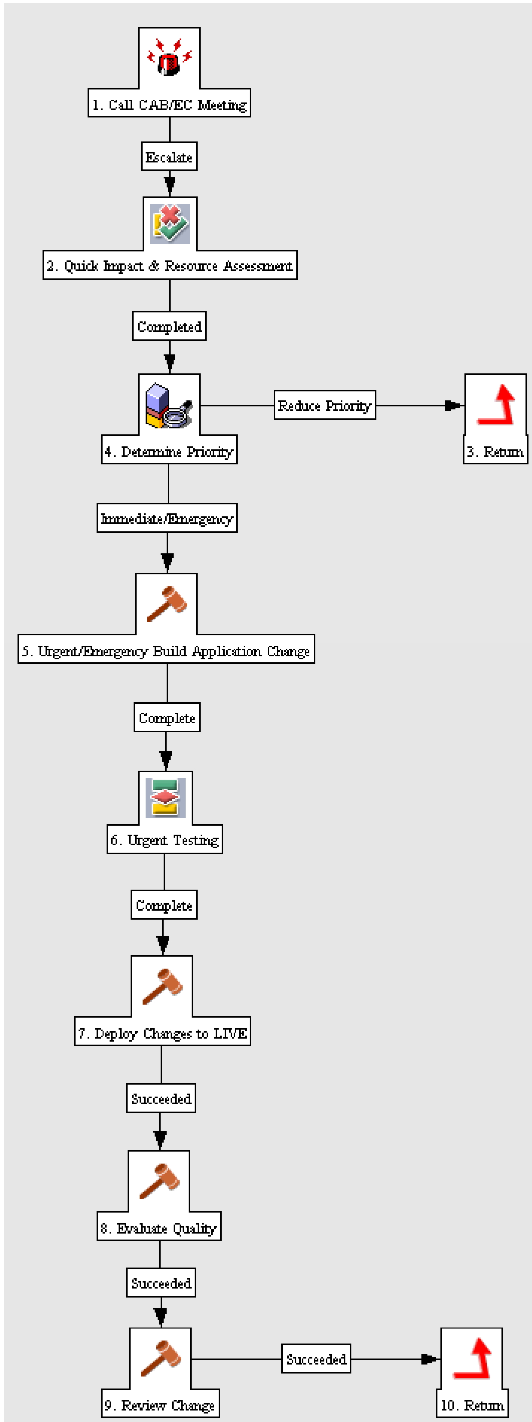


Figure 3-3. Urgent/Emergency change subworkflow

Change Review and Approval Subworkflow

The change review and approval subworkflow provides a modular review and approval process for the Request For Change. *Figure 3-4* shows the change review and approval subworkflow. *Table 3-3* lists the important steps in the change review and approval subworkflow and the user roles associated with each.

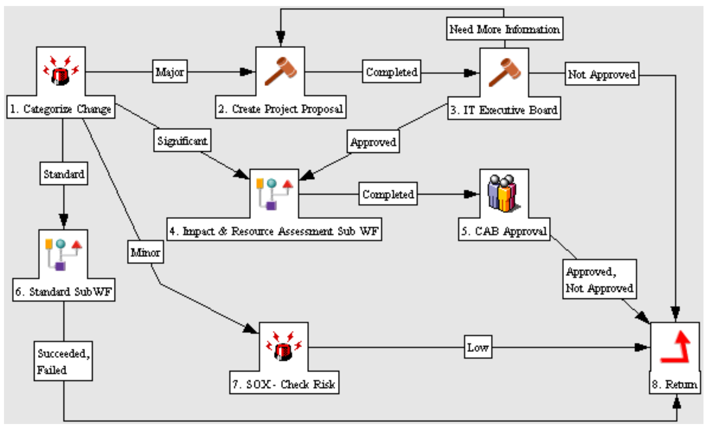


Figure 3-4. Change review and approval subworkflow

Table 3-3. Change review and approval subworkflow steps

Step Name	User Security	Description
Categorize Change	Change Manager	Categorize the change to determine the next step in the workflow.
Create Project Proposal	CAB	If change is classified as “Major,” create a project proposal that includes impact.
IT Executive Board	IT Executive Board	If change is classified as “Major,” an IT Executive Board is responsible for approving the change.
Impact & Resource Assessment Sub WF	N/A	If change is classified as “Significant,” determine impact on dependent infrastructure components and estimate resources time and cost. See *Impact and Resource Assessment Subworkflow* for details. *Within SOX, the impact analysis of Emergency Changes and Low Risk/High Priority Changes is reviewed/signed off by the IT Application & Business Application Owners.* For Committee Changes, the Impact Analysis is reviewed & signed off within the Committee.

Table 3-3. Change review and approval subworkflow steps [continued]

Step Name	User Security	Description
CAB approval	CAB Members	Iterative review by CAB members, resulting in authorization go/no go decision (includes change priority, schedule, impact, and cost). *SOX Emergency Changes do not wait for CAB. The IT Application Owner and Business Application Owner Assess Risk, determine whether this is an Emergency Change, and approve the change if so. The CAB reviews the change in next weekly meeting. SOX (PO11-8) Notification is sent to users about schedule change outside of scheduled maintenance window (high priority or emergency change).*
Standard SubWF	N/A	A subworkflow to track standard changes.

Impact and Resource Assessment Subworkflow

The impact and resource assessment subworkflow provides a modular process for assessing change impact and planning resource usage. *Figure 3-5* shows the impact and resource assessment subworkflow. *Table 3-4* lists the important steps in the impact and resource assessment subworkflow and the user roles associated with each.

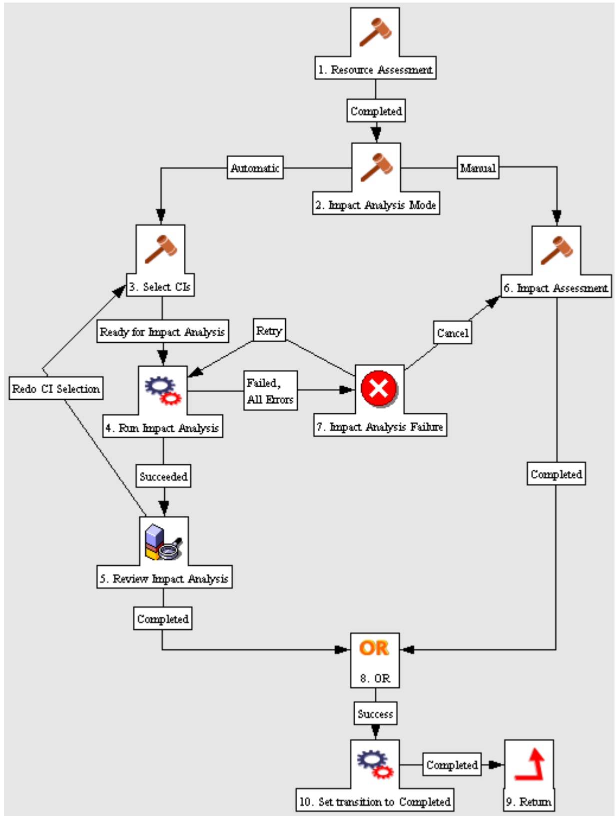


Figure 3-5. Impact and resource assessment subworkflow

Table 3-4. Impact and resource assessment subworkflow steps

Step Name	User Security	Description
Resource Assessment	Change Manager	Estimate resources' time and cost.
Impact Analysis Mode	Change Manager	Determine the method of impact analysis; can be either automatic through Mercury Application Mapping or manual.
Select CIs	Change Manager	The user selects the CIs that will be part of the change.
Run Impact Analysis	Change Manager	Run Impact Analysis on the CIs that were selected in the "Select CIs" step.
Impact Analysis Failure	Change Manager	Notes any error that occurs while submitting the Impact Analysis report in the Mercury Application Mapping server.

Table 3-4. Impact and resource assessment subworkflow steps [continued]

Step Name	User Security	Description
Review Impact Analysis	Change Manager	Review of the request, the list of selected CIs and the Impact Analysis reports. The user can either finally approve the change based on the impact report or reject the change. In addition, the user can compare different Impact Analysis reports.
Impact Assessment	Change Manager	Manual Impact Analysis process for the requested change.

Plan Tests Subworkflow

The plan tests subworkflow provides a modular process for planning tests that integrates automatically with Mercury Quality Center. If no integration exists, a manual process is also provided. *Figure 3-6* shows the plan tests subworkflow. *Table 3-5* lists the important steps in the plan tests subworkflow and the user roles associated with each.

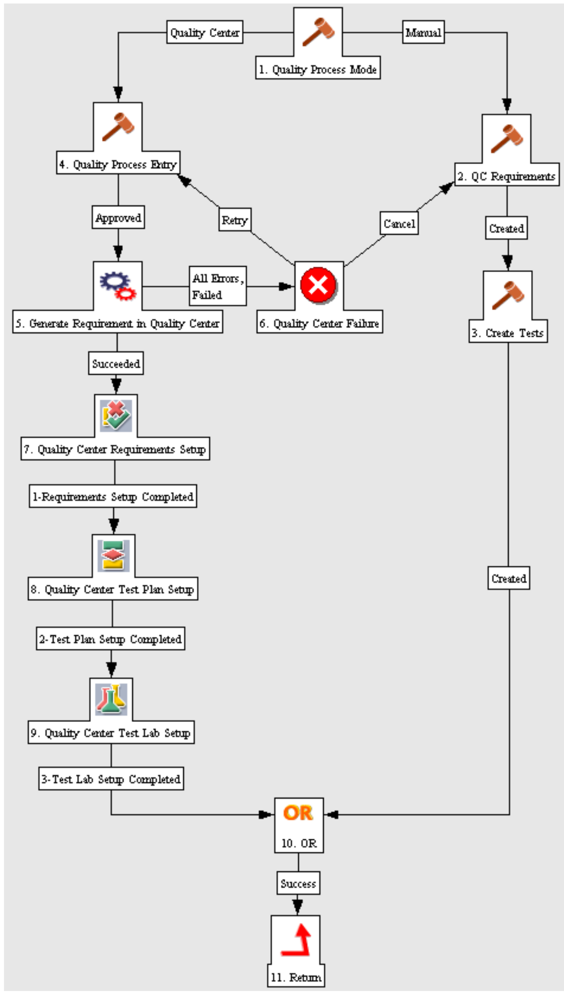


Figure 3-6. Plan tests subworkflow

Table 3-5. Plan tests subworkflow steps

Step Name	User Security	Description
Quality Process Mode	QA Manager	Determine the method of test planning; can be either automatic through Mercury Quality Center or manual.
Quality Process Entry	QA Manager	The quality process entry needs to be approved for integration with Mercury Quality Center.

Table 3-5. Plan tests subworkflow steps [continued]

Step Name	User Security	Description
Generate Requirement in Quality Center	QA Manager	Automated step that generates a requirement in Mercury Quality Center.
Quality Center Requirements Setup	QA Manager	QA to complete requirement setup in Mercury Quality Center.
Quality Center Test Plan Setup	QA Manager	QA to complete Test plan setup in Mercury Quality Center.
Quality Center Test Lab Setup	Independent Tester	QA to complete Test lab setup in Mercury Quality Center.
QC Requirements	QA Manager	Create Test requirements (in Mercury Quality Center).
Create Tests	QA Manager	Create Test Plans in Mercury Quality Center.

Non Release Subworkflow

The non release subworkflow provides a modular process for the change deployment that integrates automatically with Mercury Quality Center. If no integration exists, a manual process is also provided. *Figure 3-7* shows the non release subworkflow. *Table 3-6* lists the important steps in the non release subworkflow and the user roles associated with each.

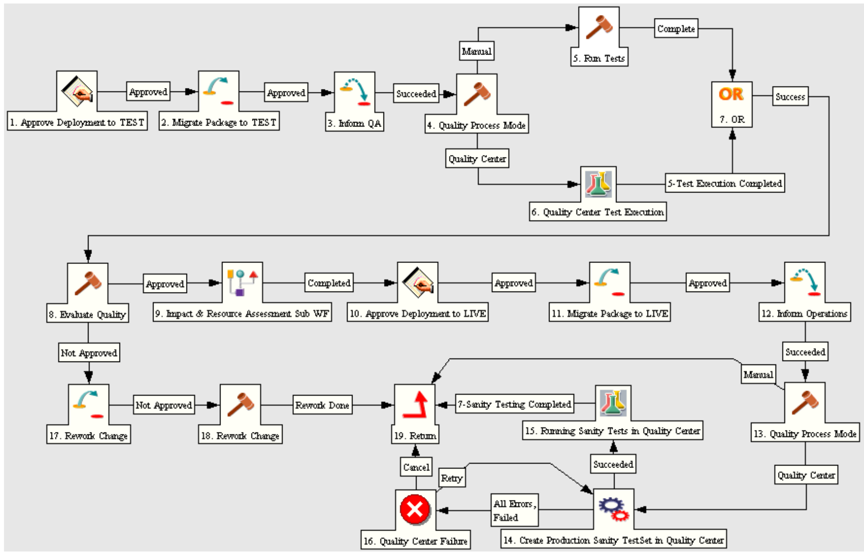


Figure 3-7. Non release subworkflow

Table 3-6. Non release subworkflow steps

Step Name	User Security	Description
Approve Deployment to TEST	Change Manager	Coordinate change implementation to test environment. *SOX requirement: The development team that worked on this package cannot perform this migration.*
Quality Process Mode	QA Manager	Determine quality process mode; can be either automatic through Mercury Quality Center or manual.
Run Tests	Independent Tester	If manual mode is chosen in the “Quality Process Mode” step, changes need to be manually tested based on test plans.
Quality Center Test Execution	Independent Tester	If Mercury Quality Center mode is chosen, once QA signals through Mercury Quality Center that Test execution is complete, this step moves the workflow ahead.
Evaluate Quality	QA Manager	Approve/reject the quality of the change deployed to the test environment.
Impact & Resource Assessment Sub WF	N/A	Determine impact on dependent infrastructure components and estimate resources’ time and cost. See *Impact and Resource Assessment Subworkflow* for details.

