Mercury IT Governance Center™
Guide to Customizing the Standard Interface
Version: 6.0

Executive Summary

This document explains how to alter the appearance of the Mercury IT Governance Center™ standard interface to include your business's company logo and match your color and font scheme.

This document makes the following assumptions:

- The reader has a Web browser with a View (Page) Source function (part of Internet Explorer)

- The reader has knowledge of CSS and HTML

The information in this document supersedes the first half of Chapter 11, "Customizing the Standard Interface," in *Configuring the Standard Interface*, which is part of the version 6.0 documentation suite.

For more information, contact Mercury Support at: support.mercury.com

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Overview of Customizing the Standard Interface

After installing Mercury IT Governance Center, you may want to change certain aspects of the standard interface to better suit your company's needs; for instance, you may want to match your company's branding. Many aspects of the standard interface can be customized, including:

- Corporate logo in upper left-hand corner

- Fonts

- Colors

The standard interface's look and feel are governed by the presentation layer, which is made up of the following types of files:

- GIF logo files

- Cascading style sheets (CSS)

- JSP pages

The standard interface comprises different areas whose appearances are governed by different sets of CSS files. *Figure 1-1* shows the standard interface and indicates each of these areas.
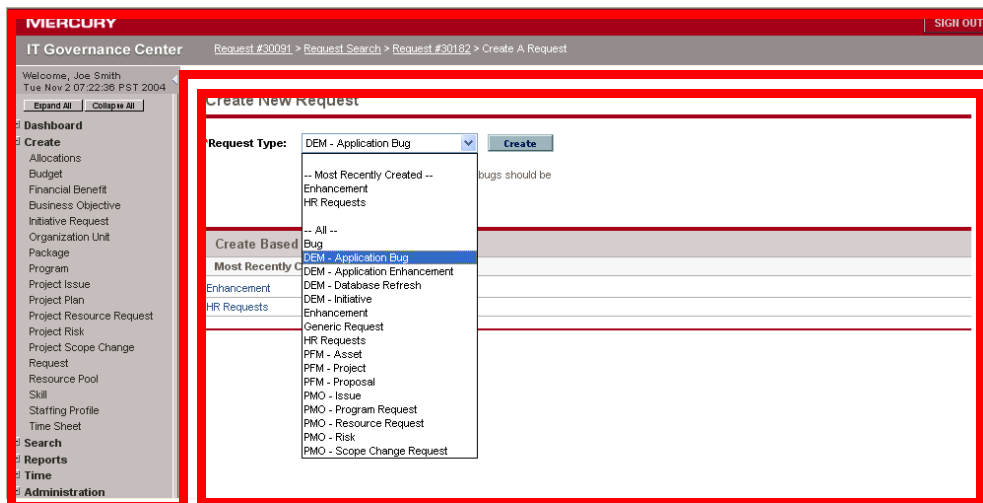

Figure 1-1. Mercury IT Governance standard interface

The areas are as follows:

- **Menu bar and top of the standard interface.** This includes the logo in the upper left-hand corner. In general, the presentation layer files for this area are located in the *<ITG_Home>*`/server/kintana/deploy/itg.war/web/global` directory. Changes made to the presentation layer files for this region tend to be near-global in scope.

- **Mercury IT Governance Dashboard™ tabs, pages, and portlets.** Anything to the right of the menu bar and below the top of the standard interface falls into this region. In general, the presentation layer files for this region are located in the `dashboard.war` file. Changes made to presentation layer files for this area tend to be specific to a page or portlet.

- **Other non-Dashboard pages.** Anything to the right of the menu bar and below the top of the standard interface that is not related to the Dashboard (such as Request Creation, Request Detail, and so forth) have a different set of CSS files, located in `itg.war/web/knta/.../*.css`.

Directory Structure

To customize the standard interface, you need to edit files stored in various directories on the Mercury IT Governance Server. This section discusses the directories relevant to this sort of customization, where they are located, and what they contain.

The variable `<ITG_Home>` refers to the top directory of the Mercury IT Governance Server. `<ITG_Home>` is on the computer hosting the Mercury IT Governance Center server.

