# Mercury IT Governance Center™

# **Configuring the Standard Interface**

Version: 7.0



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#### In This Chapter:

- Introduction to the Standard Interface
- Overview of Configuring the Standard Interface
- Standards-Based Portlet Support
- The Configuration Process
- Related Information

## **Introduction to the Standard Interface**

Most Mercury IT Governance Center<sup>TM</sup> users work solely in the standard interface, although some may use the Mercury IT Governance Workbench as well. The standard interface opens in your Web browser and from it, you can run reports, create requests, and search for packages, among other things. A key feature of Mercury IT Governance Center is the Mercury IT Governance Dashboard<sup>TM</sup> which provides you with a real-time view into your Mercury IT Governance Center–based activities.

Using the Dashboard's portlets, you can view almost anything, from the status of requests assigned to you, to comparisons between current projects and staffing profiles. *Figure 1-1* shows a Dashboard page that relies on three Mercury-supplied portlets: Program List, Total Budget, and Request List.



Figure 1-1. Personalized Dashboard page

When you first log on to Mercury IT Governance Center, you are presented with a pre-installed Dashboard page called the "Front Page." As a user, you may want to *personalize* this page or add other personalized Dashboard pages, such as "My Personalized Page" shown in *Figure 1-1*.

## **Overview of Configuring the Standard Interface**

It is often desirable for managers (or similar lead personnel) to create, maintain, and share *configured* Dashboard pages and portlets to facilitate communication and coordination for their own projects. For example, your recruiting organization might share the list of current job openings.

Configuring the standard interface in this manner provides a mechanism for managers to share real-time information up and/or down the "chain of command."



The individuals who plan, set up, and maintain Mercury–based applications are generally called "application administrators" (or "configurators") and their responsibilities may also include configuring Dashboard pages.

*Figure 1-2* provides a visual overview of the different types of Dashboard pages. This document focuses on the application administrator-configured Dashboard pages; however, Chapter 4, *Creating and Maintaining Dashboard Pages and Modules,* on page 119 briefly describes how users can add preconfigured Dashboard pages.

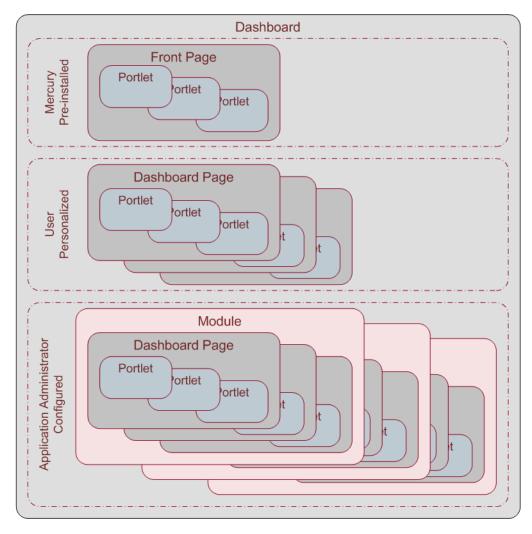
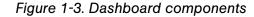
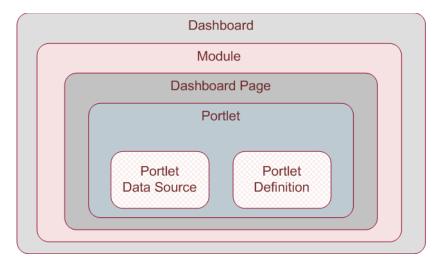


Figure 1-2. Various types of Dashboard pages

*Figure 1-3* details the major components that make up configured Dashboard pages and depicts their relationships.





**Dashboard.** The Mercury IT Governance Dashboard is one of the key applications provided with Mercury IT Governance Center.

In addition to the pre-installed "Front Page" Dashboard page and optional user-personalized Dashboard pages, the Dashboard can include one or more modules.

• Module. A module is the "container" for one or more Dashboard pages.

Modules are created much like a Dashboard page is personalized by an individual user. Modules are created by application administrators; however, they may not necessarily be maintained by them.

Once complete, a module can be:

- Published to user Dashboards
- Distributed to user Dashboards
- Made the default Dashboard for one or more of the Mercury IT Governance Center users
- Provided as a preconfigured Dashboard content for one or more of the Mercury IT Governance Center users to add to their own Dashboard

Dashboard page. A Dashboard page is the "container" for one or more portlets.

Dashboard pages within a module can be added, modified, and deleted. Similarly, on each Dashboard page, portlets can be added, modified, or deleted.

 Portlet. Portlets are the key visualization component of the Dashboard and display information relevant to your Mercury IT Governance Center data. Mercury provides numerous portlets and additional (personalized or configured) portlets can be created.

In general, portlets rely on the following:

- □ **Portlet data sources.** These are the SQL queries used to gather the information from the Mercury IT Governance Center database.
- Portlet definitions. These are the XML files that define the look and feel of a portlet. Portlet definitions include such information as the type of portlet, user and group access to the portlet, and filter field definitions.

### **Standards-Based Portlet Support**

Mercury IT Governance Center is a Java-compliant portal, and provides support for Java-compliant portlets that are not included with Mercury IT Governance Center. Java portlets can be developed using the Java API, purchased from vendors (such as Sun Microsystems), or obtained with products (such as WebLogic Portal).

WSRP-compliant portlets are also supported by Mercury IT Governance Center. Web Services for Remote Portlets (WSRP) allows portals to "publish" portlets so that other portals can "consume" them. Use of WSRP portlets simplifies integration between systems and can reduce programming overhead as well as provide continuity for users of multiple systems. Note

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

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

To facilitate diagnosis, customers reporting problems to Mercury Support (http://support.mercury.com) are required to provide a simple, reproducible case that demonstrates the error in the Mercury IT Governance Dashboard.

## **The Configuration Process**

As you might surmise from the information displayed in *Figure 1-3* on page 15, customizing the standard interface can require a number of steps. In general, the process is as follows:

- 1. Create a portlet:
  - a. Create a portlet data source. See Chapter 2, *Creating and Maintaining Portlet Data Sources,* on page 19, for specifics.
  - b. Create a portlet definition. See Chapter 3, *Creating and Maintaining Portlet Definitions,* on page 47, for more information.
- 2. Create a module and a Dashboard page. See Chapter 4, *Creating and Maintaining Dashboard Pages and Modules*, on page 119, to learn more about these topics.
- 3. Share the module. See Chapter 5, *Providing Modules To Users*, on page 143, for details about this subject.

# **Related Information**

The following documents also include information related to configuring the standard interface:

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



#### In This Chapter:

- Overview of Portlet Data Sources
- Searching For and Viewing Existing Portlet Data Sources
- Creating or Modifying Portlet Data Sources
  - **Completing the General Information Section**
  - Completing the Data Source Tab
  - Completing the Filter Fields Tab
  - Completing the Ownership Tab
- Copying Portlet Data Sources
- Deleting Portlet Data Sources
- Viewing Portlet Definition Usage
- Supplemental Details for the Data Source Column Window
  - Text–Based Column Types Details
  - Hyperlink Column Type Details
  - Currency Column Type Details

## **Overview of Portlet Data Sources**

Portlet data sources contain the following components:

- The filter fields found on the portlet's edit page.
- The permissions allowing editing of the portlet data source.
- The SQL query used by the portlet definition to retrieve data from the Mercury IT Governance Center database.

A portlet data source SQL query consists of the following:

□ SELECT/FROM. This statement is used to select columns from the designated database table.

These columns are used by the portlet definition, such as a column in a list portlet or the x-axis in a bubble chart portlet.

For example:

SELECT OBJECT\_TYPE, OBJECT\_NAME, REVISION\_NUMBER FROM KACC\_PSFT\_VC\_V

**WHERE.** This clause is used to specify selection criterion.

For example:

WHERE LOCKED FLAG="Y"

□ **GROUP BY or ORDER BY.** These keywords are used to aggregate or sort the result.

For example:

ORDER BY OBJECT TYPE

The following is a complete SQL query for a portlet data source:

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

Portlet definitions and portlet data sources have the following relationships:

- A portlet definition can be linked to only one portlet data source.
- A portlet data source can be linked to multiple portlet definitions.

Portlet data sources are constructed using the Data Source Workbench, sometimes called the Data Source Builder.

From the Data Source Workbench you can:

- Search for and view portlet data sources; see Searching For and Viewing Existing Portlet Data Sources on page 22
- Create new portlet data sources or modify existing ones; see Creating or Modifying Portlet Data Sources on page 24
- Use existing portlet data sources as the basis for new portlet data sources; see *Copying Portlet Data Sources* on page 39
- Delete existing portlet data sources; see *Deleting Portlet Data Sources* on page 41
- View portlet definition usage; see Viewing Portlet Definition Usage on page 42

Mercury-supplied portlet data sources cannot be modified or deleted.

## **Searching For and Viewing Existing Portlet Data Sources**

To search for a portlet data source:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Open Workbench.

The Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

M Data	a Source Workbe	ench [	
ResultsQuery	Query: Data Source Name:		
	New Data Source	e Max Rows 200 Save Query Clear Li	st

4. On the Query tab, provide the search criteria.



To display all portlet data sources, click **List** without providing any search criteria.

5. Click List.

The **Results** tab appears, displaying the results of the search.

2	Data Source Name	Description	Enabled	
Query	My Packages	Displays all Packages created by or assigned to th	Y	
	My Requests	Displays all Requests created by or assigned to th	Y	
ts	My Tasks	Displays all Project Tasks currently assigned to yo	Y	
Results	Package List	Package List	Y	
å	Program Issue List	Portlet listing open issues associated with a Progr	Y	
	Program List	Displays the programs and their summary conditi	Y	
	Program Project List	Displays projects within a specified program	Y	
	Program Risk List	Portlet listing open Risks associated with a Progra	Y	
	Program Scope Change List	Portlet listing open Scope Change requests assoc	Y	
	Resource Assignments	Displays the packages, requests, and tasks assig	Y	
	Resource Pool List	Resource Pool List Portlet	Y	
	Staffing Profile List	Staffing Profile List Portlet	Y	
	TMG - Actuals for Direct Reports	Shows the total time entered by all the direct report	Y	
	<		>	8
	New Or	oen Copy Delete <b>Refresh</b>		

- 6. (Optional) To view a portlet data source, either:
  - Double-click a portlet data source.
  - Select a portlet data source and click **Open**.



Use the **Shift** or **Ctrl** keys to select multiple portlet data sources.

The Data Source : < Data Source Name> window opens.