Table 3-6. Non release subworkflow steps [continued]

Step Name	User Security	Description
Rework Change	Applications Development Manager	If quality of change deployed to test environment is rejected, change must be fixed.
Approve Deployment to LIVE	Change Manager	Coordinate change implementation to production environment. *SOX (PO11-8) Notification is sent to users alerting that change has been deployed.* *SOX requirement: The testing team must be different than the deployment team.*
Create Production Sanity TestSet in Quality Center	QA Manager	Create Production Sanity Test Set in Mercury Quality Center.
Running Sanity Tests in Quality Center	Independent Tester	Run Sanity Tests in Mercury Quality Center.

Using the Request for Change Workflow

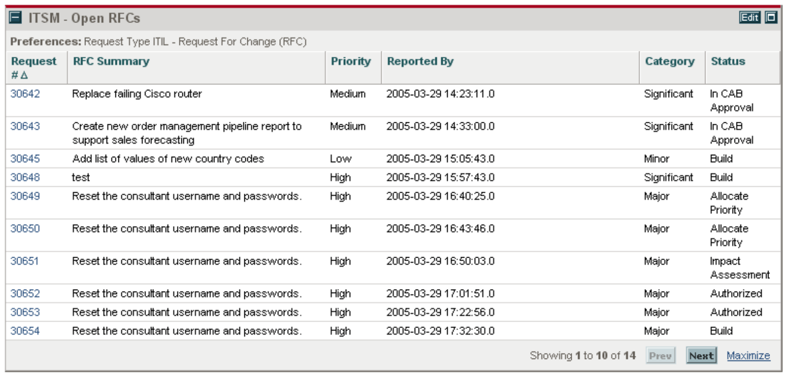
The Request For Change entity is automatically set to use the Request For Change workflow upon creation.

Change Management Portlets

The Mercury IT Service Management Accelerator includes several portlets that can be added to your Dashboard to provide real-time views into several key performance indicators (KPIs). The Accelerator also includes portlets for visibility into Sarbanes-Oxley (SOX) readiness.

ITSM - Open RFCs

This portlet is provided to users with the role of Change Manager. It lists RFCs that are currently being worked on. *Figure 3-8* shows the ITSM - Open RFCs portlet. *Table 3-7* describes the ITSM - Open RFCs portlet's filter fields.


ITSM - Open RFCs

Preferences: Request Type ITIL - Request For Change (RFC)

Request #	RFC Summary	Priority	Reported By	Category	Status
30642	Replace failing Cisco router	Medium	2005-03-29 14:23:11.0	Significant	In CAB Approval
30643	Create new order management pipeline report to support sales forecasting	Medium	2005-03-29 14:33:00.0	Significant	In CAB Approval
30645	Add list of values of new country codes	Low	2005-03-29 15:05:43.0	Minor	Build
30648	test	High	2005-03-29 15:57:43.0	Significant	Build
30649	Reset the consultant username and passwords.	High	2005-03-29 16:40:25.0	Major	Allocate Priority
30650	Reset the consultant username and passwords.	High	2005-03-29 16:43:46.0	Major	Allocate Priority
30651	Reset the consultant username and passwords.	High	2005-03-29 16:50:03.0	Major	Impact Assessment
30652	Reset the consultant username and passwords.	High	2005-03-29 17:01:51.0	Major	Authorized
30653	Reset the consultant username and passwords.	High	2005-03-29 17:22:56.0	Major	Authorized
30654	Reset the consultant username and passwords.	High	2005-03-29 17:32:30.0	Major	Build

Showing 1 to 10 of 14 Prev Next Maximize

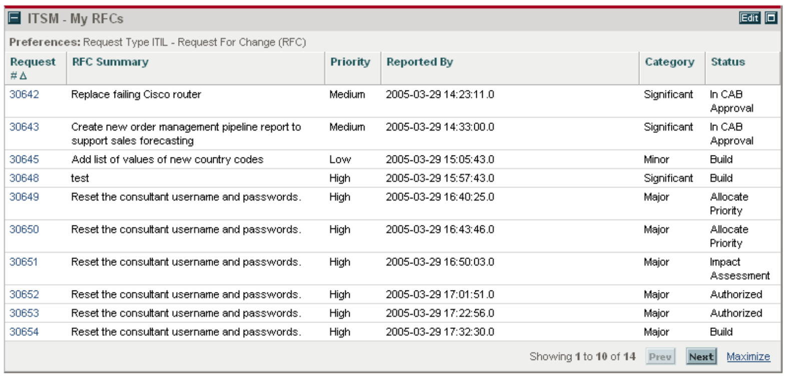
Figure 3-8. ITSM - Open RFCs portlet

Table 3-7. ITSM - Open RFCs portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Assigned To	The user the RFC is assigned to.
Category	The category of the RFC.

ITSM - My RFCs

This portlet is provided to users with the role of Change Builder, Tester, and Development. It lists RFCs that have been assigned to a specific person, usually the logged-on user. *Figure 3-9* shows the ITSM - My RFCs portlet. *Table 3-8* describes the ITSM - My RFCs portlet's filter fields.



ITSM - My RFCs
Edit
Preferences: Request Type ITIL - Request For Change (RFC)

Request #	RFC Summary	Priority	Reported By	Category	Status
30642	Replace failing Cisco router	Medium	2005-03-29 14:23:11.0	Significant	In CAB Approval
30643	Create new order management pipeline report to support sales forecasting	Medium	2005-03-29 14:33:00.0	Significant	In CAB Approval
30645	Add list of values of new country codes	Low	2005-03-29 15:05:43.0	Minor	Build
30648	test	High	2005-03-29 15:57:43.0	Significant	Build
30649	Reset the consultant username and passwords.	High	2005-03-29 16:40:25.0	Major	Allocate Priority
30650	Reset the consultant username and passwords.	High	2005-03-29 16:43:46.0	Major	Allocate Priority
30651	Reset the consultant username and passwords.	High	2005-03-29 16:50:03.0	Major	Impact Assessment
30652	Reset the consultant username and passwords.	High	2005-03-29 17:01:51.0	Major	Authorized
30653	Reset the consultant username and passwords.	High	2005-03-29 17:22:56.0	Major	Authorized
30654	Reset the consultant username and passwords.	High	2005-03-29 17:32:30.0	Major	Build

Showing 1 to 10 of 14 Prev Next Maximize

Figure 3-9. ITSM - My RFCs portlet

Table 3-8. ITSM - My RFCs portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Assigned To	The user the RFC is assigned to.
Category	The category of the RFC.

ITSM - RFCs by Category

This portlet is provided to users with the role of Change Manager. It displays a pie chart representing the percentage of RFCs in each category. *Figure 3-10* shows the ITSM - RFCs by Category portlet.

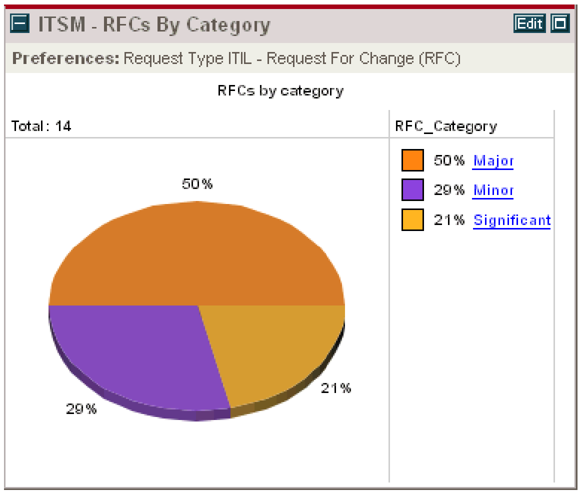


Figure 3-10. ITSM - RFCs by Category portlet

Note

The ITSM - RFCs by Category portlet's filter field, Request Type, is preset to **ITSM - Request For Change** and should not be altered.

ITSM - RFCs by Status

This portlet is provided to users with the role of Change Manager. It displays a pie chart representing the breakdown of RFCs by status. *Figure 3-11* shows the ITSM - RFCs by Status portlet.

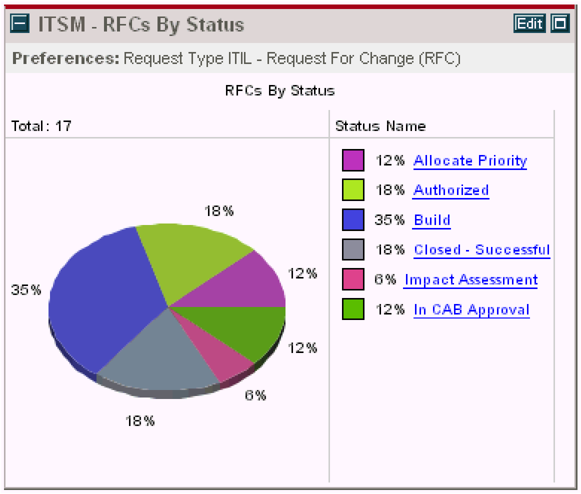


Figure 3-11. ITSM - RFCs by Status portlet

ITSM - RFCs by Priority

This portlet is provided to users with the role of Change Manager. It displays a pie chart representing the breakdown of RFCs by priority. *Figure 3-12* shows the ITSM - RFCs by Priority portlet.

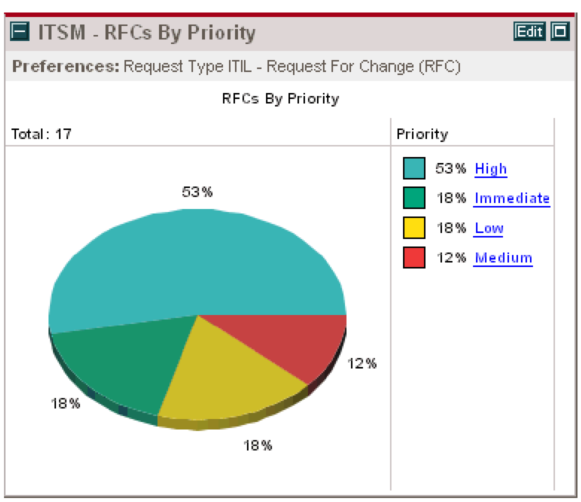


Figure 3-12. ITSM - RFCs by Priority portlet

> **Note** The ITSM - RFCs by Priority portlet's filter field, Request Type, is preset to **ITSM - Request For Change** and should not be altered.

ITSM - RFCs by Reason for Change

This portlet is provided to users with the role of Change Manager. It displays a pie chart of RFCs sorted by the type of change being considered. *Figure 3-13* shows the ITSM - RFCs by Reason for Change portlet. *Table 3-9* describes the ITSM - RFCs by Reason for Change portlet's filter fields.

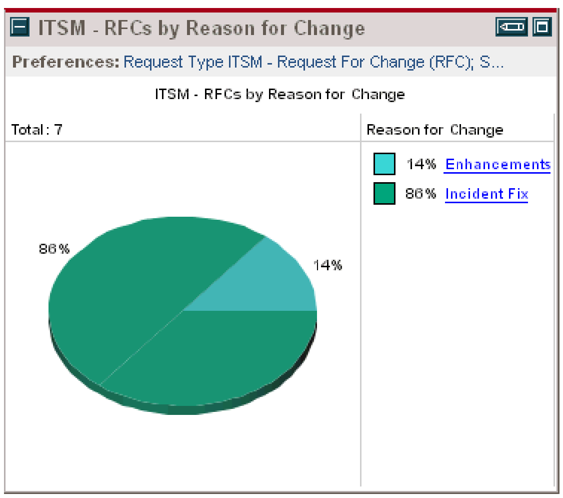


Figure 3-13. ITSM - RFCs by Reason for Change portlet

Table 3-9. ITSM - RFCs by Reason for Change portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Status	The status of the RFC.

ITSM - RFC Cost by Reason for Change

This portlet is provided to users with the role of Change Manager. It displays a bar chart representing a breakdown of resources invested in RFCs, grouped by the type of change. *Figure 3-14* shows the ITSM - RFC Cost by Reason for Change portlet. *Table 3-10* describes the ITSM - RFC Cost by Reason for Change portlet's filter fields.