The `<ITG_Home>` directory contains the file `server.conf` and all Mercury IT Governance Center subdirectories. The following lists the two subdirectories used when customizing the standard interface:

- **server.** The `server` subdirectory contains a directory named `kintana`, which contains folders that hold various types of files used by the Mercury IT Governance Server. In a single server configuration, the `server` subdirectory will contain the `kintana` directory only, which is the default name used for the Mercury IT Governance Server instance. In a server cluster configuration, each server must have its own directory within `<ITG_Home>/server`. The name of the directory must match the name of the Mercury IT Governance Server instance.

  Within the `<ITG_Home>/server/kintana/deploy/itg.war/web` directory are several subdirectories. One such directory is the `knta` directory, which contains the `global` subdirectory.

  - **global.** The `global` subdirectory is reserved for files that affect JSP pages systemwide. The following lists the subdirectories under the `global` directory.

    - **images/en.** The `images/en` subdirectory contains most of the global GIF files for a typical English-language installation of Mercury IT Governance Center. Other `images` subdirectories at the same level as `/en` contain the global GIF files for other languages.

    - **css.** The `css` subdirectory contains most of the global CSS files.

  - **dashboard.war.** The `dashboard.war` file contains the CSS files for the Mercury IT Governance Dashboard and its elements. The `dashboard.war` file and its contents need to be unzipped before you can make changes to the Dashboard. The path for the `dashboard.war` file is: `<ITG_Home>/server/kintana/deploy/dashboard.war`.

Changing the Presentation Layer for the Standard Interface

The presentation layer for the standard interface can be customized in the following ways:

- Logo GIF files can be replaced

- Fonts and colors can be changed using the cascading style sheets (CSS files)

- JSP pages can be modified

Replacing Logo GIF Files

This section details how to change the Mercury IT Governance Center logo. The Mercury IT Governance Center logo is composed of two GIF files:

- `CorporateBrand.gif`

- `CenterBrand.gif`

These images are found in the upper left-hand corner of the standard interface (see *Figure 1-2*), and are used when the standard interface includes the menu bar. Their dimensions are as follows:

- Width: 185 pixels

- Height: 20 pixels

Figure 1-2. Standard interface logo images

Global GIF files, such as `CorporateBrand.gif and CenterBrand.gif,` are located in the directory:

`<ITG_Home>/server/kintana/deploy/itg.war/web/knta/global/images/en`

To replace the Mercury logo in the header, replace the `CorporateBrand.gif` and `CenterBrand.gif` image files. When replacing GIF files, make sure the new GIF files correspond to the existing GIF file's width and height, and have transparent backgrounds.

To change the GIF file logos:

1. Log on to Mercury IT Governance Server.

2. Go to the directory:
   `<ITG_Home>/server/kintana/deploy/itg.war/web/knta/global/images/en`

3. Rename the file `CorporateBrand.gif` to `CorporateBrand-old.gif`.

4. Rename the file `CenterBrand.gif` to `CenterBrand-old.gif`.

5. Copy the new GIF files to the directory:
   `<ITG_Home>/server/kintana/deploy/itg.war/web/global/images/en`

6. Rename the new GIF files as `CorporateBrand.gif` and `CenterBrand.gif`.

> **Note** During a system upgrade, the directory
> `<ITG_Home>/server/kintana/deploy/itg.war/web/global/images/en`
> is overwritten. Changes made to this directory will not be preserved. You need to
> reapply your customizations each time you upgrade.

Changing Fonts and Colors

Font- and color-related changes to the standard interface include adjustments to:

- Fonts

- Point sizes

- Background color

- Foreground color

These elements are set using global style sheets. Global style sheets are standard HTML cascading style sheets (CSS files). Style classes, defined in the CSS files, are used to centralize the definition of fonts, point sizes, background, and foreground colors.

JSP page files can reference the CSS files directly, such as:

```
<link rel=stylesheet
href='<%=localeCtrl.getCSSFileName("../global/css/PortletPersonalization.css",
request)%>' type='text/css'>
```

or by referencing the HTML global style sheet file, such as:

```
<link rel=stylesheet
href='<%=localeCtrl.getCSSFileName(AddressLink.GLOBAL_STYLE_SHEET, request)
%>' type='text/css'>
```

`GlobalStyleSheet.css` is the global style sheet used for the standard interface. The `GlobalStyleSheet.css` file is in the directory:
`<ITG_Home>/server/kintana/deploy/itg.war/web/knta/global/css`

Example: JSP, CSS, and the Interface

To illustrate how JSP and CSS files interact with each other to provide the definition of the appearance of the standard interface, consider the Create New Request page. The Create New Request page is a JSP page in the standard interface. The look and feel of the Request Type field is governed by a CSS file.