M Data Source : Program List				
Data Source Name: Program List		Time-out Use Default	20	Seconds
Description: Displays the pr	ograms and their sum	mary conditions		
Enabled: 💿 Yes	⊖ No			
Data Source Filter Fields Portlet	Definitions Ownershi	ip		
Full Query for the Data Source				
group by program_name, p.program_id, relative_priority, program_state_meaning, program_manager_full_name, program_manager_email_add program_manager_phone_nui issue_summary, risk summary,	Iress,			~
cost_summary, scope_change_summary, resource_request_summary, show_issues_flag, show_risks_flag, show_scope_changes_flag				
View Query	Use Bind Varia	bles?		
	🔿 Yes 💿 No			
Verify		[	OK Save	Cancel
Ready				

## **Creating or Modifying Portlet Data Sources**

To update an existing portlet data source, or create an entirely new portlet data source:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Open Workbench.

The Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

M Data	a Source Workbe	ench			
Query	Query: Data Source Name:	None	Enabled:	ALL	*
Results					
	New Data Source	Max R	ows 200	Save Query Clear	List
	Ready				

- 4. To:
  - Create an entirely new portlet data source, either:
    - □ On the Query tab, click New Data Source.
    - □ On the **Results** tab, click **New**.
  - Modify an existing portlet data source:
    - □ View the portlet data source (as described in *Searching For and Viewing Existing Portlet Data Sources* on page 22).

Note

Mercury-supplied portlet data sources cannot be modified.

M Data Source : Untitled1			
ata Source Name:	Time-out Us	e Default 🛛 💙 20	Seconds
Description:			
Enabled: 🔿 Yes	⊙ No		
Data Source Filter Fields Po	ortlet Definitions Ownership		
Fun query for the Data Gource			
SELECT			
Edit Query	Use Bind Variables?		
	🔿 Yes 💿 No		
Verify		OK Save	Cancel
Ready			

The Data Source : < Data Source Name> window opens.

- 5. Provide information for each of the following areas before proceeding to the next step.
  - General information. Use these fields to set general information regarding the portlet data source, such as the name of the portlet data source and its description. See *Completing the General Information Section* on page 26 for details.
  - Data Source. Use this tab to define the columns of the portlet data source and create the SQL query. See *Completing the Data Source Tab* on page 28 for details.
  - Filter Fields. Use this tab to create the filter fields found on a portlet's edit page. See *Completing the Filter Fields Tab* on page 36 for details.
  - **Ownership**. Use this tab to set who can edit the portlet data source. See *Completing the Ownership Tab* on page 38 for details.

Note

The **Portlet Definitions** tab is used to identify which portlet definitions rely on this portlet data source. A new portlet data source will not have any portlet definitions associated with it.

This tab is detailed in *Viewing Portlet Definition Usage* on page 42.

6. (Optional) At any time, you can click **Save** to commit your changes. See the tip following *Table 2-1* on page 27 for additional considerations and suggestions.

You can also click **Cancel** to discard any changes. However, if you have provided a unique **Data Source Name** and clicked **Save** (at least once), the portlet data source has been created with the information entered as of the last **Save**.

 (Optional, although highly recommended) On the Data Source : <*Data* Source Name> window, click Verify to validate the SQL statement.

Make any necessary corrections to the SQL by clicking **Edit Query** on the **Data Source** tab.

8. Click **OK** to save your changes and close the window.

The Data Source : *<Data Source Name>* window closes and the Data Source Workbench is updated.



On the **Results** tab, click **Data Source Name** to have the portlet data sources appear in alphabetical sequence. Clicking **Data Source Name** a second time reverses the sort order.

### **Completing the General Information Section**

Figure 2-1. General information area for portlet data sources

M Data Source : Program L	.ist				
Data Source Name: Program L	_ist	Tim	e-out Use Default	20	Second
Description: Displays t	he programs and	their summary	conditions		
Enabled: 💿 Yes	⊖ No				
Data Source   Filter Fields   P	ortlet Definitions	Ownership			
Full Query for the Data Source					
group by program_name, p.program_id, relative_priority, program_manager_full_n program_manager_email program_manager_phone issue_summary, risk_summary, cost_summary, scope_change_summary resource_request_summ show_issues_flag, show_risks_flag,	ame, Laddress, e_number, ; ary,				<
View Query	Use	Bind Variables	?		
		/es 💿 No			
Verify				OK Save	Cancel
Ready					

To complete (or update) the general information area of the Data Source : *<Data Source Name>* window:

1. Provide the settings using the information from the following table.

Table 2-1. Portlet data source g	general information	field descriptions
----------------------------------	---------------------	--------------------

Field Name (*Required)	Description
*Data Source Name	Specify a unique name for the portlet data source. Type any alphanumeric string.
Time-out	Select the timeout to use. Choices include: Use Default Data Source Specific
Seconds	If <b>Time-out</b> has a value of <b>Data Source Specific</b> , specify the number of seconds before the portlet data source's query should time out. Type any integer greater than zero.
Description	Specify a description for the portlet data source. Type any alphanumeric string.
Enabled	Indicate whether or not this portlet data source is available for use.



To allow incremental saving of your settings without impacting any users, set the **Enabled** field to **No** when initially defining the portlet data source. Once the portlet data source definition is complete, reset this field to **Yes**.

2. (Optional) Click Save to commit these changes.

### **Completing the Data Source Tab**

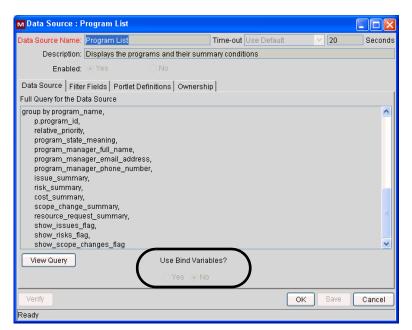


Figure 2-2. Data Source tab for portlet data sources

To complete (or update) the **Data Source** tab of the Data Source : *<Data Source Name>* window:

1. Set Use Bind Variables.

The Use Bind Variables option should be set to Yes, except when:

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

2. Click Edit Query.

The Query Definition window opens.

Query Definition				
Select/From Vvhere/Filter	Group By/Order By			
Select				
Select				
		xpression to creat	e columns for the SELECT portion of the query and ente	
the FROM portion direc	tly.			
Column Name	Column Type	Description	SQL	
RISK_SUMMARY	Summary Condition/		decode(show_risks_flag,'Y',risk_summary,null)	
RISK_COUNT_HYP	Text		decode(show_risks_flag,'Y',decode(max(risk_count)	
RISK_COUNT	Text		decode(show_risks_flag,'Y',max(risk_count),null)	
SCOPE_CHANGE	Summary Condition/		decode(show_scope_changes_flag,'Y',scope_chan	
SCOPE_CHANGE	Text		decode(show_scope_changes_flag,'Y',decode(max(	
	Text		decode(show_scope_changes_flag,'Y', max(scope	
PROGRAM_STATE	Text		program_state_meaning	
ISSUE_COUNT	Text		decode(show_issues_flag,'Y',max(issue_count),null)	
PROGRAM_NAME	Text		program_name	
RELATIVE_PRIORITY	Number		relative_priority	
PROGRAM_MANAG	Text		program_manager_full_name    ''    program_mana	
ISSUE_SUMMARY	Summary Condition/		decode(show_issues_flag,Y',issue_summary,null)	
ISSUE_COUNT_HY	Text		decode(show_issues_flag,'Y',decode(max(issue_co	
PROGRAM_ID	Number		p.program_id	
PROGRAM MANAG	Text		program manager full name	
PROGRAM NAME H	Hyperlink		p.program_id	
		Add Edit	Remove	
om Clause:				
FROM kpmo_program_	list_v p, kpmo_program	ns_vpv		
			_	
		Enlarge		
here/Group By/Having/Or	der By Clauses:			
resource request	•			
show_issues_flag,				
show_risks_flag, show_scope_chan	ann floa			
snow_scope_chan	yes_nay			
View Full Query			OK Apply Cance	
eady				

- 3. Provide the following information before proceeding to the next step.
  - Select/From. Use this tab to create the columns and add the SELECT and FROM clauses for the SQL query. See *Completing the Select/From Tab* on page 30 for details.
  - Where/Filter. (Optional) Use this tab to add WHERE clauses to the SQL query. See *Completing the Where/Filter Tab* on page 32 for details.
  - Group By/Order By. (Optional) Use this tab to add GROUP BY or ORDER BY clauses. See *Completing the Group By/Order By Tab* on page 34 for details.

- 4. (Optional) Click **View Full Query** to see the entire SQL query—the composite of the information from each of the tabs.
- 5. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.

### Completing the Select/From Tab

The **Select/From** tab allows you to construct the SQL query the portlet data source executes.

• Select. This statement identifies *one or more columns* to be included in the query.

For example, the following shows a complete SQL query for a portlet data source (the SELECT statement portion of the SQL query is shown in italics):

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

• From. This clause selects the *table* that the columns are selected from.

For example, the following shows a complete SQL query for a portlet data source (the FROM clause portion of the SQL query is shown in italics):

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

Figure 2-3. Select/From tab of the Query Definition window

M Query Definition			E	
Select/From Where/Filter Select You can use any Datab the FROM portion direct	ase columns or SQL ex	xpression to creat	e columns for the SELECT portion of the query and enter	
RISK_COUNT_HYP RISK_COUNT SCOPE_CHANGE SCOPE_CHANGE PROGRAM_STATE ISSUE_COUNT PROGRAM_NAME RELATIVE_PRIORITY PROGRAM_MANAG ISSUE_SUMMARY ISSUE_COUNT_HY PROGRAM_ID	Text Summary Condition/ Text Text Text Number Text Summary Condition/ Text Number	Description	SQL decode(show_risks_flag,Y',risk_summary,null) decode(show_risks_flag,Y',decode(max(risk_count)) decode(show_scope_changes_flag,Y',scope_chan decode(show_scope_changes_flag,Y',decode(max( decode(show_scope_changes_flag,Y',max(scope) program_state_meaning decode(show_issues_flag,Y',max(issue_count),null) program_name relative_priority program_manager_full_name    ''   program_mana decode(show_issues_flag,Y',issue_summary,null) decode(show_issues_flag,Y',issue_summary,null) decode(show_issues_flag,Y',issue_summary,null) decode(show_issues_flag,Y',issue_summary,null) program_manager_full_name	
PROGRAM_MANAG PROGRAM_NAME H			program_manager_full_name p.program_id	
Add     Edit     Remove       From Clause:     FROM kpmo_program_list_v p, kpmo_programs_v pv     Image: Clause:				
Where/Group By/Having/Ord	Enlarge Where/Group By/Having/Order By Clauses:			
resource_request_summary, show_issues_flag, show_risks_flag, show_scope_changes_flag				
View Full Query			OK Apply Cancel	
Ready				

To complete (or update) the **Select** section on the **Select/From** tab in the Query Definition window:

- 1. (Optional) To change the settings for any existing column:
  - a. Select a column.
  - b. Click **Edit** in the **Select** section.