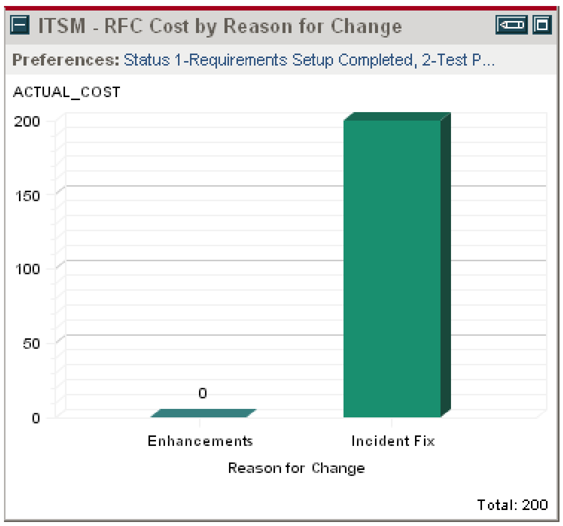


Figure 3-14. ITSM - RFC Cost by Reason for Change portlet

Table 3-10. ITSM - RFC Cost by Reason for Change portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Status	The status of the RFC.

ITSM - CAB - Application Status in Production Portlet

This portlet is available with the Mercury Business Availability Center integration for the Accelerator. See *ITSM - CAB - Application Status in Production* on page 68 for more detailed information.

SOX - High Risk (Non Emergency) RFCs by Status

This portlet is provided to users with the role of System Owner. It displays a pie chart of all RFCs that have significant business risk associated with them, broken down by status. *Figure 3-15* shows the SOX - High Risk (Non Emergency) RFCs by Status portlet. *Table 3-11* describes the SOX - High Risk (Non Emergency) RFCs by Status portlet's filter fields.

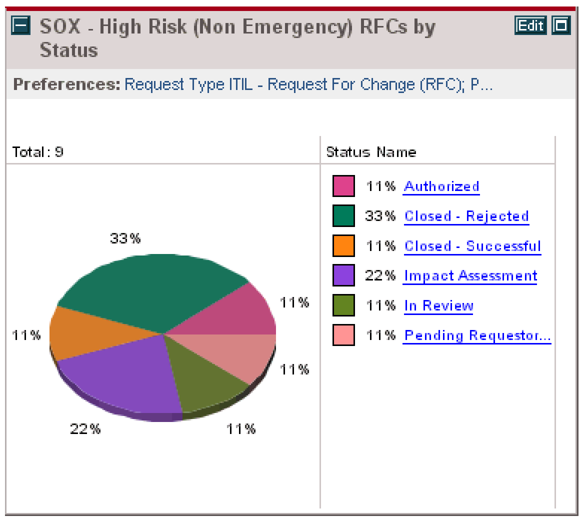


Figure 3-15. SOX - High Risk (Non Emergency) RFCs by Status portlet

Table 3-11. SOX - High Risk (Non Emergency) RFCs by Status portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Status	The status of the RFC.
SOX Risk	The SOX risk rating of the RFC.
Category	The category of the RFC.

SOX - Emergency RFCs by Status

This portlet is provided to users with the role of System Owner. It displays a pie chart of all urgent RFCs that are still not closed, broken down by status. *Figure 3-16* shows the SOX - Emergency RFCs by Status portlet. *Table 3-12* describes the SOX - Emergency RFCs by Status portlet's filter fields.

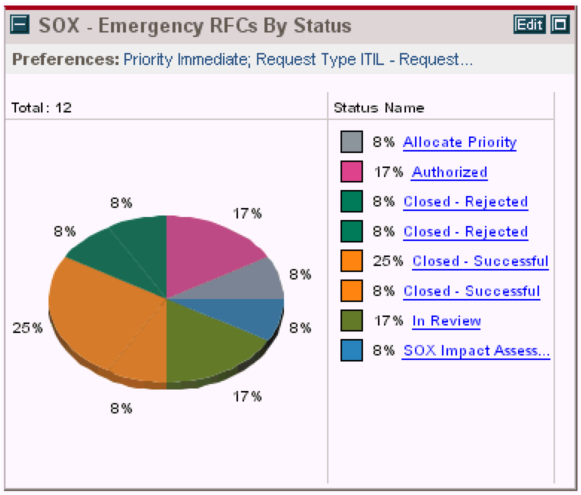


Figure 3-16. SOX - Emergency RFCs by Status portlet

Table 3-12. SOX - Emergency RFCs by Status portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Status	The status of the RFC.
SOX Risk	The SOX risk rating of the RFC.
Category	The category of the RFC.

SOX - Completed RFCs by Risk

This portlet is provided to users with the role of System Owner. It displays a bar chart of all RFCs closed with the status **Complete** in the selected past period, broken down by priority. *Figure 3-17* shows the SOX - Completed RFCs by Risk portlet. *Table 3-13* describes the SOX - Completed RFCs by Risk portlet's filter fields.

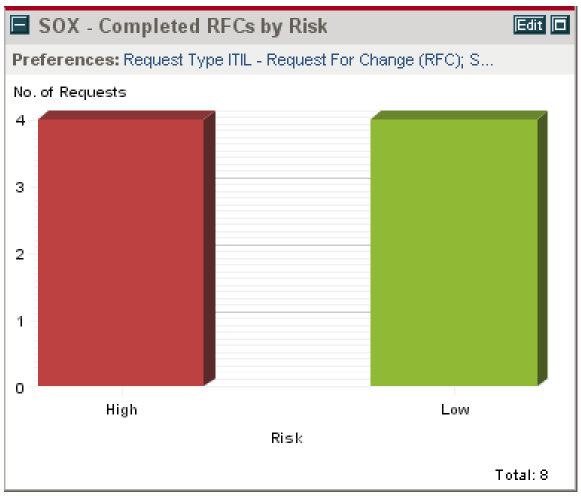


Figure 3-17. SOX - Completed RFCs by Risk portlet

Table 3-13. SOX - Completed RFCs by Risk portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Status	Preset to **Closed - Successful** (should not be altered).
From Date	The date from which to start displaying completed RFCs.
To Date	The date from which to stop displaying completed RFCs.

SOX - Rejected RFCs by Priority

This portlet is provided to users with the role of Change Manager. It displays a bar chart of all RFCs closed due to rejection in the selected past period, broken down by priority. *Figure 3-18* shows the SOX - Rejected RFCs by Priority portlet. *Table 3-14* describes the SOX - Rejected RFCs by Priority portlet's filter fields.

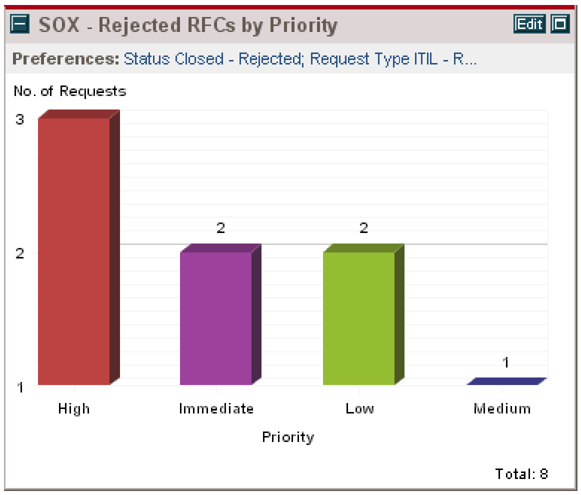


Figure 3-18. SOX - Rejected RFCs by Priority portlet

Table 3-14. SOX - Rejected RFCs by Priority portlet filter fields

Field Name	Description
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Status	Preset to **Closed - Rejected** (should not be altered).
From Date	The date from which to start displaying completed RFCs.
To Date	The date from which to stop displaying completed RFCs.

Using Change Management Portlets

To add Mercury IT Service Management Accelerator portlets to your Dashboard:

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

   The selected Dashboard page is displayed in the Personalize Dashboard page.
4. On the Personalize Dashboard page, click **Add Portlets.**

   The Add Portlets to Dashboard Page opens.
5. Search for the portlets to add.
   - To list all of the portlets, click **Find Portlets.** The Select Portlets to Add section is added to Add Portlets to Dashboard Page. The Select Portlets to Add section lists all of the portlets.
   - To list specific portlets:

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

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

   c. Click **Find Portlets.**

   The Select Portlets to Add section is added to Add Portlets to Dashboard Page. The Select Portlets to Add section lists all of the portlets matching the search criteria.
6. In the Select Portlets to Add section, select one or more portlets and click **Add.**

   The selected portlets are added to the Dashboard page.
7. On the Personalize Dashboard page, click **Done.**

   The changes to the Dashboard are saved.

Change Manager Dashboard Page

The Mercury IT Service Management Accelerator includes a pre-configured Dashboard page for the role of Change Manager that includes the following portlets:

- ITSM - Open RFCs
- ITSM - My RFCs
- ITSM - RFCs by Status
- ITSM - RFCs by Category
- ITSM - RFCs by Priority
- ITSM - RFCs by Reason for Change
- ITSM - RFC Cost by Reason for Change
- ITSM - CAB - Application Status in Production

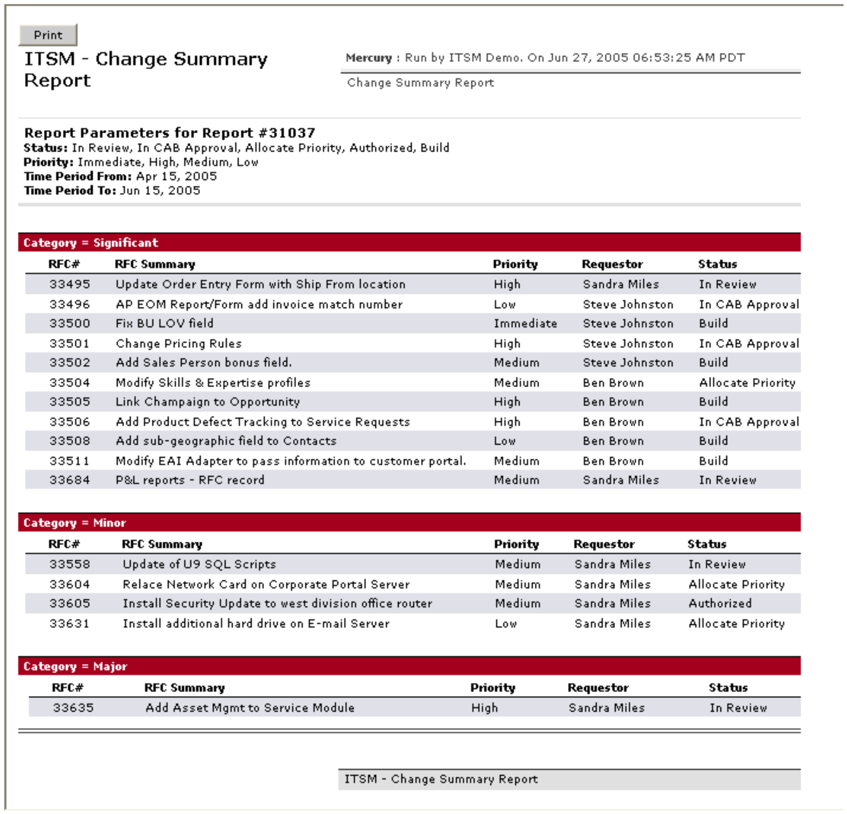
Users with the role of Change Manager can add this page to their Dashboards by clicking **Add Pre-configured Pages** on the Personalize Dashboard page and selecting **ITSM - Change Manager.**

Change Management Reports

The Mercury IT Service Management Accelerator includes several reports that can be run to provide summary data and scheduling information on RFCs in the system, as well as process participant data for SOX auditing.

Change Summary Report

The Change Summary report provides a list of RFCs that have been implemented, grouped by change Category. *Figure 3-19* shows sample output for the Change Summary report. *Table 3-15* describes the Change Summary report's filter fields.