- In the JSP `RequestCreateList.jsp`:

```
<td class='field-prompt' nowrap><span>Request Type:</span></td>
```

- In the CSS `GlobalStyleSheet.css`:

```
.field-prompt
{
    font-family: Arial, Verdana, sans-serif;
    font-size: 11px;
    font-weight: bold;
    color: #000000;
    padding-right: 10px;
    padding-top: 5px;
    padding-bottom: 5px;
}
```

- In the interface:

Figure 1-3 shows the appearance of the Request Type field in the Create New Request page.

Figure 1-3. Standard interface: Request Type field

Changing Fonts and Colors for the Menu Bar and Top Area

To make changes to the fonts and colors displayed in the menu bar and top of the standard interface:

1. Log on to Mercury IT Governance Center.

   The standard interface opens.

2. Using your Web browser, open the HTML source for the page.

3. Look through the HTML for the style element you want to change.

   Only style elements affecting the menu bar and top of the standard interface should be examined. One good time-saving technique is to search for an unusual word that appears near the element you want to change, such as a person's name.

4. Log on to Mercury IT Governance Server.

5. Go to the directory: `<ITG_Home>/server/kintana/deploy/itg.war/web/knta/global/`.

6. Search across the `global` subdirectory for the style element you want to change.

   The style element may be controlled from several different CSS files.

   - If you are using a language read from left to right, such as English, CSS files with names ending in `*_rtl.css` can be ignored.

   - If you are using a language read from right to left, such as Hebrew, only CSS files with names ending in `*_rtl.css` should be considered.

7. Using a standard text editor, edit each CSS file to include the change to the desired style element.

8. Save your changes.

   The changes made to the style sheets are immediately reflected in the standard interface. Users logging into the standard interface will immediately see changes. Users already logged on will see changes at their next browser window refresh.

> **Note** Changes made to an existing style sheet will not be preserved when the system is upgraded. You need to reapply your customizations each time you upgrade.

Example: Changing the Sign Out Button

Suppose you want to change the look and feel of the **Sign Out** button in the upper-right corner of the standard interface.
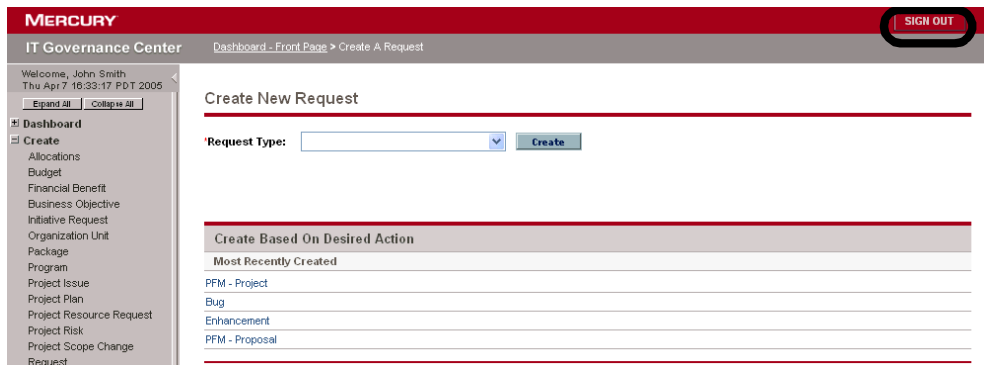

Figure 2. Sign Out button

1. Log on to Mercury IT Governance Center and open the Create New Request page.

2. Open the HTML source for the Create New Request page.

3. Search the source for the words "Sign Out" until you find the following line:

   ```
   <td><span class='signOutBtn1'><a href="javascript:onLogout()">SIGN
   OUT</a></span></td>
   ```

4. Log on to Mercury IT Governance Server and go to the directory:
   ```
   <ITG_Home>/server/kintana/deploy/itg.war/web/knta/global/
   ```

5. Search across the `global` subdirectory for the string `signOutBtn1`.

   The term appears in the file `GlobalStyleSheet.css`, in the `css` subdirectory.