The Data Source Column. < Column Name> windows opens.

- c. The information that should be provided depends on the Column Type. See *Supplemental Details for the Data Source Column Window* on page 43 for the details associated with each column type.
- d. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.
- 2. (Optional) To include a new column.
  - a. Click Add in the Select section.

The Data Source Column: New window opens.

- b. The information that should be provided depends on the Column Type. See Supplemental Details for the Data Source Column Window on page 43 for the details associated with each column type.
- c. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.
- 3. Repeat step 1 and step 2 until all the desired columns are included.
- 4. In the **From Clause** section of the **Select/From** tab of the Query Definition window, complete the associated clause.

This is a free-form SQL entry area.



Click Enlarge to create a larger text entry field.

5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

### Completing the Where/Filter Tab

The **Where/Filter** tab allows you to construct the SQL query the portlet data source executes.

• Where. This clause is used to specify the selection criteria.

For example, the following shows a complete SQL query for a portlet data source (the WHERE clause portion of the SQL query is shown in italics):

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

• Filter. This clause is used to specify the filter fields that appear on the portlet's edit page.

Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a Dashboard user.

Note

Filter field values can be used in the SQL by using the token name P.TOKEN\_NAME or VP.TOKEN NAME.

Figure 2-4. Where/Filter tab of the Query Definition window

SelectFrom Where/Filter Group By/Order By   Please use this tab to define your WHERE clause and the Filter Fields that users will use to filter their portlets. SelectFrom Clauses: [RAM_[D='   p.program_id),null) ISSUE_COUNT_HYPERLINK, p.program_id PROGRAM_ID, program_manager_ull_name PROGRAM_MANAGER_FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK FROM kpmo_program_list_v p, kpmo_programs_v pv Where Clause [VMHERE 1=1 AND p.program_id = pv.program_id AND (select KPMO_SECURITY.Can_User_Access_Program((SYS.USER_ID), pv.program_id) from dual)= Y'  Enlarge Filter Fields Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Field has a value. Prompt Created By: Created By: AND trunc(creation_date) == trunc(TO_DATE(P_CREATION Creation_Date From: AND trunc(creation_date) == trunc(TO_DATE(P_CREATION Creation_Date To: AND trunc(creation_date)	A Query Definition	X	
Please use this tab to define your WHERE clause and the Filter Fields that users will use to filter their portlets. SelectFrom Clauses: RAM_[D='   p.program_id),null) ISSUE_COUNT_HYPERLINK, p.program_id PROGRAM_ID, program_manager_filt_name PROGRAM_MANAGER_FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK FROM kpmo_program_list_v p, kpmo_programs_v pv Where Clause: WHERE 1=1 AND p.program_id = pv.program_id AND (select KPMO_SECURITY.Can_User_Access_Program([SYS USER_ID], pv.program_id) from dual)= Y' Enlarge Filter Fields Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Fields as a value. Prompt Created by: Creation Date From: AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION Creation Date To: Program Name: Relative Priority To: Relative Priority From: AND program_id in ((P.PROGRAM_INAME)) Program State: Program State: Program State: AND program_state_code in ((P.PROGRAM_INAME)) Program State: AND progra	Select/From Where/Filter Group By/Order By		
SelectFrom Clauses:          RAM_DD='   p.program_id),null) ISSUE_COUNT_HYPERLINK, p.program_id PROGRAM_ID,         program_manager_full_name PROGRAM_MANAGER_FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK         FROM kpmo_program_list_v p, kpmo_programs_v pv         Where Clauses         WHERE 1=1         AND p.program_id = pv.program_id         AND (select KPMO_SECURITY.Can_User_Access_Program(ISYS.USER_ID), pv.program_id) from dual)= Y'         Enlarge         Filter Fields         Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE         clause if the Filter Field has a value.         Prompt       Where Term         Created By:       AND created_by IN (IP.CREATED_BY)         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION         Program State:       AND program_state         Program State:       AND program_state         Program State:       AND program_state         Program State:       AND program_state         Program Manager:       AND EXISTS (SELECT X'_FROM pm_program_solets pp         Business Objectives:       AND EXISTS (SELECT X'_FROM pm_program_sol			
program_manager_tull_name PROGRAM_MANAGER_FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK FROM kpmo_program_list_v p, kpmo_programs_v pv Where Clause: WHERE 1=1 AND p.program_id = pv.program_id AND (select KPMO_SECURITY.Can_User_Access_Program((SYS.USER_ID), pv.program_id) from dual)= Y'  Filter Fields Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Field has a value. Prompt Creation Date From: AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION Program Name: AND p. program_id IN (IP.PROGRAM_NAME)) Relative Priority From: AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION Program Name: AND p. program_id IN (IP.PROGRAM_NAME)) Relative Priority From: AND relative_priority >= [P.RELATIVE_PRIORITY_FROM] Program State: AND program_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager: AND program_State: AND program_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager: AND program_State: AND program_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager: AND EXIST(SELECT Y_FROM pm_program_business_o New Edt Remove Group By/Having/Order By Clauses: show_issues_flag,			
program_manager_tull_name PROGRAM_MANAGER_FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK FROM kpmo_program_list_v p, kpmo_programs_v pv Where Clause: WHERE 1=1 AND p.program_id = pv.program_id AND (select KPMO_SECURITY.Can_User_Access_Program((SYS.USER_ID), pv.program_id) from dual)= Y'  Filter Fields Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Field has a value. Prompt Creation Date From: AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION Program Name: AND p. program_id IN (IP.PROGRAM_NAME)) Relative Priority From: AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION Program Name: AND p. program_id IN (IP.PROGRAM_NAME)) Relative Priority From: AND relative_priority >= [P.RELATIVE_PRIORITY_FROM] Program State: AND program_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager: AND program_State: AND program_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager: AND program_State: AND program_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager: AND EXIST(SELECT Y_FROM pm_program_business_o New Edt Remove Group By/Having/Order By Clauses: show_issues_flag,			
WHERE 1=1 AND p.program_id = pv.program_id AND (select KPMO_SECURITY.Can_User_Access_Program([SYS.USER_ID], pv.program_id) from dual)= Y'         Enlarge         Filter Fields         Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Field has a value.         Prompt       Where Term         Created By:       AND created_by IN (IP.CREATED_BY))         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION         Program Name:       AND p. program_id IN (IP.PROGRAM_NAME))         Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]	program_manager_full_name PROGRAM_MANAGER_I	FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK 🛛 🥃	
AND p.program_id = pv.program_id AND (select KPMO_SECURITY.Can_User_Access_Program((SYS.USER_ID), pv.program_id) from dual)= Y' Enlarge Filter Fields Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Field has a value. Prompt Created By: AND created_by IN (IP.CREATED_BY)) Creation Date From: AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION Creation Date From: AND trunc(creation_date) >= trunc(TO_DATE(IP.CREATION Program Name: AND p. program_id IN (IP.PROGRAM_NAME)) Relative Priority To: AND trunc(creation_date) <= trunc(TO_DATE(IP.CREATION Program State: AND relative_priority >= [P.RELATIVE_PRIORITY_TO] Relative Priority To: AND relative_priority >= [P.RELATIVE_PRIORITY_FROM] Program State: AND program_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager. AND relative_priority >= [P.RELATIVE_PRIORITY_FROM] Program Manager. AND relative_state_code IN (IP.PROGRAM_STATE.TO_ST Program Manager. AND EXISTS (SELECT Y FROM pm_program_business_o New Edt Remove Group By/Having/Order By Clauses: show_issues_flag, show_scope_changes_flag View Full Query OK Apply Cancel	Where Clause:		
Filter Fields         Define the Filter Field has a value.         Prompt       Where Term         Created By:       AND created by IN ((P.CREATED_BY))         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE((P.CREATION)         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE((P.CREATION)         Program Name:       AND p. program_idl N((P.ROGRAM_NAME))         Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]	AND p.program_id = pv.program_id		
Filter Fields         Define the Filter Field has a value.         Prompt       Where Term         Created By:       AND created by IN ((P.CREATED_BY))         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE((P.CREATION)         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE((P.CREATION)         Program Name:       AND p. program_idl N((P.ROGRAM_NAME))         Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]		Enlarge	
Define the Filter Fields that will be available to the Portlet Definition. The Where Term will be appended to the WHERE clause if the Filter Field has a value.         Prompt       Where Term         Created By:       AND created_by IN ((P.CREATED_BY))         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE((P.CREATION)         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE((P.CREATION)         Program Name:       AND p. program_idl N((P.PROGRAM_NAME))         Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]	L		
clause if the Filter Field has a value.         Prompt       Where Term         Created By:       AND created_by IN ([P.CREATED_BY])         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION         Program Name:       AND p. program_id IN ([P.PROGRAM_NAME])         Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]	Filter Fields	1	
clause if the Filter Field has a value.         Prompt       Where Term         Created By:       AND created_by IN ([P.CREATED_BY])         Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION         Program Name:       AND p. program_id IN ([P.PROGRAM_NAME])         Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]	Define the Filter Fields that will be available to the Portle	et Definition. The Where Term will be appended to the WHERE	
Created By:       AND created_by IN ([P.CREATED_BY])         Creation Date From:       AND trunc(creation_ate) = trunc(TO_DATE([P.CREATION])         Creation Date To:       AND trunc(creation_ate) = trunc(TO_DATE([P.CREATION]))         Program Name:       AND p. program_id IN ([P.PROGRAM_NAME])         Relative Priority To:       AND relative_priority = [P.RELATIVE_PRIORITY_TO]         Relative Priority From:       AND relative_priority = [P.RELATIVE_PRIORITY_FROM]         Program State:       AND program_state_code IN ([P.PROGRAM_STATE.TO_ST]         Program Manager:       AND program_state_code IN ([P.PROGRAM_STATE.TO_ST]         Program Manager:       AND program_state_code IN ([P.PROGRAM_STATE.TO_ST]         Business Objectives:       AND EXISTS(SELECT Y' FROM pm_program_projects pp]         Business Objectives:       AND EXISTS (SELECT Y' FROM pm_program_business_o]         Group By/Having/Order By Clauses:       Show_issues_flag,         show_issues_flag,       Show_scope_changes_flag         View Full Query       OK       Apply			
Created By:       AND created_by IN ([P.CREATED_BY])         Creation Date From:       AND trunc(creation_ate) = trunc(TO_DATE([P.CREATION])         Creation Date To:       AND trunc(creation_ate) = trunc(TO_DATE([P.CREATION]))         Program Name:       AND p. program_id IN ([P.PROGRAM_NAME])         Relative Priority To:       AND relative_priority = [P.RELATIVE_PRIORITY_TO]         Relative Priority From:       AND relative_priority = [P.RELATIVE_PRIORITY_FROM]         Program State:       AND program_state_code IN ([P.PROGRAM_STATE.TO_ST]         Program Manager:       AND program_state_code IN ([P.PROGRAM_STATE.TO_ST]         Program Manager:       AND program_state_code IN ([P.PROGRAM_STATE.TO_ST]         Business Objectives:       AND EXISTS(SELECT Y' FROM pm_program_projects pp]         Business Objectives:       AND EXISTS (SELECT Y' FROM pm_program_business_o]         Group By/Having/Order By Clauses:       Show_issues_flag,         show_issues_flag,       Show_scope_changes_flag         View Full Query       OK       Apply	Prompt	Where Term	
Creation Date From:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION]         Creation Date To:       AND trunc(creation_date) >= trunc(TO_DATE([P.CREATION]         Program Name:       AND p. program_id IN ([P.PROGRAM_NAME])         Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]			
Creation Date To:       AND trunc(creation_date) <= trunc(TO_DATE([P.CREATION]			
Program Name:       AND p. program_id IN ((P.PROGRAM_NAME))         Relative Priority To:       AND relative_priority ~= [P.RELATIVE_PRIORITY_TO]         Relative Priority From:       AND prelative_priority ~= [P.RELATIVE_PRIORITY_FOM]         Program State:       AND program_state_code IN ((P.PROGRAM_STATE.TO_ST)         Program Manager:       AND program_state_code IN ((P.PROGRAM_STATE.TO_ST)         Program Manager:       AND exists (select user_id from kinta_users)         Contains Projects:       AND EXISTS(SELECT Y' FROM pm_program_projects pp)         Business Objectives:       AND EXISTS (SELECT Y' FROM pm_program_business_o)         Rew       Edt         Group By/Having/Order By Clauses:       show_issues_flag,         show_issues_flag,       w         View Full Query       OK			
Relative Priority To:       AND relative_priority <= [P.RELATIVE_PRIORITY_TO]			
Relative Priority From:       AND relative_priority >= [P.RELATIVE_PRIORITY_FROM]         Program State:       AND program_state_code [N ([P.PROGRAM_STATE:TO_ST)         Program Manager:       AND exists (select user_id         Contains Projects:       AND EXISTS (SELECT x FROM pm_program_pojects pp)         Business Objectives:       AND EXISTS (SELECT x' FROM pm_program_business_o)         Rew       Edit         Remove       Show_risks_flag,         show_risks_flag,       Show_scope_changes_flag         View Full Query       OK       Apply			
Program State:       AND program_state_code IN (IP.PROGRAM_STATE.TO_ST         Program Manager:       AND exists (select user_id from knta_users         Contains Projects:       AND EXISTS (SELECT X' FROM pm_program_projects pp         Business Objectives:       AND EXISTS (SELECT X' FROM pm_program_business_o         New       Edt Remove         Group By/Having/Order By Clauses:       show_issues_flag, show_issues_flag,         Show_scope_changes_flag       View Full Query         OK       Apply	Relative Priority From:		
Contains Projects:       AND EXISTS(SELECT X FROM pm_program_projects pp         Business Objectives:       AND EXISTS (SELECT X FROM pm_program_business_o         Remove       New Edit Remove         Group By/Having/Order By Clauses:       show_issues_flag,         show_issues_flag,          show_scope_changes_flag       View Full Query         OK       Apply	Program State:		
Contains Projects:       AND EXISTS(SELECT X FROM pm_program_projects pp         Business Objectives:       AND EXISTS (SELECT X FROM pm_program_business_o         New       Edt         Remove       Show_risks_flag,         show_risks_flag,       Show_scope_changes_flag         View Full Query       OK			
Business Objectives:       AND EXISTS (SELECT X' FROM pm_program_business_o)         New       Edit         Group By/Having/Order By Clauses:         show_issues_flag,         show_issues_flag,         show_scope_changes_flag         View Full Query         OK       Apply			
Group By/Having/Order By Clauses: show_issues_flag, show_risks_flag, show_scope_changes_flag View Full Query OK Apply Cancel			
Group By/Having/Order By Clauses: show_issues_flag, show_risks_flag, show_scope_changes_flag View Full Query OK Apply Cancel	New	Edit Remove	
show_issues_flag, show_risks_flag, show_scope_changes_flag View Full Query OK Apply Cancel			
show_risks_flag, show_scope_changes_flag View Full Query OK Apply Cancel	Group By/Having/Order By Clauses:		
show_risks_flag, show_scope_changes_flag View Full Query OK Apply Cancel	show_issues_flag,	~	
show_scope_changes_flag View Full Query OK Apply Cancel			
		×	
Ready	View Full Query	OK Apply Cancel	
	Ready		