Print

ITSM - Change Summary Report

Mercury : Run by ITSM Demo. On Jun 27, 2005 06:53:25 AM PDT

Change Summary Report

Report Parameters for Report #31037
Status: In Review, In CAB Approval, Allocate Priority, Authorized, Build
Priority: Immediate, High, Medium, Low
Time Period From: Apr 15, 2005
Time Period To: Jun 15, 2005

Category = Significant

RFC#	RFC Summary	Priority	Requestor	Status
33495	Update Order Entry Form with Ship From location	High	Sandra Miles	In Review
33496	AP EOM Report/Form add invoice match number	Low	Steve Johnston	In CAB Approval
33500	Fix BU LOV field	Immediate	Steve Johnston	Build
33501	Change Pricing Rules	High	Steve Johnston	In CAB Approval
33502	Add Sales Person bonus field.	Medium	Steve Johnston	Build
33504	Modify Skills & Expertise profiles	Medium	Ben Brown	Allocate Priority
33505	Link Champaign to Opportunity	High	Ben Brown	Build
33506	Add Product Defect Tracking to Service Requests	High	Ben Brown	In CAB Approval
33508	Add sub-geographic field to Contacts	Low	Ben Brown	Build
33511	Modify EAI Adapter to pass information to customer portal.	Medium	Ben Brown	Build
33684	P&L reports - RFC record	Medium	Sandra Miles	In Review

Category = Minor

RFC#	RFC Summary	Priority	Requestor	Status
33558	Update of U9 SQL Scripts	Medium	Sandra Miles	In Review
33604	Relace Network Card on Corporate Portal Server	Medium	Sandra Miles	Allocate Priority
33605	Install Security Update to west division office router	Medium	Sandra Miles	Authorized
33631	Install additional hard drive on E-mail Server	Low	Sandra Miles	Allocate Priority

Category = Major

RFC#	RFC Summary	Priority	Requestor	Status
33635	Add Asset Mgmt to Service Module	High	Sandra Miles	In Review

ITSM - Change Summary Report

Figure 3-19. Change Summary report output

Table 3-15. Change Summary report filter fields

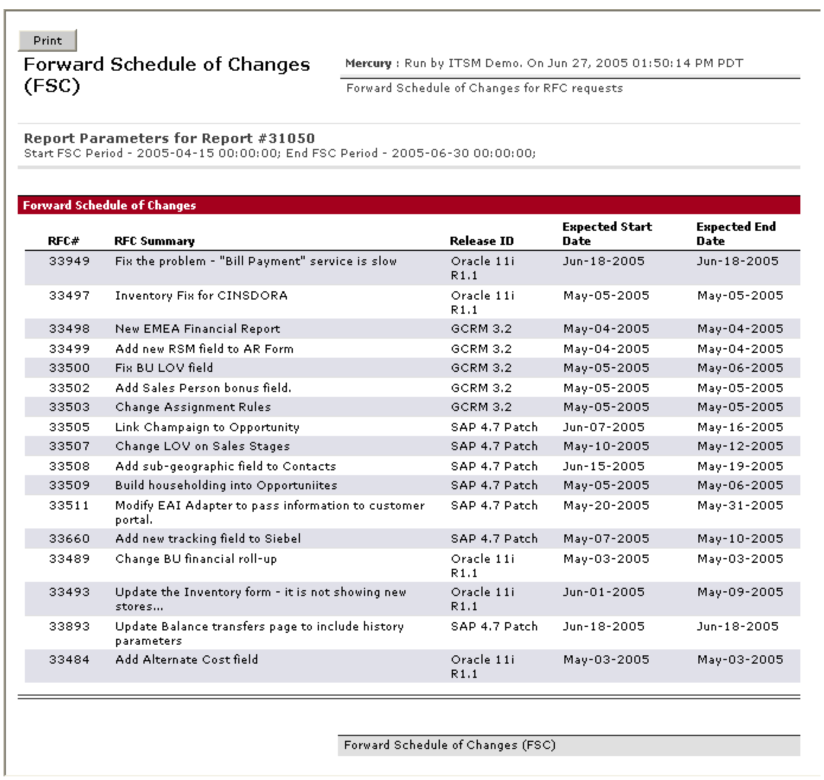
Field Name	Description
Report Title	The title of the report.
Request Numbers	Allows you to enter the request numbers of specific RFCs.
Include Closed Requests	Specify whether you want to include closed RFCs.
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Status	Searches for RFCs with the specified statuses.
Priority	Searches for RFCs with the specified priorities.
Created By	Searches for RFCs created by the specified users.
Assigned To	Searches for RFCs assigned to the specified users.
Creation Date From	Searches for RFCs created after the specified date.

Table 3-15. Change Summary report filter fields [continued]

Field Name	Description
Creation Date To	Searches for RFCs created before the specified date.
Last Update From	Searches for RFCs modified after the specified date.
Last Update To	Searches for RFCs modified before the specified date.
Show Details	Specify whether you want to show the details of each RFC.
Show Summary	Specify whether you want to show the summary of each RFC.
Columns to Display	Specify the columns you want to display in the report.

Forward Schedule of Changes (FSC) Report

The Forward Schedule of Changes (FSC) is a key report used in the change management process. The output of this report is a list of all RFCs that are scheduled to be implemented. *Figure 3-20* shows sample output for the Forward Schedule of Changes (FSC) report.



Print

Forward Schedule of Changes (FSC)

Mercury : Run by ITSM Demo. On Jun 27, 2005 01:50:14 PM PDT

Forward Schedule of Changes for RFC requests

Report Parameters for Report #31050
Start FSC Period - 2005-04-15 00:00:00; End FSC Period - 2005-06-30 00:00:00;

Forward Schedule of Changes

RFC#	RFC Summary	Release ID	Expected Start Date	Expected End Date
33949	Fix the problem - "Bill Payment" service is slow	Oracle 11i R1.1	Jun-18-2005	Jun-18-2005
33497	Inventory Fix for CINSDORA	Oracle 11i R1.1	May-05-2005	May-05-2005
33498	New EMEA Financial Report	GCRM 3.2	May-04-2005	May-04-2005
33499	Add new RSM field to AR Form	GCRM 3.2	May-04-2005	May-04-2005
33500	Fix BU LOV field	GCRM 3.2	May-05-2005	May-06-2005
33502	Add Sales Person bonus field.	GCRM 3.2	May-05-2005	May-05-2005
33503	Change Assignment Rules	GCRM 3.2	May-05-2005	May-05-2005
33505	Link Champaign to Opportunity	SAP 4.7 Patch	Jun-07-2005	May-16-2005
33507	Change LOV on Sales Stages	SAP 4.7 Patch	May-10-2005	May-12-2005
33508	Add sub-geographic field to Contacts	SAP 4.7 Patch	Jun-15-2005	May-19-2005
33509	Build householding into Opportuniites	SAP 4.7 Patch	May-05-2005	May-06-2005
33511	Modify EAI Adapter to pass information to customer portal.	SAP 4.7 Patch	May-20-2005	May-31-2005
33660	Add new tracking field to Siebel	SAP 4.7 Patch	May-07-2005	May-10-2005
33489	Change BU financial roll-up	Oracle 11i R1.1	May-03-2005	May-03-2005
33493	Update the Inventory form - it is not showing new stores...	Oracle 11i R1.1	Jun-01-2005	May-09-2005
33893	Update Balance transfers page to include history parameters	SAP 4.7 Patch	Jun-18-2005	Jun-18-2005
33484	Add Alternate Cost field	Oracle 11i R1.1	May-03-2005	May-03-2005

Forward Schedule of Changes (FSC)

Figure 3-20. Forward Schedule of Changes (FSC) report output

Table 3-16. Forward Schedule of Changes (FSC) report filter fields

Field Name	Description
Report Title	The title of the report.
Request Type	Preset to **ITSM - Request For Change (RFC)** (should not be altered).
Include Closed Requests	Specify whether you want to include closed RFCs.
Status	Searches for RFCs with the specified statuses.
Priority	Searches for RFCs with the specified priorities.
Created By	Searches for RFCs created by the specified users.
Assigned To	Searches for RFCs assigned to the specified users.
Creation Date From	Searches for RFCs created after the specified date.
Creation Date To	Searches for RFCs created before the specified date.
Last Update From	Searches for RFCs modified after the specified date.
Last Update To	Searches for RFCs modified before the specified date.
Field Prompt 1-4	These fields allow you to choose your own field prompts and values within the RFC to filter by.

Using Change Management Reports

To use Mercury IT Service Management Accelerator reports:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Reports > Submit New Report.**

   The Submit New Report page appears.

3. Select a report.

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

   - In the Recently Submitted Reports section, select a report. The report's submission page appears.
   - In the Report Category field, select **Demand Management.** The Submit New Report page is refreshed with the available reports. Select a report. The report's submission page appears.

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

   The Report Submitted page appears prior to the report.

Optional Integrations for Change Management

The Mercury IT Service Management Accelerator enables integration with other Mercury products for enhanced Change Management capabilities.

Mercury Quality Center

The Mercury IT Service Management Accelerator integrates with Mercury Quality Center to provide the following benefits:

- Integration and enforcement of quality testing into the change process.
- Management and tracking of test requirements, plans, and results.
- Data sharing between Mercury IT Governance Center and Mercury Quality Center.
- Automatic creation in Mercury Quality Center of sanity tests for the production environment when a change is deployed in Mercury IT Governance Center.
- Automatic activation of Mercury Quality Center processes in Mercury IT Governance Center: Creating a request in Mercury IT Governance Center can create a requirement in Mercury Quality Center.

Table 3-17 describes the fields that appear on the Request For Change related to the Mercury Quality Center integration.

Table 3-17. RFC fields for Mercury Quality Center integration

Field Name	Field Description
Quality Center Instance	The Quality Center instance that will receive the new Mercury IT Governance Center request.
Quality Center Domain	The Quality Center domain of the working project.
Quality Center Project	The Quality Center project that linked with this request.
Assigned to Quality Center User	The Quality Center requirement assigned to user.
Quality Center Requirement No	The Quality Center requirement number.
Quality Center Status:	The Quality Center requirement status.
Quality Center Attachments	The requirement attachment URL.
Quality Center Message	Stores any requirement integration messages.

For more detailed information on installing and using the Mercury Quality Center integration, see the *Mercury IT Governance Center–Quality Center Integration Guide.*

Mercury Application Mapping

The Mercury IT Service Management Accelerator integrates with Mercury Application Mapping to provide the following benefits:

- Running Impact Analysis in Mercury Application Mapping Server.
- Assessment of business impact of the planned change.
- Comparison of snapshots to verify change deployments.

Table 3-18 describes the fields that appear on the Request For Change related to the Mercury Application Mapping integration.

Table 3-18. RFC fields for Mercury Application Mapping integration

Field Name	Description
Configuration Items Selection	The number of configuration items selected.
Last Impact Score	The Impact Score from the last impact analysis run.
Impact Analysis Results	The Impact Analysis Reports generated in MAM. The Impact Analysis report shows the impacted objects and the severity of each object.
Compare	To compare two reports, select the reports that you want to compare and click **Compare.**

Note

Visibility of integration fields is dependent on the workflow status of the RFC.

For more detailed information on installing and using the Mercury Application Mapping integration, see the *Mercury IT Governance Center–Mercury Application Mapping Integration Guide.*

Note

The fields for the RFC described here appear on the RFC during its lifecycle regardless of whether the Accelerator has been integrated with Mercury Application Mapping. These fields can be removed from the RFC's request header type if you do not want to make use of them. See the *Mercury Demand Management: Configuring a Request Resolution System* guide for more details on request header types.

Mercury Change Control Management

The Mercury IT Service Management Accelerator integrates with Mercury Change Control Management to provide the following benefits:

- Assessment of business impact of planned changes.
- Visibility over the Change Deployment process.

Integration of the Accelerator with Mercury Change Control Management requires installation of the following:

- Mercury IT Governance Center release 6.0 Service Pack 10 (or later)
- Mercury Change Control Management version 1.1 (or later)

During the impact analysis phase of the Request For Change lifecycle, the **Launch Mercury Change Control Management** button appears on the RFC. Once launched, Mercury Change Control Management provides additional impact analysis that helps users assess and approve changes.

For more detailed information on using Mercury Change Control Management, see the *Mercury Change Control Management User's Guide.*

Mercury Business Availability Center

The Mercury IT Service Management Accelerator integrates with Mercury Business Availability Center to provide the following benefits:

- Side-by-side KPI comparison. The side-by-side view displays pre-change and post-change SLA information from Mercury Business Availability Center side-by-side, for the application(s) that were affected by the change.
- In the event of problems in the production environment (determined by Mercury Business Availability Center and displayed in the Dashboard by the ITSM - CAB - Application Status in Production portlet), the user is able to review recent changes (using Mercury Change Control Management) and attempt to determine the root of the problem, with the capability of drilling down into the RFC in Mercury IT Governance Center.

Integration of the Accelerator with Mercury Business Availability Center requires installation of the following:

- Mercury IT Governance Center release 6.0 Service Pack 10 (or later)
- Mercury Business Availability Center version 6.1 Service Pack 1 (or later)
- Business Availability Center Application Change Lifecycle 2.0 patch

The integration enables use of a new Application field on the RFC that retrieves a list of Mercury Business Availability Center CIs of type "Application" from the Mercury Business Availability Center CMDB.

Configuring Mercury Business Availability Center Integration

After installation, the integration between the Accelerator and Mercury Business Availability Center requires some configuration before use.

- The Business Availability Center Application Change Lifecycle 2.0 patch must be installed. For more detailed information about the Business Availability Center Application Change Lifecycle 2.0 patch, consult your Professional Services representative.
- SLAs must be set up in Mercury Business Availability Center in order to allow the *ITSM - Deployed Releases* portlet to function properly. For more detailed information, see the “Service Level Administration” section in the *Application Administration* guide for Mercury Business Availability Center.
- Several parameters in the `server.conf` file in the root directory on the Mercury IT Governance Server must be assigned values. *Table 3-19* describes these parameters.

Table 3-19. Parameters in server.conf for Mercury Business Availability Center integration

Parameter	Description
BAC_URL	The URL of the Mercury Business Availability Center server.
BAC_USER	The user name for Mercury Business Availability Center that the integration will use.
BAC_PASSWORD	The password for the integration’s Mercury Business Availability Center user account, encrypted using `kEncrypt.sh`.
CMDB_WS_URL	The URL of the Web server for the Mercury Business Availability Center CMDB.