   ```
   span.signOutBtn1{
       font-family: Arial, Verdana, sans-serif;
       font-size: 11px;
       font-weight: bold;
       display: block;
       border: 1px solid #690012;
       text-decoration: none;
   }
   ```

6. Make the desired changes to the `signOutBtn1` style and save the `GlobalStyleSheet.css` file.

Changing Fonts and Colors for the Mercury Dashboard

This procedure details how to change the fonts and colors for the Mercury Dashboard.

To make changes to the fonts and colors displayed in the Dashboard:

1. Log on to Mercury IT Governance Center.

   The standard interface opens.

2. Using your Web browser, open the HTML source for the page.

3. Look through the HTML for the style element you want to change.

   Only style elements affecting the Dashboard should be examined.

4. Log on to Mercury IT Governance Server.

5. Copy the `dashboard.war` file to a separate, temporary location.

6. Unzip the `dashboard.war` file with a standard zip utility.

7. Search the resulting files for the style element you want to change.

   The style element may be controlled from several different CSS files.

   - If you are using a language read from left to right, such as English, CSS files with names ending in `*_rtl.css` can be ignored.

   - If you are using a language read from right to left, such as Hebrew, only CSS files with names ending in `*_rtl.css` should be considered.

8. Using a standard text editor, edit each CSS file to include the change to the desired style element.

9. Save your changes.

10. Zip the `dashboard.war` file with a standard zip utility.

11. Stop the Mercury IT Governance Server.

12. Place the new `dashboard.war` file into its original location.

13. Restart the Mercury IT Governance Server.

Note	Changes made to an existing style sheet will not be preserved when the system is upgraded. You need to reapply your customizations each time you upgrade.

Example: Changing a Portlet Title Style

Suppose you want to change the look and feel of your Budget To Budget Comparison portlet title.
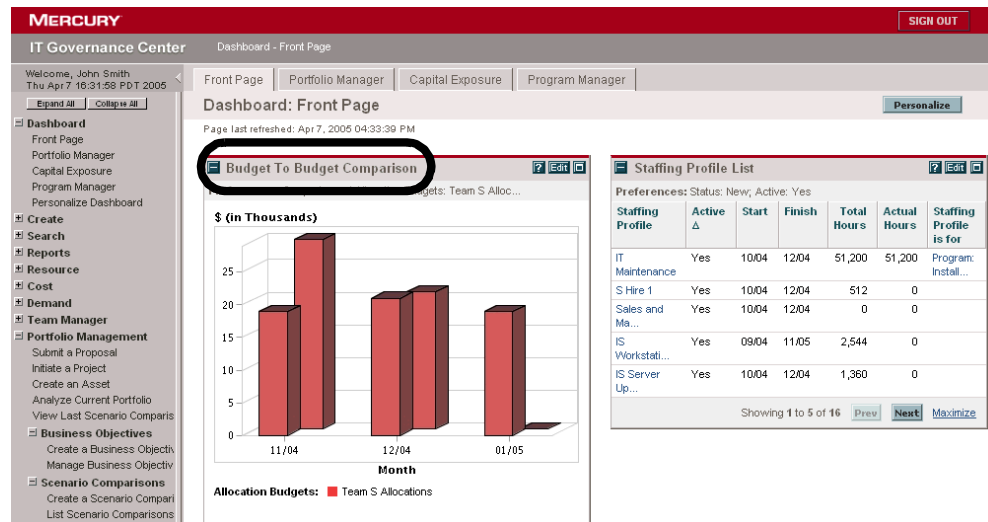

Figure 3. Budget To Budget Comparison portlet title

1. Log on to Mercury IT Governance Center and navigate to the Dashboard page that contains the Budget To Budget Comparison portlet.