To complete (or update) the **Where Clause** section on the **Where/Filter** tab in the Query Definition window:

1. Complete the associated clause.

The Where Clause section defines the WHERE clause of the portlet query.

This is a free-form SQL entry area.



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

- 2. (Optional) To change the settings for an existing filter field:
  - a. Select a filter field.
  - b. Click Edit in the Filter Fields section.

The Filter: <*Filter Field*> window opens.

- c. Provide the data as detailed in *Completing the Filter Fields Tab* on page 36.
- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.
- 3. To include a new filter field:
  - a. Click New in the Filter Fields section.

The Filter: New window opens.

Adding filter fields here has the same results as adding filter fields using the **Filter Fields** tab as the Data Source : *<Data Source Name>* window.

The differences in the two areas is how the information is visually displayed.

- In the Filter Fields section of the Query Definition window, the SQL clauses are displayed.
- On the Filter Fields tab of the Data Source : < Data Source Name> window, the Mercury IT Governance Center entities are displayed.
- b. Provide the data as detailed in *Completing the Filter Fields Tab* on page 36.
- c. Click Add to commit any interim changes. Click OK to save your changes and close the window.
- 4. Repeat step 2 and step 3 until all the desired filter fields are included.
- 5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

### Completing the Group By/Order By Tab

The **Group By/Order By** tab allows you to refine the SQL query the portlet data source executes.

- GROUP BY. Adds a keyword to aggregate the result.
- **ORDER BY.** Adds a keyword to sort the result.

For example, the following shows a complete SQL query for a portlet data source (the ORDER BY portion of the SQL query is shown in italics):

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



Figure 2-5. Group By/Order By tab of the Query Definition window

M Query Definition	X
Select/From Where/Fitter Group By/Order By	
Please define your GROUP BY, HAVING, ORDER BY clauses here.	
Select/From/Where Clauses:	
ID='   p.program_id),null) RISK_COUNT_HYPERLINK, decode(show_risks_flag,'Y',max(risk_count),null) RISK_COUNT, decode(show_scope_changes_flag, Y',scope_change_summary,null) SCOPE_CHANGE_SUMMARY, decode(show_scope_changes_flag, Y', decode(max(scope_change_count), 0,null,'if/gwteb/knta/pmo/ProgramScope ChangeListPage.jsp?PROGRAM_ID='   p.program_id),null) SCOPE_CHANGE_COUNT_HYPERLINK, decode(show_scope_changes_flag, Y', max(scope_change_count), 0,null,'if/gwteb/knta/pmo/ProgramScope ChangeListPage.jsp?PROGRAM_ID='   p.program_id),null) SCOPE_CHANGE_COUNT_HYPERLINK, decode(show_scope_changes_flag, Y', max(scope_change_count), null) SCOPE_CHANGE_COUNT, program_state_meaning PROGRAM_STATE_MEANING, decode(show_issues_flag, Y',max(issue_count), null) ISSUE_COUNT, program_name PROGRAM_INAME, relative_priority RELATIVE_PRORITY, program_manager_full_name    ''   program_manager_email_address    ''   program_manager_phone_number PROGRAM_MANAGER_INFO, decode(show_issue_sflag, Y',issue_summary, null) ISSUE_SUMMARY, decode(show_issues_flag, Y', decode(max(issue_count), 0, null, %Itg/web/knta/pmo/ProgramIssueListPage.jsp?PROG RAM_ID='   p.program_id), null ISSUE_COUNT_HYPERLINK, p.program_id PROGRAM_IO, program_manager_full_name PROGRAM_MANAGE_FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK FROM kpmo_program_list_v p, kpmo_programs_v pv WHERE 1=1 AND p.program_id = pv.program_id AND (select KPMO_SECURITY_Can_User_Access_Program(ISYS.USER_ID), pv.program_id) from dual)= Y'	
Group By Clause:	-
resource_request_summary,	
show_issues_flag,	
show_risks_flag, show scope changes flag	
Having Clause:	
Default Order By Clause:	-
View Full Query OK Apply Cancel	
Ready	_

To complete (or update) the **Group By/Order By** tab in the Query Definition window:

1. In the **Group By Clause** section, provide the GROUP BY or ORDER BY terms.

This is a free-form SQL entry area.

2. In the Having Clause section, provide the HAVING terms.

This is a free-form SQL entry area.

3. In the **Default Order By Clause** section, provide the default ORDER BY terms.

This is a free-form SQL entry area.

4. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

### **Completing the Filter Fields Tab**

M Data Source : Program List		
Data Source Name: Program List	Tim	e-out Use Default 🛛 🕜 20 Seconds
Description: Displays the p	rograms and their summary	conditions
Enabled: 💿 Yes	⊖ No	
Data Source Filter Fields Portle	t Definitions Ownership	
Seq Name	Token	Validation
1 Created By:	CREATED_BY	KNTA - User Id - Enabled
2 Creation Date From:	CREATION_DATE_FROM	Date
3 Creation Date To:	CREATION_DATE_TO	Date
4 Program Name:	PROGRAM_NAME	PMO - Programs
5 Relative Priority To:	RELATIVE_PRIORITY_TO	Numeric Text Field (Positive)
6 Relative Priority From:	RELATIVE_PRIORITY_FR	Numeric Text Field (Positive)
7 Program State:	PROGRAM_STATE	PMO - Program State AC
8 Program Manager:	PROGRAM_MANAGER	KNTA - User Names - Enabled
9 Contains Projects:	CONTAINS_PROJECTS	(****Deprecated 7.0***) DRV - Master Projects - E
10 Business Objectives:	BUSINESS_OBJECTIVES	PMO - Business Objectives
<		>
	New View	Remove
Verify		OK Save Cancel
Ready		

Figure 2-6. Filter Fields tab for portlet data source

To complete (or update) the Filter Fields tab in the Data Source : *<Data Source Name>* window:

- 1. (Optional) To change the settings for an existing filter field:
  - a. Select a filter field.
  - b. Click  $\ensuremath{\mathsf{Edit}}$  .

The Filter: <*Filter Field*> window opens.

M Filter: New				
Field Name:	Token:			
	Description:			
Validation	Component Type:	None		$\mathbf{v}$
Validation New Open	Multiselect:	⊖ Yes	() No	
New Open	Required	⊖ Yes	<ul> <li>No</li> </ul>	
	Enabled:	<ul> <li>Yes</li> </ul>	◯ No	
When this filter field has a value, append to Wh	ere Clause:			
View Full Query			OK Add Canc	el
Ready				_

c. Provide the filter criteria using the information from the following table.



Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a Dashboard user.

Filter field values can be used in the SQL by using the token name P.TOKEN\_NAME or VP.TOKEN NAME.

Field Name (*Required)	Description
*Field Name	Specify a name for the filter field that should be shown in the portlet's edit page.
	Type any alphanumeric string.
*Token	Specify the token for the filter field.
Description	Specify a description for the filter field.
	Type any alphanumeric string.
	Select the validation for the filter field.
*Validation	Choices are limited to those validations available on your Mercury IT Governance Center instance.
Default Value	The default value for the filter field, determined by its validation.
Multiselect	Indicate whether or not the filter field is enabled for multi-select.
Required	Indicate whether or not the filter field is required on the portlet's edit page.
Display Only	Indicates whether the filter field can be updated.
Enabled	Indicates whether or not the filter field is enabled.
*When this filter has a value, append to Where Clause	Provide the AND clause that is appended to the portlet's WHERE clause if you enter a value in this filter field.

- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.
- 2. (Optional) To include a new filter field:
  - a. Click New.

The Filter: New window opens.

- b. Provide the filter criteria using the information from the previous table.
- c. Click **Add** to commit any interim changes. Click **OK** to save your changes and close the window.

- 3. Repeat step 1 and step 2 until all the desired filter fields are included.
- 4. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

### **Completing the Ownership Tab**

Only members of the security groups specified in the Ownership window can edit, copy, or disable a specific portlet. If a security group is disabled or the System: Edit Portlet Definition access grant is removed, that group no longer has access to the portlet.

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



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

ata Source Name: Program Lis	st	Time-out Use Defa	ult	20	Seconds
Description: Displays the	e programs and thei	r summary conditions			
Enabled: 💿 Yes					
Data Source   Filter Fields   Por sive ability to edit this Data Source All users with the Edit Portlet	ce to :				
	have the Edit Portle	t Definition Access Grant			
Security Group		Description			
	Add	Remove			

Figure 2-7. Ownership tab for the portlet data source

To complete (or update) the **Ownership** tab in the Data Source : *<Data Source Name>* window:

- 1. Indicate whether to allow changes to the portlet data source to be made by:
  - All users with the System: Edit Portlet Definition access grant
  - Only groups listed below that have the System: Edit Portlet Definition access grant

Use the Add and Remove buttons the refine the list of allowed users.

2. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

## **Copying Portlet Data Sources**

To create a new portlet data source using an existing portlet data source as the basis:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Open Workbench.

The Workbench opens.

3. From the shortcut bar, select Dashboard > Data Sources.

The Data Source Workbench opens.

	a Source Workbench		
Query	Query: None		~
ð	Data Source Name:	Enabled: ALL	×
ults			
Results			
	New Data Source	Max Rows 200 Save Query Clear	List
	Ready		

4. Search for and select a portlet data source (see *Searching For and Viewing Existing Portlet Data Sources* on page 22).

5. Click Copy.

The Copy Data Source window opens.

M Copy Data Source	×
Please enter the information for the copy of D List". Data Source Name	ata Source "Program
Ready	Copy Cancel

- 6. In the **Data Source Name** field, specify a unique name for the portlet data source.
- 7. Click Copy.

The Question window opens.

M Que	estion	×
٩	Would you like to edit Data Source Sample Data Source?	
	Yes No	

- 8. Click **Yes** if you would like to edit the portlet data source. Otherwise, click **No**.
- (Optional) If you clicked Yes in the previous step, modify the portlet data source using the information described in *Creating or Modifying Portlet Data Sources* on page 24.

## **Deleting Portlet Data Sources**

To delete an existing portlet data source:

Note

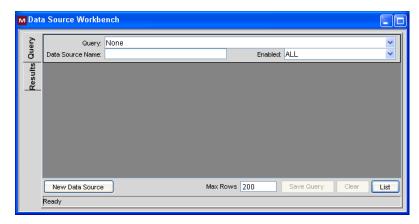
Mercury-supplied portlet data sources cannot be deleted.

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Open Workbench.

The Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.



- 4. Search for and select one or more portlet data sources (see *Searching For and Viewing Existing Portlet Data Sources* on page 22).
- 5. Click Delete.

The Question window opens.

M Question	
Delete 1 Data Source[s]?	
Yes No	

6. Click **Yes** to remove the portlet data source(s). Otherwise, click **No.** 

If you clicked **Yes**, the Data Source Workbench is updated (and the deleted portlet data source no longer appears in the list).

# **Viewing Portlet Definition Usage**

The **Portlet Definitions** tab allows you to view all of the portlet definitions currently linked to the portlet data source.

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

• View all of the portlet definitions linked to the portlet data source.

Remember that portlet definitions and portlet data sources have the following relationships:

- □ A portlet definition can be linked to only one portlet data source.
- □ A portlet data source can be linked to multiple portlet definitions.
- Open the portlet definition by clicking on the portlet definition name. This
  opens the Portlet Definition wizard. The Portlet Definition wizard is
  populated with the information for the selected portlet definition.
- Create a new portlet definition by clicking New Portlet Definition. This opens the Portlet Definition wizard.

Figure 2-8. Portlet Data Source window, Portlet Definitions tab

M Data Source : F	rogram List					
Data Source Name:	Program List		Time-out Use Defau	it 🔽	20	Seconds
Description:	Displays the pro	ograms and their sur	nmary conditions			
Enabled:	Yes	⊖ No				
Data Source   Filte	r Fields Portlet	Definitions Owners	hip			
This Portlet Data Sc	ource is currently	used by the following	g Portlet Definitions:			
Portlet Definition	<u>n Description</u>					
Program List	Displays the p	rograms and their s	ummary conditions.			
New Portlet Defi	nition					
Verify				ОК	Save	Cancel
Ready						

## **Supplemental Details for the Data Source Column Window**

Adding columns to the Query Definition window relies on the Data Source Column window. The fields of the Data Source Column window vary, depending on the column type selected.

See the associated details for the following column types:

- Text, Date, Number, or Summary Condition/Exception, see *Text-Based Column Types Details* on page 43
- Hyperlink, see Hyperlink Column Type Details on page 44
- Currency, see *Currency Column Type Details* on page 45

### **Text–Based Column Types Details**

Figure 2-9. Text-based column types in Data Source Column window

M Data So	urce Column: New 🛛 🛛 🛛 🛛
Column Name:	
Column Type:	Text 🗸
Description:	
Column:	
View Full G	auery OK Save Cancel
Ready	

Table 2-2. Text-based column types field descriptions

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select one of the following: • Text • Date • Number • Summary Condition/Exception
Description	Specify a brief description of the column. Type any alphanumeric string.
*Column	Specify the database column name used for the column. Choices are limited to the column names available on your Mercury IT Governance Center instance.

### **Hyperlink Column Type Details**

Figure 2-10. Hyperlink column type in the Data Source Column window

M Data Sour	rce Column: New
Column Name:	
Column Type:	Hyperlink 💌
Description:	
Hyperlink Type:	Request Detail Page
Entity ID Column:	
Hyperlink:	[DSH.PRT.ENTITY_ID]
View Full Qu	Jery OK Save Cancel
Ready	

Table 2-3. Hyperlink column type field description (page 1 of 2)

Field Name (*Required)	Description
*Column Name	Specify the name of the column.
	Type any alphanumeric string.
*Column Type	Select Hyperlink.
Description	Specify a brief description of the column.
Description	Type any alphanumeric string.
	Select the type of hyperlink to create from this column. Choices include: Request Detail Page Package Detail Page Task Detail Page Project Detail Page Project Overview Page
*Hyperlink Type	<ul> <li>Custom Hyperlink</li> </ul>
	When <b>Custom Hyperlink</b> is selected, the <b>Hyperlink</b> field becomes editable and required.
	Otherwise, the <b>Hyperlink</b> field is read-only and displays a preview of the link is created (for example, /itg/crt/
	RequestDetail.jsp?REQUEST_ID= [PRT.ENTITY_ID]).

Field Name (*Required)	Description
	Specify the SQL expression used to make a column in the final query.
*Entity ID Column	This column should contain values which are Request IDs (such as, Request Detail Page type Hyperlinks).
	In the case of the <b>Custom Hyperlink</b> , the values from this column are used to resolve the token PRT.ENTITY_ID, which can be used in the text of the hyperlink.
	Specify the actual hyperlink text, which should be of one of the following forms:
	<pre><itg_home>/some/page</itg_home></pre>
*Hyperlink	http://machine.server.com/page.html
	The valid tokens are DSH.PRT.ENTITY_ID, DSH.PRT.ENTITY_ID.TO_URL, and SYS.USERNAME.

Table 2-3. Hyperlink column type field description (page 2 of 2)

### **Currency Column Type Details**

M Data Source	Column: New 🛛
Column Name:	
Column Type:	Currency
Description:	
Base Value Column:	
Currency ID Column:	
Local Value Column:	
View Full Query	OK Save Cancel
Ready	

Figure 2-11. Currency column type in the Data Source Co	alumn window
Figure 2-11. Currency column type in the Data Source Co	

 Table 2-4. Currency column type field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select Currency.
Description	Specify a brief description of the column. Type any alphanumeric string.