ITSM - CAB - Application Status in Production

This portlet is provided to users with the role of Change Advisory Board. It displays a list of applications in production that are being changed, and contains links to the KPIs Over Time report in Mercury Business Availability Center, which displays the status of an application in your organization’s production environment. *Figure 3-21* shows the ITSM - CAB - Application Status in Production portlet.

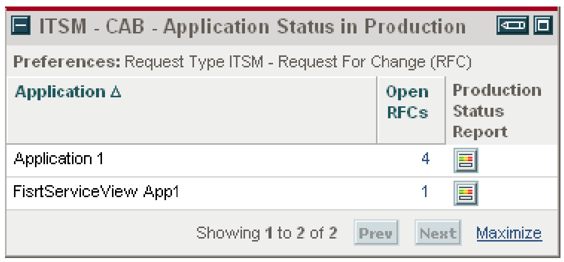


Figure 3-21. ITSM - CAB - Application Status in Production portlet

Third-Party Help Desk Systems

The Mercury IT Service Management Accelerator integrates with the following third-party help desk systems:

- Remedy Action Request System™ 5.0
- Peregrine Service Center™ 6.1 (includes Peregrine Web Services)

This integration delivers the following benefits:

- Application change requests are gathered from all over IT into one place. This includes incident, problems and change records (tickets) from help desk systems.
- Mercury IT Governance Center becomes a single, comprehensive repository of application change requests.

Table 3-20 describes the fields that appear on the Request For Change related to third-party help desk integration.

Table 3-20. RFC fields for third-party help desk integration

Field Name	Description
System Name	The name of the help desk system.
Ticket Id	The ticket's ID in the help desk system.
Ticket Creation Date	The ticket's creation date in the help desk system.
Ticket Last Update	The ticket's last update date in the help desk system.
Ticket Priority	The ticket's priority in the help desk system.
Ticket Info	The ticket's info from the help desk system.

Integration of the Accelerator with a third-party help desk system requires configuration of the adapter file for Peregrine or Remedy. See the following guides for more detailed information:

- *Mercury Service Desk Adapter for Peregrine Configuration Guide*
- *Mercury Service Desk Adapter for Remedy Configuration Guide*

Note

The fields for the RFC described here appear on the RFC during its lifecycle regardless of whether the Accelerator has been integrated with a third-party help desk system. These fields can be removed from the RFC request type if you do not want to make use of them. See the *Mercury Demand Management: Configuring a Request Resolution System* guide for more details on modifying request types.

Extensions for Mercury Change Management

The Accelerator features a variant RFC for Enterprise Applications and a set of associated workflows that can be used to track and solve any issue in an Oracle E-Business Suite or SAP Solutions implementation environment. This process follows ITIL guidelines and is closely related to the various processes that are available within the suite of Mercury Change Management Extensions. This new RFC and its associated workflows provide a central funnel for all your Oracle E-Business Suite and SAP Solutions application issues.

The RFC for Enterprise Applications features the same fields as the standard RFC, with additional sets of fields specific to Oracle E-Business Suite or SAP Solutions. *Table 3-21* describes these new fields.

Table 3-21. Oracle and SAP fields on RFC for Enterprise Applications

Field Name	Description
Oracle Application Details	
Oracle Environment	The Oracle Apps Environment for which the change needs to be applied.
Desktop OS	The desktop operating system being used.
Application	The Application Short Name for which the change needs to be applied.
JInitiator Version	The version of JInitiator being used.
Apps Responsibility	The Apps Responsibility Name being used.
Browser Version	The browser name and version being used.
Apps Form	The Apps Form Name being used.
DB Version	The database version being used.
Apps Username	The Apps Username being used.
Oracle Change Type	The type of change being considered.
SAP Application Details	
Environment	The SAP Environment being used.
Release	The SAP release for which the change needs to be applied.
Module	The SAP module for which the change needs to be applied.
Component	The SAP component for which the change needs to be applied.
Change Type	The type of change being considered.

Figure 3-22 shows the RFC for Enterprise Applications workflow. *Table 3-22* lists the important steps in the RFC for Enterprise Applications workflow and the user roles associated with each.

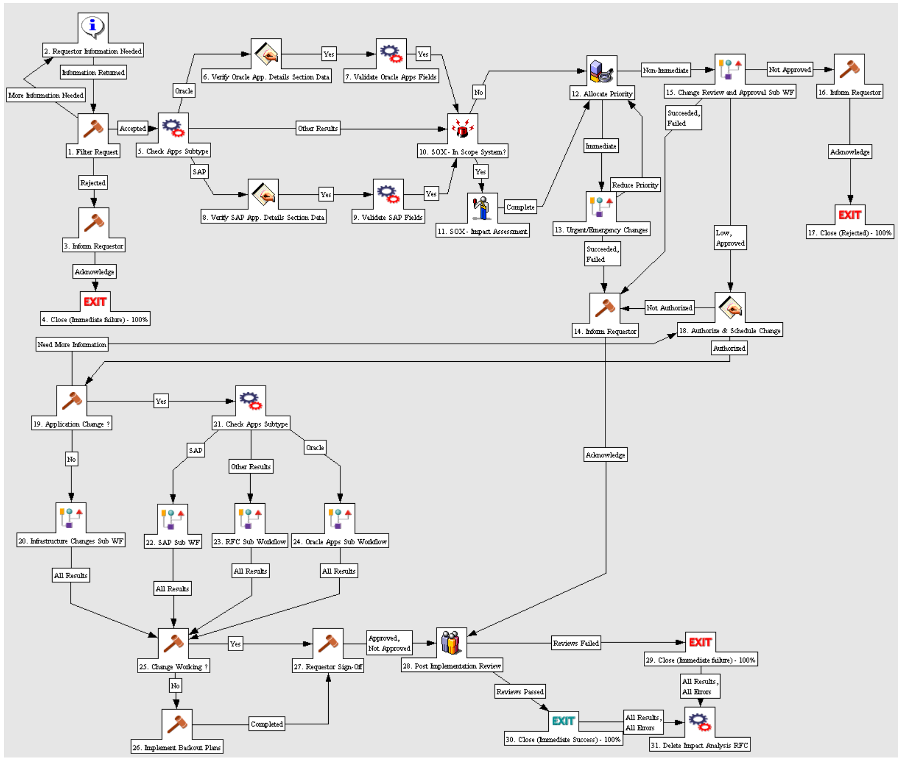


Figure 3-22. RFC for Enterprise Applications workflow

Table 3-22. RFC for Enterprise Applications workflow steps (page 1 of 3)

Step Name	User Security	Description
Filter Change Request	Oracle or SAP Change Manager	Initial review and classification of change request; determine if this RFC is acceptable based on company policy.
Requestor Information Needed	Oracle or SAP Change Manager	Require requestor to provide more information.
Inform Requestor	Oracle or SAP Change Manager	Inform requestor that request was rejected by Change Manager.
Check Apps Subtype	Fully automated step	Determines whether the RFC is for Oracle E-Business Suite or SAP Solutions.
Verify Oracle App. Details Section Data	Oracle Change Manager	Prompt user to fill in **Oracle Application Details** fields.

Table 3-22. RFC for Enterprise Applications workflow steps (page 2 of 3)

Step Name	User Security	Description
Verify SAP App. Details Section Data	SAP Change Manager	Prompt user to fill in **SAP Application Details** fields.
Validate Oracle Apps Fields	Oracle Change Manager	Verifies that mandatory **Oracle Application Details** fields are filled.
Validate SAP Fields	SAP Change Manager	Verifies that mandatory **SAP Application Details** fields are filled.
SOX - In Scope System?	*Fully automated step*	*Determine if SOX controls are in place and need to be assessed.*
SOX - Impact Assessment	*Oracle or SAP Change Manager*	*Change Manager completes SOX impact assessment.*
Allocate Priority	Oracle or SAP Change Manager	Validate RFC priority and determine if this is an urgent change request.
Urgent/ Emergency Changes	N/A	Urgent change process designed to handle emergency changes, described in *Urgent/ Emergency Change Subworkflow* on page 38.
Inform Requestor	Oracle or SAP Change Manager	Inform Requestor that the project proposal created for the modification request was rejected by the IT Executive Board or that the CAB did not approve the impact assessment.
Change Review and Approval Subworkflow	N/A	Review and approval process for the RFC, described in *Change Review and Approval Subworkflow* on page 40.
Authorize and Schedule Change	Oracle or SAP Change Manager	If Minor change, authorize and schedule change. Emergency changes aside, the only changes that do not require waiting for CAB approval are high priority and low risk.
Inform Requestor	Oracle or SAP Change Manager	Inform requestor that request was not authorized by the Change Manager.
Application Change?	Oracle or SAP Change Manager	Determine whether this is an application change.

Table 3-22. RFC for Enterprise Applications workflow steps (page 3 of 3)

Step Name	User Security	Description
Infrastructure Changes Sub WF	N/A	Determine whether infrastructure changes are necessary.
Check Apps Subtype	Fully automated step	Determines whether the RFC is for Oracle E-Business Suite or SAP Solutions.
SAP Sub Workflow	N/A	A subworkflow specific to SAP Solutions, described below in *SAP Solutions*.
RFC Sub Workflow	N/A	A generic subworkflow for non-Oracle or SAP applications.
Oracle Apps Sub Workflow	N/A	A subworkflow specific to Oracle E-Business Suite, described below in *Oracle E-Business Suite*.
Change Working?	Independent Tester	Review change was successfully implemented with no adverse impact.
Implement Backout Plans	Oracle or SAP Change Builder	If change fails to work, Implement backout plans to backout change from PRODUCTION environment.
Requestor Sign-off	Oracle or SAP Change Manager	Get sign-off from requestor of change to acknowledge that change was implemented.
Post Implementation Review	Oracle or SAP Change Manager	Review change was successfully implemented with no adverse impact
Delete Impact Analysis RFC	Fully automated step	Delete impact analysis RFC.
Exit	Fully automated step	Update status to **Closed.**

Oracle E-Business Suite

The Mercury Change Management Extension for Oracle E-Business Suite™ includes the following functionalities, which are leveraged by the ITSM - RFC Oracle Apps subworkflow:

- Requests for enhancements
- Requests for new report types
- Requests for conversion and importation of data from third-party applications into Oracle
- Deployment of changes
- Patch management

Figure 3-23 shows the RFC - Oracle Apps subworkflow. *Table 3-23* lists the important steps in the RFC - Oracle Apps subworkflow and the user roles associated with each.

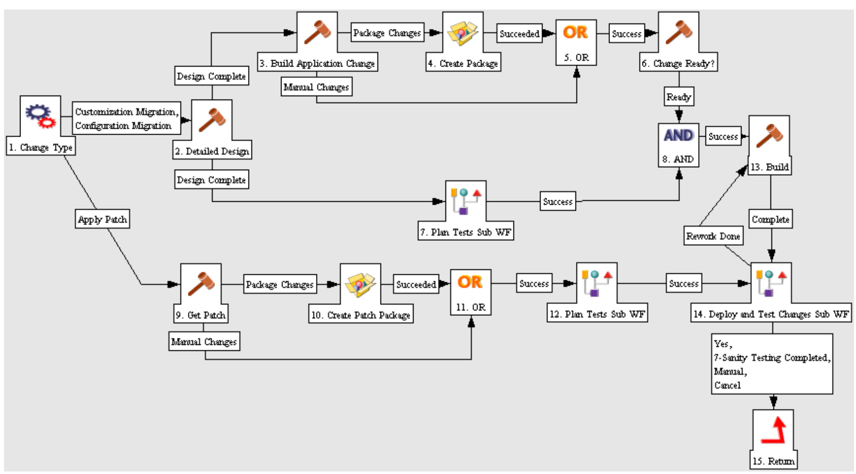


Figure 3-23. RFC - Oracle Apps subworkflow

Table 3-23. RFC - Oracle Apps subworkflow steps

Step Name	User Security	Description
Change Type	Oracle Change Manager	Determines the type of change needed.
Get Patch	Oracle Change Manager	Receives the patch from Oracle.
Create Patch Package	Oracle Change Manager	Creates a package with patch details.

Table 3-23. RFC - Oracle Apps subworkflow steps [continued]

Step Name	User Security	Description
Plan Tests Sub WF	N/A	A modular process for creating test plans. See *Plan Tests Subworkflow* on page 43 for details.
Detailed Design	Application Developer	Writes the detailed design for the internal changes.
Build Application Change	Application Developer	Build application code for change.
Create Package	Application Developer	Create change package with code changes.
Change Ready?	Oracle Change Manager	Verifies if the changes are ready to be deployed.
Build	Application Developer	Build the change.
Deploy and Test Changes SubWF	N/A	Handles manual delivery of the change.

SAP Solutions

The Mercury Change Management Extension for SAP Solutions™ includes the following functionalities, which are leveraged by the ITSM - RFC SAP subworkflow:

- R/3 migration
- Net Weaver migration
- Patch appliance

Figure 3-24 shows the RFC - SAP subworkflow. *Table 3-24* lists the important steps in the RFC - SAP subworkflow and the user roles associated with each.