2. Open the HTML source for that Dashboard page.

3. Search the source for the words "Budget To Budget" until you reach the following line:

```
<td class='portlet-title portlet-title-spacing' rowspan=2>Budget To Budget
Comparison</td>
```

4. Log on to Mercury IT Governance Server.

5. Copy the `dashboard.war` file to a separate, temporary location.

6. Unzip the `dashboard.war` file with a standard zip utility.

7. Search across the resulting files for the string `portlet-title`.

    The term appears in the `dashboard.css` file.

```
td.portlet-title {
    font-family: Arial, Verdana, sans-serif;
    font-size: 13px;
    font-weight: bold;
    color: #635E57;
}
```

8. Make the desired changes to the `td.portlet-title` style and save the `dashboard.css` file.

9. Zip the `dashboard.war` file with a standard zip utility.

10. Stop the Mercury IT Governance Server.

11. Place the new `dashboard.war` file into its original location.

12. Restart the Mercury IT Governance Server.

Modifying JSP Pages

Modifying the common header and footer JSP pages is another way to change the look and feel of the standard interface. The following is a list of the most common JSP pages:

- `Header.jsp.` Determines the look of the menu bar and header for most pages.

- `Footer.jsp`. Determines the look of the footer for most pages.

- `SimpleHeader.jsp`. A simple version of the normal header JSP page used for certain pages that do not need a menu bar.

- `SimpleFooter.jsp`. A simple version of the normal footer JSP page used for certain pages.

JSP page files are found in the directory:

`<ITG_Home>/server/kintana/deploy/itg.war/web/knta/global/`

> **Note**   Changes made to existing JSP page files will not be preserved when the system is upgraded. You need to reapply your customizations each time you upgrade.

Common Header File (Header.jsp)

The common header file, `Header.jsp`, affects the standard interface layout. `Header.jsp` divides the page into three main sections:
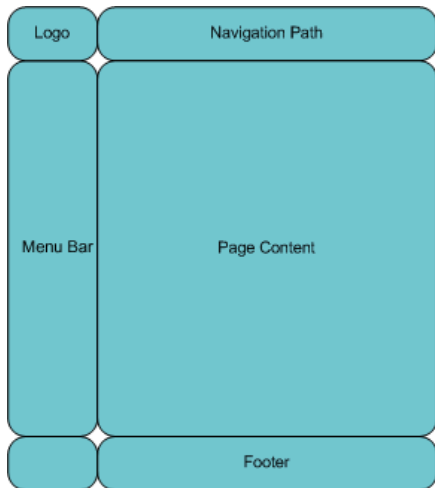
- Navigation path

- Menu bar

- Page content

Figure 1-4. Standard interface page

Every time `Header.jsp` gets called, navigation path, menu bar, and page content are generated. By default, any pages that include the `Header.jsp` will get the navigation path and the menu bar. However, it is possible to control whether the menu bar or navigation path should be displayed.

● **Menu Bar.** The variable, *displayMenuFlag*, sets whether the menu bar should be displayed. Set *displayMenuFlag* to **True** to display the menu bar. Set *displayMenuFlag* to **False** so that the menu bar is not displayed.

> **Note** Every page that contains the `Header.jsp` file must also include the `Footer.jsp` file.

JSP Page Definitions

It is possible to modify the presentation layer by changing your JSP pages. JSP pages are dynamic HTML documents which are interpreted by the Mercury IT Governance JSP engine prior to being presented to a Web browser. Before you change your JSP pages, note the following points:

● JSP pages contain tag-like entries like:

```
<knta:I18NGetBundle bundleName="KEXP_Resources" />
```

These tags are not standard HTML tags. The tags act as placeholders where the JSP engine should insert information known at the time of the user's request on the server side.

● JSP pages often contain Java code that sends and retrieves data from the Mercury IT Governance Server, or pulls information stored in the user's session.

● JSP pages may also contain client-side JavaScript. JSP pages often use dynamically provided information in client-side JavaScript (`<SCRIPT language='Javascript'>` tags).

Guidelines for Modifying JSP Pages

The best practice recommendations for editing the global JSP page files include:

- JSP page files should be edited in a plain-text editor or a Web-authoring tool that can understand JSP and JavaScript tags.

- Never edit the live JSP page files directly on the production system. Changes to these files are immediately reflected in the system. Any error in modifying this file can prevent access to the system for all users.

- Be methodical when making changes to the JSP files. Save changes frequently. Check them by reloading the relevant screen in the browser. It may be necessary to reconfigure the browser to prevent page caching.

- Java code changes should be avoided unless there is an explicit open API to use. All other Java code changes are not supported.

- Mercury recommends that the standard development processes for documentation and source control be applied to the processes for changing any JSP page and related files.

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