Field Name (*Required)	Description
*Base Value Column	Specify the column whose values are costs in the base currency that appears for the currency column.
Dase value Column	These values are displayed if the user has configured their Dashboard to show costs in the system's base currency.
	Specify the column whose values are the ID of the local currency.
Currency ID Column	This value is never displayed; however, it is used to determine how the local currency value (see <i>Local Value Column</i> ) is formatted.
	Specify the column whose values are costs in the local currency that appears for the currency column.
Local Value Column	These values are displayed (and formatted appropriately for the selected currency) if the user configured their Dashboard to show costs in the local currency.

## Chapter



# Creating and Maintaining Portlet Definitions

#### In This Chapter:

- Overview of Portlet Definitions
  - Mercury-Supplied Portlet Definitions
  - Mercury-Imported Portlet Definitions
  - □ Imported Java and WSRP Portlet Definitions
  - **Standard Portlet Definitions**
- Searching for Existing Portlet Definitions
- Creating New Portlet Definitions
- Copying Portlet Definitions
- Modifying Portlet Definitions
- Deleting Portlet Definitions
- Importing Java Portlet Definitions
- Importing WSRP Portlet Definitions
- Migrating Portlet Definitions
- Defining a Drilldown Page
  - □ Usage Example
  - Defining a Drilldown Page
  - □ Usage Samples
- Managing Portlet Categories
  - Adding Portlet Categories
  - Deleting Portlet Categories
- Supplemental Details for the Set Up Display Option Step
   List Portlet

- Bar Chart Portlet
- Clustered Bar Chart Portlet
- Stacked Bar Chart Portlet
- Pie Chart Portlet
- Line Chart Portlet
- Bubble Chart Portlet
- Selecting Portlet Colors
  - Defining Color Maps in the Portlet Data Source
  - Specifying the Color Map in the Portlet Definition

## **Overview of Portlet Definitions**

Mercury IT Governance Center portlets include:

• **Builder Portlets.** These are portlets created with the Portlet Definition wizard and Data Source Workbench.

Mercury supplies several builder portlets as part of Mercury IT Governance Center. You can create your own custom builder portlets using the Portlet Definition wizard and Data Source Workbench.

- Java Portlets. These portlets are written in Java and imported into Mercury IT Governance Center using the Portlet Definition wizard. Java portlets consist of a Java portlet definition and the Java code.
- WSRP Portlets. These portlets are defined by a producer Web service and imported into Mercury IT Governance Center using the Portlet Definition wizard. WSRP portlets have a WSRP portlet definition that references the URL of the WSRP portlet. That is, WSRP portlet definitions are a proxy to a remote portlet definition maintained by the producer and accessible through a Web service.

These Mercury IT Governance Center portlets rely on the following types of portlet definitions:

- Mercury-supplied portlet definitions. These portlet definitions are provided by Mercury as part of a Mercury IT Governance Center application.
- Mercury-imported portlet definitions. These portlet definitions are imported by Mercury as part of a Mercury IT Governance Center application.
- Standard portlet definitions. These portlet definitions are created using the Portlet Definition wizard (*Creating New Portlet Definitions* on page 54).
- Java portlet definitions. These portlet definitions are imported using the Import Portlet Definition wizard (see *Importing Java Portlet Definitions* on page 69) and maintained using the Portlet Definition wizard (*Creating New Portlet Definitions* on page 54).
- WSRP portlet definitions. These portlet definitions are imported using the Import Portlet Definition wizard (see *Importing Java Portlet Definitions* on page 69) and maintained using the Portlet Definition wizard (*Creating New Portlet Definitions* on page 54).

### **Mercury-Supplied Portlet Definitions**

Mercury IT Governance Center applications, such as Mercury IT Governance Portfolio Management<sup>TM</sup> and Mercury IT Governance Demand Management<sup>TM</sup>, may include their own portlet definitions.

These Mercury-supplied portlet definitions:

- Cannot be deleted
- Cannot have their displays or preferences changed in any way
- Can be modified by:
  - Copying portlet definitions
  - Changing user and administrator access
  - □ Changing user help (for builder portlets only)

### **Mercury-Imported Portlet Definitions**

Mercury IT Governance Center applications may include their own imported Java or WSRP portlet definitions.

These Mercury-imported portlet definitions:

- Cannot be deleted
- Can be modified by:
  - □ Changing user and administrator access
  - □ Changing general information

### **Imported Java and WSRP Portlet Definitions**

Any Java portlet definitions or WSRP portlet definitions that you have imported using the Import Portlet Definition wizard:

- Can be deleted
- Can be modified by:
  - Configuring user and administrator access
  - □ Changing general information

### **Standard Portlet Definitions**

Any standard portlet definitions that you have created using the Create Portlet Definition wizard:

- Can be deleted
- Can have *any* of their settings changed



These portlet definitions are sometimes termed "builder portlet definitions" since they were *built* using the Create Portlet Definition wizard.

# **Searching for Existing Portlet Definitions**

To search for an existing portlet definition.

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Portlet Definitions > Configure Portlet Definitions.

The Configure Portlet Definitions page appears.

MERCURY		SIGN OUT
	Dashboard - Front Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure	
Welcome, Admin User Sep 29, 2006 02:12:44 AM PDT Last Login: 9/29/06 12:58 AM P Expand All Collapse All	Configure Portlet Definitions	
🗄 Dashboard		
Demand Management	Search for a Portlet Definition to Configure	Reset Form
Project Management	Name starts with: Type:	
🗄 Time Management	Category: Enabled:	
Resource Management	Created By:	
🗄 Program Management		
🗄 Portfolio Management	Sort By: Name V (a) Ascending (Results Displayed Per Page: 50	
🗉 Financial Management	Obescending	
Deployment Management		Search
Reports		Search
Administration		
Open Workbench		
Open Workbench on Desktc Edit My Profile		
View My Resource Informal		
Download Microsoft Project		
🗄 Demand Sets & Process		
🕀 Project Types & Templat		
Financials		
🕀 Program Processes		
🕀 Portfolio Management		
🕀 Time Management		
Regions		
Report Execution		
Portlet Definitions		
Configure Portlet Definitic		
Import a Portlet Definition Create a Portlet Definition		
Modules		
Product Information		

### 3. Provide the search criteria using the information from the following table.

Field Name (*Required)	Description
Name	Specify the name of the portlet. Type any alphanumeric string (up to 255 characters in length).

Field Name (*Required)	Description
Туре	Select the type of portlet definition. Choices include: List Bar Chart Clustered Bar Chart Stacked Bar Chart Pie Chart Line Chart Bubble Chart Java WSRP
Category	Select one or more categories. Choices are limited to the categories available on your Mercury IT Governance Center instance.
Enabled	Indicated whether or not the portlet definition is enabled.
Created By	Select the user who created the module.
Sort By	Select the sort criteria. Choices include: Name Type Category Enabled
Ascending/Descending	Indicate the sorting sequence.
*Results Displayed Per Page	Specify the maximum number of search results to display on a page. Type any positive integer.



Click **Reset Form** if you would like to clear your current search criteria.

### 4. Click Search.

The Configure Portlet Definitions page is updated to include the search results which are displayed in the **Configure Portlet Definitions** section.

MERCURY					SIGN OUT
	Dashboard - Front F	age > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search	Results		
Welcome, Admin User Sep 29, 2006 02:13:52 AM PDT Last Login: 9/29/06 12:58 AM P	Configure Po	tlet Definitions			
Expand All Collapse All					
Dashboard					
Demand Management	Configure Port	et Definitions Showing	1 to 11 of	11 Prev	Nest
	Name ∠	Description	Туре	Category	Enable
Project Management	TMG - Actuals for Direct Reports	Shows the total time entered by all the direct reports for a specific manager or set of managers	List	Time Management	Yes
Resource Management	TMG - Delinquent Time Sheets	Shows Resources who have not submitted their Time Sheets for a given period.	Java	Time Management	Yes
9 Program Management	TMG - My Time Sheets	Displays the Time Sheets for the user during the last 10 time periods.	Java	Time Management	Yes
Portfolio Management	TMG - My Work	Displays all the Work Items on open Time Sheets for the user. This portlet gives	List	Time	Yes
Einancial Management	Items	the user a quick snapshot on what he or she has been working on and is currently charging time to.		Management	
Deployment Management	TMG - Resource Group Total by Work Item	Displays the time charged by Resource Groups, summarizing the totals of all the Resources in those groups, by splitting the data by each specific Work Item.	List	Time Management	Yes
	V VOLK ROTT	Though less frequently used, is useful when looking at a specific Resource Group.			
Administration	TMG - Resource	Displays the time charged by Resource Groups, summarizing the totals of all the	List	Time	Yes
Open Workbench Open Workbench on Desktc	Group Totals	Resources in those groups, letting you see the level of activity (by time) in the current and previous period for these groups.	List	Management	165
Edit My Profile View My Resource Informal	TMG - Resource Totals	Displays the time charged by a set of resources, letting you see the level of activity (by time) in the current and previous period for these users.	List	Time Management	Yes
Download Microsoft Project Demand Sets & Process	TMG - Time Sheet Approvals	Displays Time Sheets that need approval by the current user.	Java	Time Management	Yes
Project Types & Templat	TMG - Total Hrs by	Displays detail information on the time allocated to and the time charged for	List	Time	Yes
	Work Item	specific Work Items. It shouldn't be used to display information for all Work Items but for a specific set based on filter criteria.		Management	
🕀 Portfolio Management	TMG - Work	Displays summary information on the work allocations defined in the system. It is	List	Time	Yes
🗄 Time Management	Allocation Details	especially helpful to see which allocations are close to being used up or actually		Management	
Regions	THO MAN BAN	are over budget.	1.1.4	Time	
Report Execution     Portlet Definitions     Configure Portlet Definitic	TMG - Work Item Set Budget and Actuals	Displays summary information at the Work Item Set level. This portlet is useful to get a snapshot of which projects or types of activities you are spending the most time on as well as where you have budgeted the most time on.	List	Time Management	Yes
Import a Portlet Definition				_	
Create a Portlet Definition Modules	Search for a Pe	ortlet Definition to Configure			Reset Form
Product Information	Name starts with:	Тм Туре:			
	Category:	Enabled:			
	Created By:	2			
	Sort By: Name	O Ascending     Results Displayed Per Page: 50     Descending			
					Search

From the Configure Portlet Definitions page you can:

- Select a portlet definition by clicking the link associated with the desired portlet definition (in the Configure Portlet Definitions section).
- Refine your search by providing additional search criteria as detailed in step 3 on page 51 (in the Search for a Portlet Definition to Configure section).