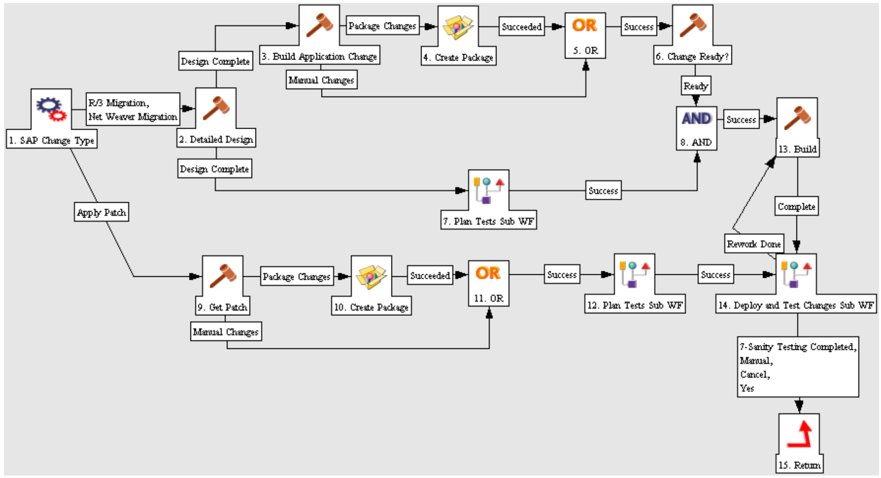


Figure 3-24. RFC - SAP subworkflow

Table 3-24. RFC - SAP subworkflow steps

Step Name	User Security	Description
SAP Change Type	SAP Change Manager	Determines the type of change needed.
Get Patch	SAP Change Manager	Receives the patch from SAP.
Create Package	SAP Change Manager	Creates a package with patch details.
Plan Tests Sub WF	N/A	A modular process for creating test plans. See *Plan Tests Subworkflow* on page 43 for details.
Detailed Design	Application Developer	Writes the detailed design for the internal changes.
Build Application Change	Application Developer	Build application code for change.
Create Package	Application Developer	Create change package with code changes.
Change Ready?	SAP Change Manager	Verifies if the changes are ready to be deployed.

Table 3-24. RFC - SAP subworkflow steps [continued]

Step Name	User Security	Description
Build	Application Developer	Build the change.
Deploy and Test Changes SubWF	N/A	Handles manual delivery of the change.

Change Manager for Enterprise Applications Dashboard Page

The Mercury IT Service Management Accelerator includes the Change Manager for Enterprise Applications Dashboard page for tracking RFCs for Enterprise Applications. This page is nearly identical to the *Change Manager Dashboard Page*, featuring nearly identical portlets that are pre-configured to be easily filtered for Oracle- or SAP-related RFCs. Each portlet features a new Enterprise Application filter field on its Edit page, pictured in *Figure 3-25*:

Figure 3-25. Enterprise Application filter field

This field can be used to easily filter portlets for a specific enterprise application.

Users with the role of Change Manager can add this page to their Dashboards by clicking **Add Pre-configured Pages** on the the Personalize Dashboard page and selecting **ITSM - Change Manager for Enterprise Applications.**

Chapter

4

ITIL Release Management

In This Chapter:

Overview of ITIL Release Management

ITIL defines a *release* as: A collection of new and/or changed components that are tested and introduced into the live environment together. The ITIL Release Management process helps to design and implement efficient procedures for the distribution and installation of changes. This process includes coordinating build and testing activities to help ensure that only the authorized and tested versions of changes are implemented in production. Ultimately, releasing a change requires:

- Developing the change
- Testing the change for functionality, quality, and performance
- Pushing the change into production

The Mercury IT Service Management Accelerator enables users to collect information for a release using a release form, which is submitted along a predefined release management process. Once initial release process steps have been completed, the release is created and RFCs being processed along the *Request for Change Workflow* can be added to the release in preparation for release deployment to the TEST and LIVE environments. The release management process then moves through testing and deployment steps toward completion. Portlets delivered with the Accelerator can be added to a user's Dashboard and used to monitor the status of releases. Additionally, reports can be run to obtain release summaries and scheduling details.

This chapter discusses the Mercury IT Governance Center entities provided for use in the ITIL Release Management process by the Mercury IT Service Management Accelerator, including:

- Release Management request type (release request form)
- Release Management workflow
- Release Management portlets
- Release Management reports
- Optional integrations for Release Management

Release Management Roles

The following roles play an active part in the ITIL Release Management process:

- Release Manager
- Test Manager
- Development Manager
- Operations Manager
- Change Manager
- CAB

Aside from being valuable divisions of responsibility, these roles are used to designate user security for the default *Release Workflow*.

Release Request Form

The ITIL Release Management process as modeled by the Mercury IT Service Management Accelerator sends a release request form along the *Release Workflow* to be examined and resolved. *Table 4-1* describes the fields contained in the release request form entity.

Table 4-1. Release request form fields (page 1 of 3)

Field Name	Description
Summary	
Release Status	The status of the release request.
Release Category	The release category, based on the scope of the release (number of changes in a release),
Release Type	The type of release.
Release Summary	The summary of the release.
Workflow	The workflow being used by the release request. Defaulted to **ITSM - Release Request Workflow** (should not be changed).
Priority	The priority of the release.
Created By	The user who created the release request.

Table 4-1. Release request form fields (page 2 of 3)

Field Name	Description
Release Planning	
Release ID	The ID for the release.
Release Definition Summary	A summary of the definition of this release.
Release Definition	Enables the user to attach the release definition document directly to the release request.
Release Policy Summary	A summary of the policy that governs this release.
Release Policy	Enables the user to attach the release policy document directly to the release request.
Release Plans Summary	A summary of rollout plans for this release.
Release Plans	Enables the user to attach the rollout plans for this release (for example: timetable of events, resource plan, who will do what and when) directly to the release request.
QA Information	
Release Test Plan Summary	A summary of the test plan for this release.
Release Test Plan	Enables the user to attach the release test plan (the plan that describes tests to be performed on this release in the TEST environment) directly to the release request.
Release Acceptance Criteria Summary	A summary of the release acceptance criteria for this release.
Release Acceptance Criteria	Enables the user to attach the release acceptance criteria document (which details criteria that qualify the acceptance of this release before deployment to the LIVE environment) directly to the release request.
Test Results	Enables the user to attach the test results directly to the release request.
Known Defects Summary	A summary of known defects that will be carried forward into the LIVE environment.
Known Defects	Enables the user to specify RFCs relating to known defects that will be carried forward into the LIVE environment.

Table 4-1. Release request form fields (page 3 of 3)

Field Name	Description
Release Preparation	
Communication Plan Summary	A summary of the communication plan for this release.
Communication Plan	Enables the user to attach the communication plan (the plan that describes the various notifications that need to be sent out prior to release deployment into the LIVE environment) directly to the release request.
Training Plan Summary	A summary of the training plan for this release.
Training Plan	Enables the user to attach the training plan (the plan that describes the training that needs to be provided prior to release deployment into the LIVE environment) directly to the release request.
Release Backout Plans Summary	A summary of the backout plans for this release.
Release Backout Plans	Enables the user to attach the backout plan (the release plan that describes procedures to backout the release to its original state) directly to the release request.
License Agreements	Enables the user to attach any license agreement documents for software licensed in this release directly to the release request.
Support Agreements	Enables the user to attach any support agreement documents for support policies of software licensed in this release directly to the release request.
Service Level Agreements	Enables the user to attach any SLAs for ordering new equipment or software directly to the release request.
Leasing Agreements	Enables the user to attach any leasing agreement documents for software leased in this release directly to the release request.
Note: The fields for the RFC described in *Mercury Quality Center* on page 63 and *Mercury Business Availability Center* on page 66 appear on the release request during the release's lifecycle regardless of whether the Accelerator has been integrated with Mercury Quality Center or Mercury Business Availability Center. These fields can be removed from the release request's request header type if you do not want to make use of them. See the *Mercury Demand Management: Configuring a Request Resolution System* guide for more details on modifying request header types.	

Using the Release Request Form

To use the release request form:

1. Log on to Mercury IT Governance Center.

   For information on how to log on to the Mercury IT Governance Center, see the *Getting Started* guide.

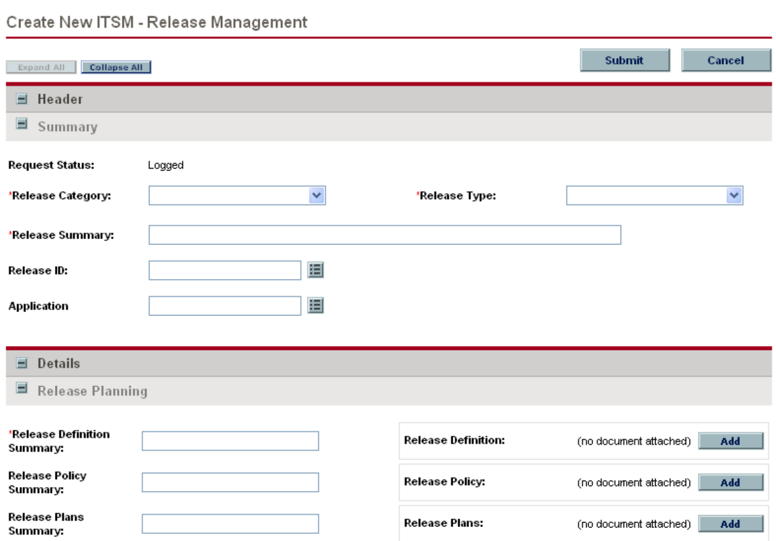
2. From the menu bar, select **Create > Request.**

   The Create From Available Request Types page appears.

3. In the Create From Available Request Types page, from the Request Type drop down list, select **ITSM - Release Management.**

4. In the Create From Available Request Types page, click **Create.**

   The Create New Request page appears, displaying the appropriate release request form fields.



5. In the Header section, complete the fields as required.

   Required fields have a red asterisk. All other fields are optional, but are often helpful when others are reviewing an open request. For information concerning a specific field, click the **Help** icon next to the field (if available).

6. In the Details section, complete the fields as required.

7. In the Notes section, enter additional information.

   The Notes section contains fields where notes and information concerning the release can be entered and stored. Typically, when creating a release request form, you do not need to add a note to it. However, add a note if you want to convey additional information to the reviewers and processors of the release request form.

8. In the References section, add references to the request.

   In some cases it might be useful to reference a Web-accessible file or attach a document or file from a local machine to the release request form. For more information on adding references, see the *Mercury Demand Management User's Guide.*

9. In the Create New Request page, click **Submit.**

   The release request form is submitted. The Request Creation Confirmed page appears.

Note

Mercury IT Governance Center can be configured to save the request before the request is submitted. To have this feature enabled for your Mercury IT Governance Center, see your application administrator.

After submitting the request, on the Request Creation Confirmed page, you can click the link (Request #) to see the newly generated release request form's detail page.

Once the release request form has been submitted, it is assigned an initial status, such as New. It is then routed along the *Release Workflow*.

Release Workflow

The release workflow is the sequence of approvals, decisions, or actions that the release form is processed along. The release form starts at the beginning of the release workflow; when it reaches the end of the workflow, its lifecycle is complete. After the release request has been through initial planning, the release is created, and multiple RFCs (with their related packages) can be aggregated into the release. The deployment steps in the release request workflow coordinate with the actual release to automate the deployment of all packages in the release into the TEST and LIVE environments.

Figure 4-1 shows the release workflow. *Table 4-2* lists the important steps in the release workflow and the user roles associated with each.