# **Creating New Portlet Definitions**

To create an entirely new standard portlet definition, use the Create Portlet Definition wizard.

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Portlet Definitions > Create a Portlet Definition.

The Choose Portlet Type step of the Create Portlet Definition page appears.

MERCURY		SIGN OUT	
	Dashboard - Front Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search Results > Create Portlet D	Definition	
Welcome, Admin User Sep 29, 2006 02:14:21 AM PDT Last Login: 9/29/06 12:58 AM P Expand All Collapse All	Create Portlet Definition		
Dashboard	5. Configure Access     6. Add User Help	Consistence Records     Configure Recor	
Demand Management	o, cumigure access 🕐 o, adu user neip		
🗄 Project Management	Choose Portlet Type		
🗄 Time Management	List     Displays data in rows and columns.		
🗄 Resource Management			
🗄 Program Management	O Bar Chart Displays data in either vertical or horizontal bars.		
🗄 Portfolio Management			
🗄 Financial Management	O Clustered Bar Chart Displays data in either vertical or horizontal bars; bars can be grouped into clusters.		
🗄 Deployment Management			
Reports	Stacked Bar Chart Displays data in either vertical or horizontal bars; each bar can be subdivided into categories.		
Administration			
Open Workbench Open Workbench on Desktc Edit My Profile View My Resource Informat	O Pie Chart Typically used to show percentages of a whole.		
Download Microsoft Project  Demand Sets & Process  Project Types & Templat  Financials	Cline Chart Typically used to show changes in data over time.		
<ul> <li>Program Processes</li> <li>Portfolio Management</li> <li>Time Management</li> </ul>	O Bubble Chart Typically used to plot points on two axes such as "value" vs. "risk." Bubble size and color indicate addidimensions of information.	tional	
Report Execution     Portlet Definitions     Configure Portlet Definition     Import a Portlet Definition     Create a Portlet Definition     Greate a Portlet Definition	Cancel 4 Back Hext >		
Product Information			

3. Select the type of portlet to create.

Portlet Type	Description
List	Data is presented in tabular form using rows and columns.
Bar Chart	Data is displayed as vertical or horizontal bars. Each bar represents a single item.
Clustered Bar Chart	Data is displayed as vertical or horizontal bars. Bars can be grouped into categories.
Stacked Bar Chart	Data is displayed as vertical or horizontal bars. Each bar can be subdivided into categories.

Portlet Type	Description
Pie Chart	Data is displayed as a percentage of a whole.
Line Chart	Data is displayed to show changes over time.
Bubble Chart	Four dimensions of data are displayed on an x-y axis. The x-y axis location pinpoints a spot while the size and color of the bubble indicates additional dimensions of the information.

4. Click Next (found near the bottom of the page).

The Enter Portlet Information step of the Create Portlet Definition (*Portlet Type>*) page appears.

MERCURY			SIGN OUT
	Dashboard - Fron	t Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search Results » Create Portlet De	finition
Welcome, Admin User Sep 29, 2006 02:22:15 AM PDT Last Login: 9/29/06 12:58 AM P	Create Porti	et Definition (List)	
Expand All Collapse All	1. Choose Portlet T	ype  2. Enter Portlet Information 3. Set up Display Options 4. Define Preferences	
🗄 Dashboard	5. Configure Acces	es 🕨 6. Add User Help	
🗄 Demand Management			
🗉 Project Management	Portlet Inform	nation	
⊡ Time Management	L.	Sample	
🗄 Resource Management	Category:	Requests II Manage Categories	
🗄 Program Management	-	Example	
	L	Narrow V	
🗉 Financial Management	Enabled:	Yes ○ No     No	
🗉 Deployment Management	Data Source		
⊞ Reports	*Data Source: F	Resource Assignmer 🧮 New Data Source	
⊡ Administration			
Open Workbench		Cancel ◀ Back Hext ▶	
Open Workbench on Desktc			
Edit My Profile View My Resource Informal			
Download Microsoft Project			
Demand Sets & Process			
🗄 Project Types & Templat			
Program Processes			
Portfolio Management			
🗄 Time Management			
Regions			
Report Execution			
Portlet Definitions			
Configure Portlet Definitic			
Import a Portlet Definition			
Create a Portlet Definition			
Modules			
Product Information			

Field Name (*Required)	Description				
Portlet Information section					
*Name	Specify a unique name for the portlet. Type any alphanumeric string (up to 80 characters in length).				
Category	Select one or more categories. Choices are limited to those categories available on your Mercury IT Governance Center instance.				
Manage Categories	Click to add or delete portlet categories. See <i>Managing Portlet Categories</i> on page 92 for details.				
Description	Specify the portlet definition. Type any alphanumeric string (up to 1,800 characters in length).				
Default Width	<ul> <li>Select the default width of the portlet.</li> <li>Choices include:</li> <li>Narrow</li> <li>Wide</li> <li>Note that the default width can be changed when the portlet is personalized.</li> </ul>				
Enabled	Indicate whether or not the portlet can be added to the Dashboard page. If a portlet is added to a Dashboard, then disabled, the portlet remains on the Dashboard page.				
Data Source section					
*Data Source	Select the data source for the current portlet. The portlet data source defines the columns or chart entity, and preferences fields for a portlet definition.				
New Data Source	Click to open the Workbench and create a new portlet data source.				

5. Provide the portlet details using the information from the following table.

### 6. Click Next.

The Set up Display Options step of the Create Portlet Definition (*Portlet Type>*) page appears.

MERCURY		SIGN OUT					
	Dashboard - Front Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search Resul	ts > Create Portlet Definition					
Welcome, Admin User Sep 29, 2006 02:23:06 AM PDT Last Login: 9/29/06 12:58 AM P	Create Portlet Definition (List)						
Expand All Collapse All	1. Choose Portlet Type 🕨 2. Enter Portlet Information 🕨 3. Set up Display Options 🕨 4. Define Preferences						
🗄 Dashboard	5. Configure Access 🕨 6. Add User Help						
Demand Management							
Project Management	Display Columns						
± Time Management	Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be user's selection.	made optionally available for the					
± Resource Management	Add Column Edit Delete						
🗄 Program Management	Add Lolumn Edit Delete						
🗄 Portfolio Management	Click on a column to select User Sortable						
🗄 Financial Management	Columns Displayed by Default:						
🗄 Deployment Management	A Requests △ OPEN_REQUESTS						
• Reports	Tasks OPEN TASKS						
∃ Administration							
Open Workbench Open Workbench on Desktc	Remaining TASK_TOTAL_RAMAINING_DURATION						
Edit My Profile							
View My Resource Informal Download Microsoft Project	Columns Displayed by Default in Maximized View Only:						
🗄 Demand Sets & Process							
🗄 Project Types & Templat							
🗄 Financials							
🗄 Program Processes	Columns Available for Display:						
🕀 Portfolio Management							
🕀 Time Management	Arrange Data						
Regions	5						
Report Execution	Default Sort By: Requests 💉 🕑 Ascending						
Portlet Definitions Configure Portlet Definitic	O Descending						
Import a Portlet Definition	'Default Rows Displayed: 5 In Normal View						
Create a Portlet Definition							
Modules	50 In Maximized View						
Product Information							
		Haud A					
	Cancel 4 Back	Next 🕨					

7. Provide the appropriate information on the Create Portlet Definition (*<Portlet Type>*) page.

The information needed to create the different portlet types vary significantly. Field descriptions are provided in the *Supplemental Details for the Set Up Display Option Step* section.

- For list portlets, see *List Portlet* on page 94.
- For bar charts, see *Bar Chart Portlet* on page 100.
- For clustered bar charts, see *Clustered Bar Chart Portlet* on page 103.
- For stacked bar charts, see *Stacked Bar Chart Portlet* on page 105.
- For pie charts, see *Pie Chart Portlet* on page 107.
- For line charts, see *Line Chart Portlet* on page 108.
- For bubble charts, see *Bubble Chart Portlet* on page 110.

#### 8. Click Next.

The Define Preferences step of the Create Portlet Definition (*Portlet Type*) page appears.

MERCURY	SIGN OUT
	Dashboard - Front Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search Results > Create Portlet Definition
Welcome, Admin User Sep 29, 2006 02:24:32 AM PDT Last Login: 9/29/06 12:58 AM P	Create Portlet Definition (List)
Expand All Collapse All	1. Choose Portlet Type  2. Enter Portlet Information  3. Set up Display Options  4. Define Preferences
🗄 Dashboard	5. Configure Access 🕨 6. Add User Help
Demand Management	Desferre Free Levent
Project Management	Preference Form Layout
🗉 Time Management	Click and drag to select and move fields
⊕ Resource Management	Drag outside box to cancel movement
🗄 Program Management	Resource:
🗄 Portfolio Management	
	Request Type:
🗄 Deployment Management	Limit by Task State:
Reports	
Administration	Edit
Open Worklench Open Worklench on Deskte Edit My Profile View My Resource Informat Download Microsoft Project Demand Sets & Process Project Types & Templat Financials Program Processes Portfolo Management Regions Regot Execution Portlet Definitions Configure Portlet Definitio Greate a Portlet Definitio Create a Portlet Definitio	Show Preferences summary on this portlet (user can choose to hide #)   Require user to edit preferences before viewing portlet for the first time     Cancel     Hext   Preview   Finish
Product Information	

Initially, all preference fields are mapped from the portlet data source, which indicates the name of the field, type of the field (such as auto-complete or text field), and any default value. Note that preferences requiring default values are shown with a red asterisk.

- 9. (Optional) At any time, you can click **Save** to commit your changes.
- 10. (Optional) To change the width of preferences, click the Sizing icon (←→).
- 11. (Optional) To rearrange preferences:
  - a. Select a preference.
  - b. Drag and drop the preference into the desired location.

- 12. (Optional) To edit preferences
  - a. Select a preference.
  - b. Click Edit.

The Edit Portlet Preference: <*Preference*> dialog box opens.

MERCUR	Ŷ		Close Window
Edit Portle	t Preference: TASK_STATE_ID		
'Field Prompt:	Limit by Task State:		
Component Ty	ype: Multi-Select Auto Complete		
Display:			
	Required and Editable - Require user to enter a value		
	Non-Editable - Only allow user to view		
	Hidden - Not visible to user		
Default Value:			
		Done	Cancel
		Done	Cancer
			Close Window

c. Provide the preference details using the information from the following table.