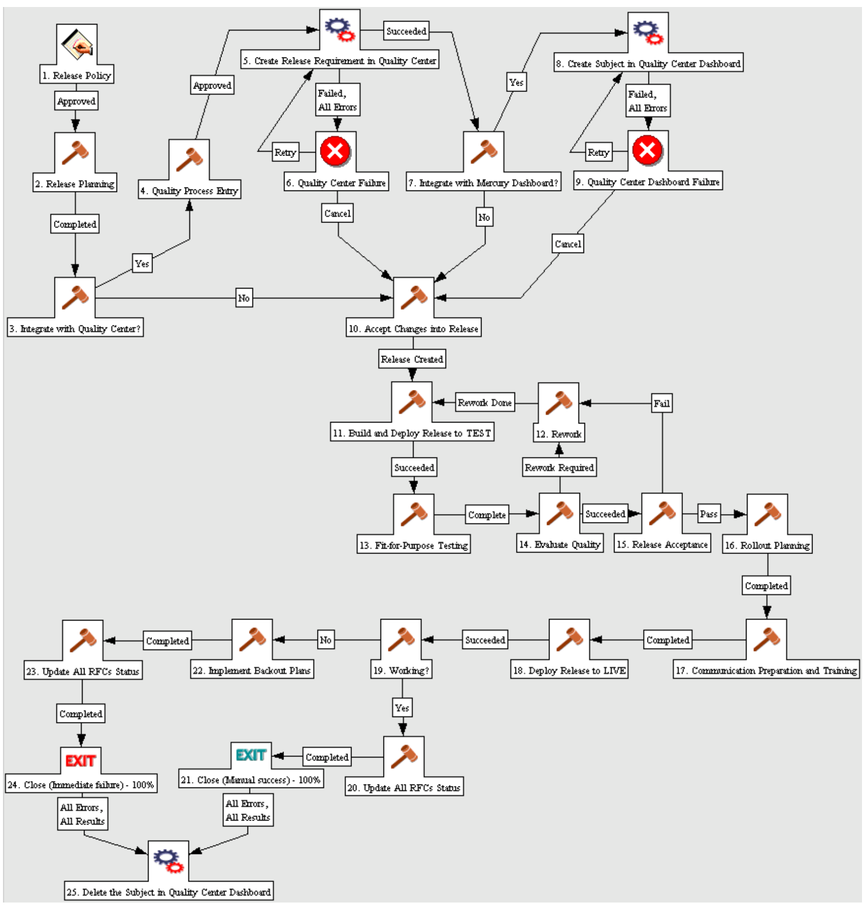


Figure 4-1. Release workflow

Table 4-2. Release workflow (page 1 of 2)

Step Name	User Security	Description
Release Policy	Release Manager	Define the release policy for this release (including release number and rules for accepting changes into the release).
Release Planning	Release Manager Development Manager QA Manager Operations Manager	Review and approval of the release policy and other planning documents (such as release acceptance criteria).
Integrate with Quality Center?	QA Manager	Verify whether user wishes to use Mercury Quality Center integration, if enabled.
Quality Process Entry	QA Manager	Secure approval for release entry into Mercury Quality Center-integrated process.
Create Release Requirement in Quality Center	QA Manager	Create a test requirement in Mercury Quality Center for the release, if integration has been enabled.
Integrate with Mercury Dashboard?	QA Manager	Check if user has installed the Mercury Dashboard integration.
Create Subject in Quality Center Dashboard	QA Manager	Create a subject in Mercury Quality Center Dashboard, if integration has been enabled.
Accept Changes into Release	Release Manager Change Manager	Add RFC-related changes to the release. This can be done from the RFC workflow directly (for changes that qualify for this release).
Build and Deploy Release to TEST	Release Manager QA Manager	Deploy the entire release into QA or staging environment and prepare for integration testing. This step automatically migrates the release and related packages to the TEST environment.
Fit-for-Purpose Testing	Release Manager	Fit-for-purpose testing of this release.
Evaluate Quality	QA Manager	Testing of this release; includes testing of backout plan.

Table 4-2. Release workflow (page 2 of 2)

Step Name	User Security	Description
Release Acceptance?	Release Manager Change Manager	Based on test results and known defects, determine if this release is acceptable for LIVE deployment.
Rollout Planning	Release Manager	Plan the rollout into LIVE environment; the key document is the release plan (who does what and when).
Communication Preparation and Training	Release Manager	Prepare for LIVE rollout; determine logistics, training, and communication.
Deploy Release to LIVE	Operations Manager Release Manager	Distribute and install this release to the LIVE environment. This step automatically migrates the release and related packages to the LIVE environment. *SOX Segregation of Duties prohibits developers and testers from being involved in deployment of code into production. It is important that users with this role not be involved in this step.*
Working?	Release Manager Operations Manager	Determine if the release is working based on sanity check and testing.
Implement Backout Plans	Release Manager Operations Manager	If the release is not working, implement the backout plan.
Update All RFCs Status	Release Manager	Update the status of RFCs related to this release.
Exit	Release Manager	Update status to Closed.
Delete the Subject in Quality Center Dashboard	QA Manager	Deletes the subject created in the Mercury Quality Center Dashboard, if one exists.

Using the Release Workflow

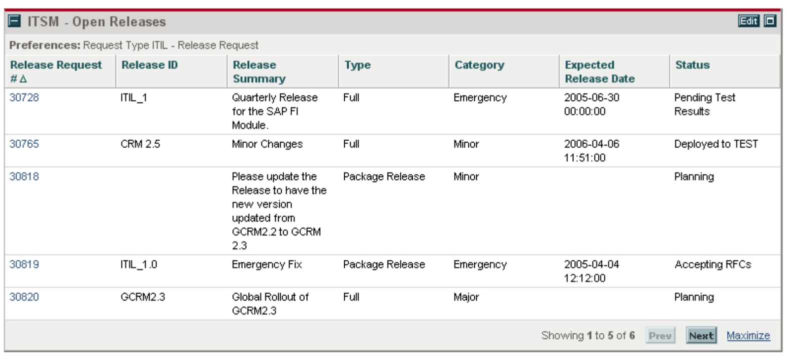
The release request form entity is automatically set to use the release workflow upon creation.

Release Management Portlets

The Mercury IT Service Management Accelerator includes several portlets that can be added to your Dashboard to provide real-time views into several key performance indicators (KPIs).

ITSM - Open Releases

This portlet is provided to users with the role of Release Manager. It lists releases that do not have the status of **Closed.** *Figure 4-2* shows the ITSM - Open Releases portlet. *Table 4-3* describes the ITSM - Open Releases portlet's filter fields.



ITSM - Open Releases

Preferences: Request Type ITIL - Release Request

Release Request #	Release ID	Release Summary	Type	Category	Expected Release Date	Status
30728	ITIL_1	Quarterly Release for the SAP FI Module.	Full	Emergency	2005-06-30 00:00:00	Pending Test Results
30765	CRM 2.5	Minor Changes	Full	Minor	2006-04-06 11:51:00	Deployed to TEST
30818		Please update the Release to have the new version updated from GCRM2.2 to GCRM 2.3	Package Release	Minor		Planning
30819	ITIL_1.0	Emergency Fix	Package Release	Emergency	2005-04-04 12:12:00	Accepting RFCs
30820	GCRM2.3	Global Rollout of GCRM2.3	Full	Major		Planning

Showing 1 to 5 of 6 Prev Next Maximize

Figure 4-2. ITSM - Open Releases portlet

Table 4-3. ITSM - Open Releases portlet filter fields

Field Name	Description
Request Type	Should be set to **ITSM - Release Request.**
Assigned To	The user assigned to the release.
Category	The category of the release.

ITSM - My Releases

This portlet is provided to users with the role of Release Manager and other roles involved in the release management process. It lists releases that have been assigned to a specific person, usually the logged-on user. *Figure 4-3* shows the ITSM - My Release Queue portlet. *Table 4-4* describes the ITSM - My Release Queue portlet's filter fields.

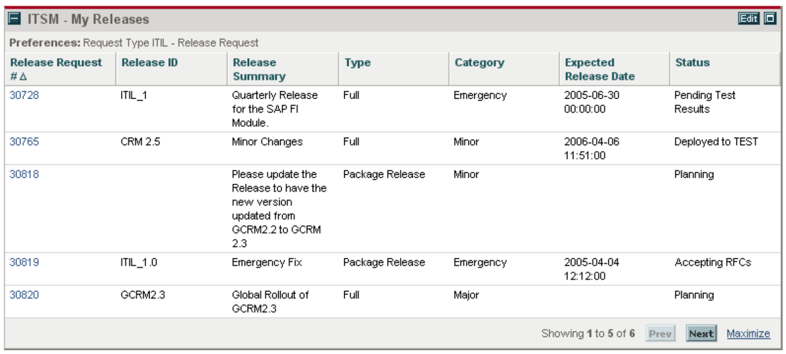


Figure 4-3. ITSM - My Release Queue portlet

Table 4-4. ITSM - My Release Queue portlet filter fields

Field Name	Description
Request Type	Should be set to **ITSM - Release Request.**
Assigned To	The user assigned to the release.
Category	The category of the release.

ITSM - Releases By Category

This portlet is provided to users with the role of Release Manager. It displays a pie chart representing the percentage of releases in each category. *Figure 4-4* shows the ITSM - Releases By Category portlet.

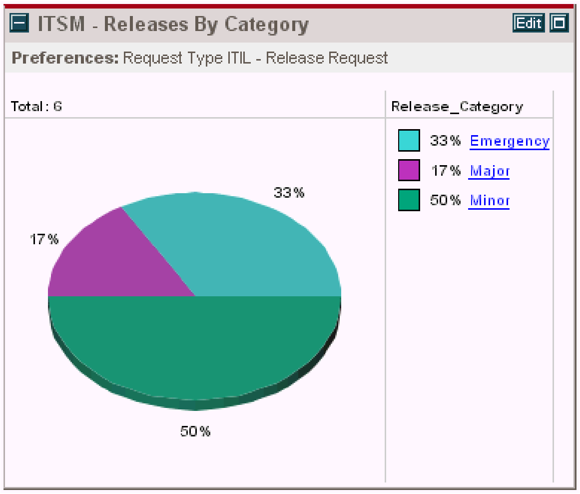


Figure 4-4. ITSM - Releases By Category portlet

> **Note**
> The ITSM - Releases By Category portlet's filter field, Request Type, should be set to **ITSM - Release Request.**

ITSM - Releases By Type

This portlet is provided to users with the role of Release Manager. It displays a pie chart representing the breakdown of releases by type. *Figure 4-5* shows the ITSM - Releases By Type portlet.

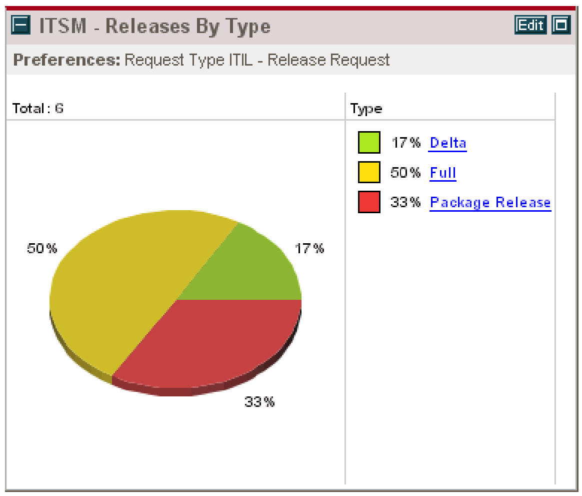


Figure 4-5. ITSM - Releases By Type portlet

Note

The ITSM - Releases By Type portlet's filter field, Request Type, should be set to **ITSM - Release Request.**

ITSM - Deployed Releases

This portlet is provided to users with the role of Release Manager. It displays a list of recently-deployed releases. *Figure 4-6* shows the ITSM - Deployed Releases portlet.

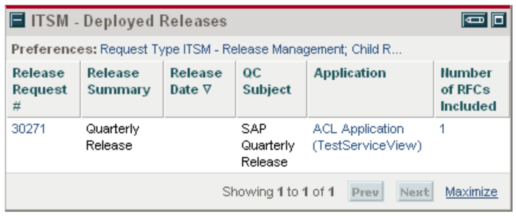


Figure 4-6. ITSM - Deployed Releases portlet

When used as part of the integration between the Accelerator and Mercury Business Availability Center, this portlet also includes a link to the Time Range Comparison report from Mercury Business Availability Center, which displays key performance indicator (KPI) data for the application before and after deployment, enabling you to analyze how deployment of a change affected the selected application.

You can configure the portlet's QC Subject column to drill down to the Releases portlet that can be imported from the Mercury Dashboard.

- For information on configuring portlet drill-downs, see the *Configuring the Standard Interface* guide.
- For information on importing the Releases portlet, see *Mercury Dashboard* on page 100.

This portlet can be used without enabling the integration by removing the Application and QC Subject columns from the list of displayed columns.

Note

In order for the portlet to display data, RFCs need to be added as child or related references to the release request. Additionally, an SLA needs to be created in Mercury Business Availability Center to see data displayed in the Change Outcome Report from Mercury Business Availability Center when the Application link is clicked. For more detailed information, see the "Service Level Administration" section in the Application Administration guide for Mercury Business Availability Center.

ITSM - RFCs per Release

This portlet is provided to users with the role of Release Manager. It displays a list of RFCs that compose a release. *Figure 4-7* shows the ITSM - RFCs per Release portlet.

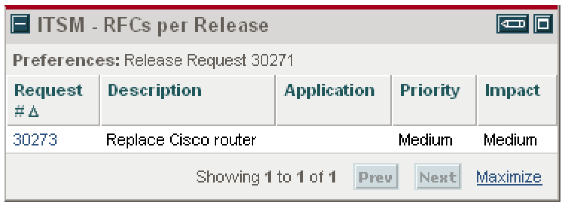


Figure 4-7. ITSM - RFCs per Release portlet

Though this portlet is specific to the integration between the Accelerator and Mercury Business Availability Center, it can be used without enabling the integration by removing the Application column from the list of displayed columns.

Using Release Management Portlets

To add Mercury IT Service Management Accelerator portlets to your Dashboard:

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

   The selected Dashboard page is displayed in the Personalize Dashboard page.
4. On the Personalize Dashboard page, click **Add Portlets.**

   The Add Portlets to Dashboard Page opens.

5. Search for the portlets to add.

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

    - To list specific portlets:

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

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

    c. Click **Find Portlets.**

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

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

    The selected portlets are added to the Dashboard page.

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

    The changes to the Dashboard are saved.

Release Manager Dashboard Page

The Mercury IT Service Management Accelerator includes a pre-configured Dashboard page for the role of Release Manager that includes the following portlets:

- ITSM - Open Releaess
- ITSM - My Releases
- ITSM - Releases by Category
- ITSM - Releases by Type
- ITSM - Deployed Releases

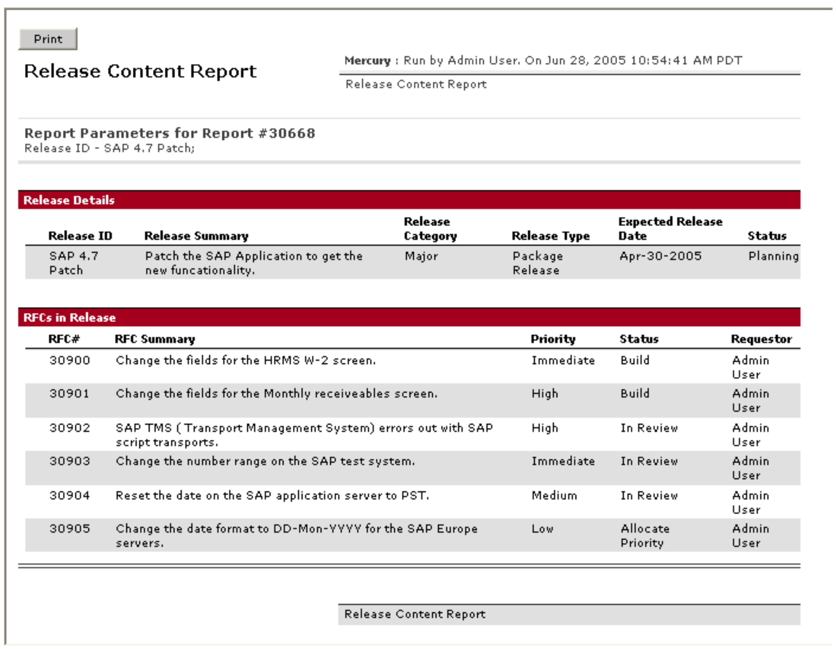
Users with the role of Release Manager can add this page to their Dashboards by clicking **Add Pre-configured Pages** on the Personalize Dashboard page and selecting **ITSM - Release Manager.**

Release Management Reports

The Mercury IT Service Management Accelerator includes several reports that can be run to provide summary data and scheduling information on releases in the system.

Release Content Report

The Release Content report provides a list of RFCs that have been incorporated into a release. *Figure 4-8* shows sample output for the Release Content report. *Table 4-5* describes the Release Content report's filter fields.



Print

Release Content Report

Mercury : Run by Admin User. On Jun 28, 2005 10:54:41 AM PDT

Release Content Report

Report Parameters for Report #30668
Release ID - SAP 4.7 Patch;

Release Details

Release ID	Release Summary	Release Category	Release Type	Expected Release Date	Status
SAP 4.7 Patch	Patch the SAP Application to get the new funcationality.	Major	Package Release	Apr-30-2005	Planning

RFCs in Release

RFC#	RFC Summary	Priority	Status	Requestor
30900	Change the fields for the HRMS W-2 screen.	Immediate	Build	Admin User
30901	Change the fields for the Monthly receiveables screen.	High	Build	Admin User
30902	SAP TMS (Transport Management System) errors out with SAP script transports.	High	In Review	Admin User
30903	Change the number range on the SAP test system.	Immediate	In Review	Admin User
30904	Reset the date on the SAP application server to PST.	Medium	In Review	Admin User
30905	Change the date format to DD-Mon-YYYY for the SAP Europe servers.	Low	Allocate Priority	Admin User

Release Content Report

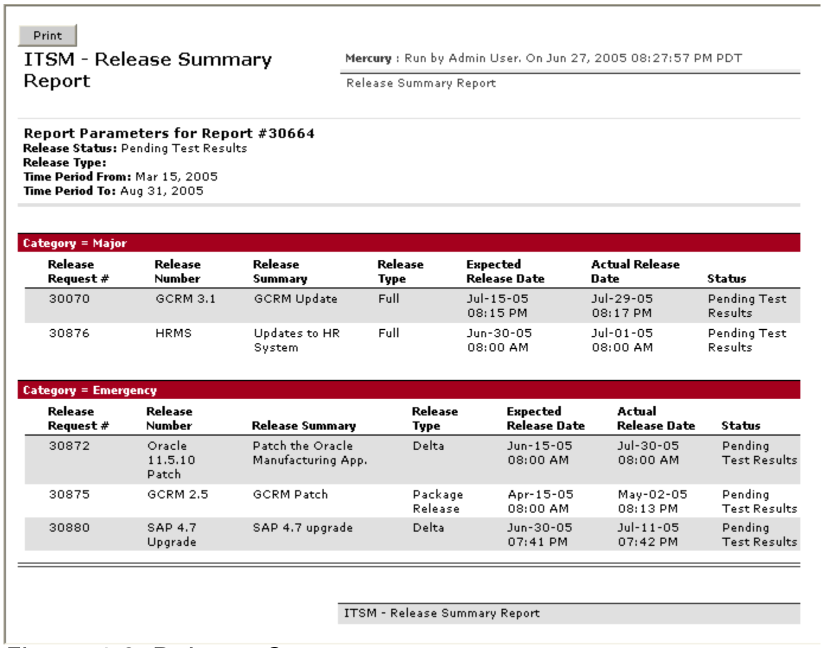
Figure 4-8. Release Content report output

Table 4-5. Release Content report filter fields

Field Name	Description
Report Title	The title of the report.
Request Type	Preset to **ITSM - Release Management** (should not be altered).
Release ID	Specify the release whose contents you want to list.

Release Summary Report

The Release Summary report provides a list of releases that have been implemented. *Figure 4-9* shows sample output for the Release Summary report. *Table 4-6* describes the Release Summary report's filter fields.



Print

ITSM - Release Summary Report

Mercury : Run by Admin User. On Jun 27, 2005 08:27:57 PM PDT

Release Summary Report

Report Parameters for Report #30664
Release Status: Pending Test Results
Release Type:
Time Period From: Mar 15, 2005
Time Period To: Aug 31, 2005

Category = Major

Release Request #	Release Number	Release Summary	Release Type	Expected Release Date	Actual Release Date	Status
30070	GCRM 3.1	GCRM Update	Full	Jul-15-05 08:15 PM	Jul-29-05 08:17 PM	Pending Test Results
30876	HRMS	Updates to HR System	Full	Jun-30-05 08:00 AM	Jul-01-05 08:00 AM	Pending Test Results

Category = Emergency

Release Request #	Release Number	Release Summary	Release Type	Expected Release Date	Actual Release Date	Status
30872	Oracle 11.5.10 Patch	Patch the Oracle Manufacturing App.	Delta	Jun-15-05 08:00 AM	Jul-30-05 08:00 AM	Pending Test Results
30875	GCRM 2.5	GCRM Patch	Package Release	Apr-15-05 08:00 AM	May-02-05 08:13 PM	Pending Test Results
30880	SAP 4.7 Upgrade	SAP 4.7 upgrade	Delta	Jun-30-05 07:41 PM	Jul-11-05 07:42 PM	Pending Test Results

ITSM - Release Summary Report

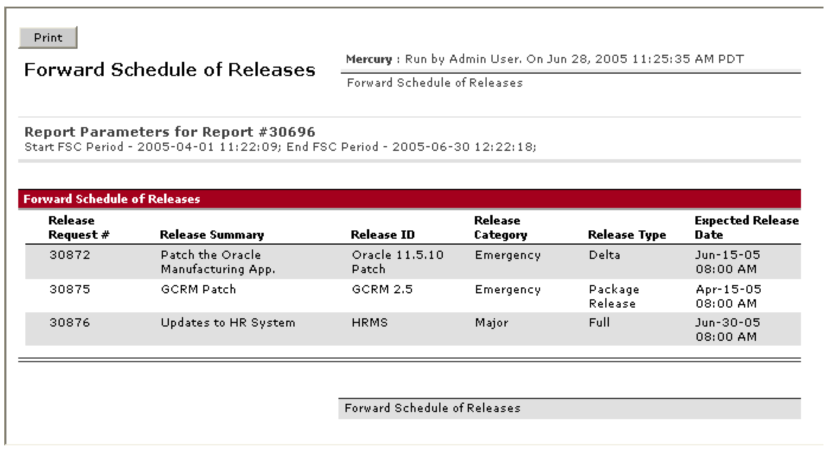
Figure 4-9. Release Summary report output

Table 4-6. Release Summary report filter fields

Field Name	Description
Request Type	Preset to **ITSM - Release Management** (should not be altered).
Release Status	Searches for releases with the specified statuses.
Release Type	Searches for releases of a specific type.
Time Period From	Searches for releases created after the specified date.
Time Period To	Searches for releases created before the specified date.

Forward Schedule of Releases Report

The Forward Schedule of Releases is a key report used in the release management process. The output of this report is a list of all releases that are scheduled to be implemented into the LIVE environment. *Figure 4-10* shows sample output for the Forward Schedule of Releases report. *Table 4-7* describes the Forward Schedule of Releases report's filter fields.



Print

Forward Schedule of Releases

Mercury : Run by Admin User. On Jun 28, 2005 11:25:35 AM PDT

Forward Schedule of Releases

Report Parameters for Report #30696

Start FSC Period - 2005-04-01 11:22:09; End FSC Period - 2005-06-30 12:22:18;

Forward Schedule of Releases

Release Request #	Release Summary	Release ID	Release Category	Release Type	Expected Release Date
30872	Patch the Oracle Manufacturing App.	Oracle 11.5.10 Patch	Emergency	Delta	Jun-15-05 08:00 AM
30875	GCRM Patch	GCRM 2.5	Emergency	Package Release	Apr-15-05 08:00 AM
30876	Updates to HR System	HRMS	Major	Full	Jun-30-05 08:00 AM

Forward Schedule of Releases

Figure 4-10. Forward Schedule of Releases report output

Table 4-7. Forward Schedule of Releases report filter fields

Field Name	Description
Report Title	The title of the report.
Start FSC Period	Searches for releases created after the specified FSC date.
End FSC Period	Searches for releases created before the specified FSC date.
Request Type	Preset to **ITSM - Release Management** (should not be altered).

Using Release Management Reports

To use Mercury IT Service Management Accelerator reports:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Reports > Submit New Report.**

   The Submit New Report page appears.
3. Select a report.

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

   - In the Recently Submitted Reports section, select a report. The report's submission page appears.
   - In the Report Category field, select **Demand Management.** The Submit New Report page is refreshed with the available reports. Select a report. The report's submission page appears.
4. On the report's submission page, fill in all the required filter fields, any optional filter fields, and click **Submit.**

   The Report Submitted page appears prior to the report.

Optional Integrations for Release Management

The Mercury IT Service Management Accelerator enables integration with other Mercury products for enhanced Release Management capabilities.

Mercury Quality Center

The Mercury IT Service Management Accelerator integrates with Mercury Quality Center to provide hierarchical synchronization of requirements in Mercury Quality Center with requests in Mercury IT Governance Center.

For more detailed information on installing and using the Mercury Quality Center integration, see the *Mercury IT Governance Center–Quality Center Integration Guide.*

Mercury Dashboard

The Mercury IT Service Management Accelerator integrates with the Mercury Dashboard to provide the following benefits:

- Automatic creation of subjects on Mercury Dashboard corresponding to test requirements created in Mercury Quality Center.
- Mercury Dashboard portlets, presented on the Mercury IT Governance Dashboard, that supply additional information about quality metrics for the RFCs aggregated per release.

Integration of the Accelerator with Mercury Change Control Management requires installation of the following:

- Mercury IT Governance Center release 6.0 Service Pack 10 (or later)
- Mercury Dashboard 9.0 on relevant client machines
- Mercury Dashboard Application Change Lifecycle 2.0 Add-in on the Mercury Dashboard Server
- Application Change Lifecycle module XML file on Mercury Dashboard

The *Mercury IT Governance Center–Quality Center Integration Guide* contains detailed information on this integration.

- For more detailed information on installing and configuring this integration, see the “Installation and Configuration” part.
- For more detailed information on importing the Releases portlet, see the “Installation at a Glance” chapter.
- For more detailed information on using this integration, see the “Working with IT Governance Center–Quality Center Integration” part.

Mercury Business Availability Center

The Mercury IT Service Management Accelerator integrates with Mercury Business Availability Center to provide the following benefits:

- Side-by-side KPI comparison. The side-by-side view displays pre-change and post-change SLA information from Mercury Business Availability Center side-by-side, for the application(s) that were affected by the change. This comparison is also useful for monitoring the application(s) following the deployment of the change to production, providing data that indicates whether the change has achieved its objectives. The comparison is displayed in the ITG dashboard by the ITSM - Deployed Releases portlet.

- In the event of problems in the production environment (determined by Mercury Business Availability Center and displayed in the Dashboard by the ITSM - CAB - Application Status in Production portlet), the user is able to review recent changes (using Mercury Change Control Management) and attempt to determine the root of the problem, with the capability of drilling down into the RFC in Mercury IT Governance Center.

For more detailed information on installing and using the Mercury Business Availability Center integration, see *Mercury Business Availability Center* on page 66.

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