Field Name (*Required)	Description
*Field Prompt	Specify the prompt that will appear on the Portlet Preference page.
	Type any alphanumeric string (up to 200 characters in length).
	Select the manner in which this preference is displayed.
	Choices could include one or more of the following (depending on the component type):
	• Editable. Allows the user to edit the field.
Display	<ul> <li>Required and Editable. Requires the user to enter a value.</li> </ul>
	<ul> <li>Non-Editable. Allows user to view, but not edit the field.</li> </ul>
	<ul> <li>Hidden. The information is not viewable (or editable) by the user.</li> </ul>
	This field is required if a default value is required by the portlet data source.
Default Value	Specify the default value that is shown when editing the portlet.
	This field is required if a default value is required by the portlet data source.

d. Click Done.

The changes to preference are saved and the Edit Portlet Preference: *<Preference>* dialog box closes.

- 13. (Optional) Select Show Preferences summary on this portlet (user can choose to hide it) if you want the user to have this capability.
- 14. (Optional) Select Require user to edit preferences before viewing portlet for the first time if you want to force the user to edit their preferences.
- 15. Click **Next**. If you do not want to change any of the remaining default values, click **Finish**.

The changes are added to the new portlet definition. The Configure Access step of the Create Portlet Definition (*<Portlet Type>*) page appears.

MERCURY		SIGN OUT
	Dashboard - Front Page > Dashboard - My	Personalized Page > Search for a Portlet Definition to Configure > Search Results > Create Portlet Definition
Welcome, Admin User Sep 29, 2006 02:25:44 AM PDT Last Login: 9/29/06 12:58 AM P	Create Portlet Definition (Lis	st)
Expand All Collapse All	1. Choose Portlet Type 🕨 2. Enter Portlet	Information 🕨 3. Set up Display Options 🕨 4. Define Preferences
🗄 Dashboard	5. Configure Access 🕨 6. Add User H	elp
Demand Management		
🗄 Project Management	Configure Access	
🗄 Time Management	User Access	
🗄 Resource Management	Users specified below will have access to a	
Program Management	Require users to have one of these pri	
Portfolio Management	Allow access to only the following use	
	Security Type Group	Name
Financial Management	Group User	ITG Administrator Larry X. Veach
🗄 Deployment Management	V User	Panela Stewart
Reports	Give Access to: User 🗸	Paneta Scewart
Administration		
Open Workbench Open Workbench on Desktc Edit My Profile	Administrator Access Users specified below will have access to r	nodify this Portlet Definition.
View My Resource Informat	Security Type	Hame
Download Microsoft Project	Group Group	ITG User Admin
Demand Sets & Process	Group Group	ITG Team Manager
Project Types & Templat     Financials	X User	Ron Steel
	Give Access to: User 🖌	Add Add
Portfolio Management		
Time Management	WSRP Access	
<ul> <li>Regions</li> <li>Report Execution</li> <li>Portlet Definitions</li> </ul>	Make Portlet available to WSRP Consume	ях
Configure Portlet Definition Import a Portlet Definition Create a Portlet Definition		Cancel 4 Back Ilext > Preview Finish
Modules		
Product Information		

- 16. (Optional) In the User Access section:
  - a. Select one or more access grants (privileges) a user must have in order to add the portlet to a Dashboard page.
  - b. Select one or more users or security groups allowed to add the portlet to a Dashboard page.

By default, access is given to all users belonging to the ITG User security group.



Whenever there is no specific (individual or group) user access, this setting reverts to its default.

- 17. (Optional) In the Administrator Access section:
  - Select one or more users or security groups allowed to modify the portlet.

By default, access is given to all users belonging to the ITG User Admin security group. 📕 🖬 Tip

Whenever there is no specific (individual or group) administrator access, this setting reverts to its default.

- 18. (Optional) In the **WSRP Access** section:
  - Select whether you want to make the portlet available to WSRP consumers.

Tip

Click **Preview** to review the layout and make sure that you have presented the information as desired.

#### 19. Click Next.

The changes are added to the new portlet definition and the Add User Help step of the Create Portlet Definition (*<Portlet Type>*) page appears.

MERCURY	SIGN OUT				
	Dashboard - Front Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search Results > Create Portlet Definition				
Welcome, Admin User Sep 29, 2006 02:28:40 AM PDT Last Login: 9/29/06 12:58 AM P Expand All_Collapse All	Create Portlet Definition (List) 1. Choose Portlet Type  2. Enter Portlet Information 3. Set up Display Options 4. Define Preferences				
🗄 Dashboard	5. Configure Access 🕨 6. Add User Help				
🗉 Demand Management					
🗉 Project Management	Portlet Help				
⊞ Time Management	Help content will be available to end users when viewing this portlet on their dashboard, and when adding portlets during Dashboard Personalization.				
	Portlet Help Text:				
Program Management	This portiet has been brought to you by <b>XYZ Corp.</b>				
Portfolio Management					
Financial Management					
Deployment Management					
··· Reports					
Administration Open Workbench Open Workbench Open Workbench on Deskt Edt My Profile View My Resource Informat Download Microsoft Project Demand Sets & Process- Project Types & Templat Financials Program Processes Portfolio Management Regions Report Execution Configure Portlet Definitio Import e Portlet Definitio	Preview Help Cancel 4 Back Hext > Preview Finish				
Create a Portlet Definition					
Modules     Product Information					

20. In the **Portlet Help Text** field, type the help text.

This field supports HTML. Use valid HTML tagging when typing the information that defines the functionality of the portlet and lists and describes all of the portlet fields.



Click **Preview Help** to review the help content make sure that you have presented the information as desired.

Click **Preview** to review the layout and make sure that you have presented the information as desired.

21. Click Finish.

The help data is saved, the portlet definition is created, and a status message displayed.

MERCURY	SIGN OUT
	Dashboard - Front Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search Results > Portlet Definition Created
Walcome, Admin User Sep 29, 2006 02:29 42 AM PDT Last Login: 02:306 12:66 AM P Erzand All Collapse All Dashboard Demand Management Project Management Time Management Resource Management Program Management	Create Portlet Definition Sample has been successfully created Configure Sample Greate another Portlet Definition Search for other Portlet Definitions to configure
Program Management     Portfolio Management     Financial Management	
🗄 Deployment Management	
Administration     Open Workbench     Open Wor	
Product Information	

22. Review the information to make determine if your portlet definition was successfully created.

# **Copying Portlet Definitions**

You can copy a portlet definition to use as the basis for another portlet definition.

Note

Java portlet definitions and WSRP portlet definitions cannot be copied.

To copy a portlet definition:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Portlet Definitions > Configure Portlet Definitions.

The Configure Portlet Definitions page appears, as shown in step 2 on page 51.

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see *Creating New Portlet Definitions* on page 54.

The Configure Portlet Definition: < Portlet Definition> page appears.

4. Click Copy.

The Configure Portlet Definition: *<Portlet Definition>* page is updated with the copied information.

5. Provide the portlet information using the information available from step 5 on page 56, step 16 on page 61, and step 17 on page 61.



Click **Preview** to review the layout and make sure that you have presented the information as desired.

- 6. Click Create.
- 7. (Optional) Make any additional modifications and click Save.
- 8. Click Done.

The Configure Portlet Definition: *<Portlet Definition>* page is updated with the information for the original portlet definition.

9. Click Done to return to the Configure Portlets Definitions window.

## **Modifying Portlet Definitions**

To change an existing portlet definition:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Portlet Definitions > Configure Portlet Definitions.

The Configure Portlet Definitions page appears, as shown in step 2 on page 51.

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see *Creating New Portlet Definitions* on page 54.

The Configure Portlet Definition: < Portlet Definition> page appears.

MERCURY										SIGN 0	лит
	Search for a Portlet I Group Totals	Definition 1	<u>to Configure</u> > <u>S</u>	earch Results > S	earch for a P	ortlet Definition to Co	onfigure > <u>Searc</u>	<u>h Results</u> > Er	iit Portlet De		
Welcome, Admin User Sep 29, 2006 02:31:03 AM PDT					•						
Last Login: 9/29/06 12:58 AM P	Configure Por	tlet De	finition: II	MG - Resou	rce Grou	p lotals					
Expand All Collapse All	This is a built-in Portl	et Definitio	on. It cannot be o	deleted.		Preview	Save		Done	Cance	al
3 Dashboard											_
Demand Management	Portlet Type: List	Data S	ource: TMG	Resource Group	Totals						
Project Management	Created By: see	data se	ed data Las:	t Modified Bv:	seed data s	eed_data Last N	Iodification Dat	te: Sep 13	2006		
Time Management	-	_				_					
Resource Management		- Resourc	ce Group Totals								
Program Management	Diopl					the totals of all the R	langu maga in tha	no arouno lat		the louel of e	
Portfolio Management				evious period for t		une totais or air the m	esources in tho	se groups, iei	ung you see	ule level of a	Cuvity
Financial Management	Default Width: Wide										
Deployment Management	Enabled: 💿	res () No	> Not in use.								Сору
Reports											
	Display Prefi	erence F	ields Acce	ess User He	elp						
Administration	Display Column	s									
Open Workbench on Desktc	Columns may be displa		notiat in Data	uit die the weede is	Mint concerned	n the Massimired size	u only Columns	maulaamad	. ontion allu a	usilahin far ti	
Edit My Profile View My Resource Informal	user's selection.	iyeu in trie	s poniel by Dera	uit (in the users ii	illiai view) or i	n trie waxiniizeu vie	w only. Columns	may be made	s optionally a	valiable for tr	le
Download Microsoft Project	User Sortable										
Demand Sets & Process     Project Types & Templat											
H Financials     ■     Financials	Columns Displayed	by Defau	ılt:								
🗄 Program Processes	Resource	A R	ESOURCE_G								
Portfolio Management	Group										
Time Management     Regions	Period Type	P	ERIOD_TYPE	_NAME							
Report Execution	Current Period	А	CTUAL_TIME_	CURRENT							
Portlet Definitions	(Hrs)			-							_
Configure Portlet Definitic Import a Portlet Definition	Previous Period (Hrs)	A	CTUAL_TIME_	PREVIOUS							
Create a Portlet Definition	Current Budget										1
Product Information	(Hrs)	C	URRENT_BU	DGET							
Product mormation	Total Actuals (Hrs)	A	CTUALS_TO_	DATE							
	(113)										
	Columns Displayed	by Defau	lt in Maximize	d View Only:							
	Columns Available f	or Displa	iy:								
	Arrange Data										
	Default Sort By: Re	esource G	Froup (  Ascer  Desce								
	'Default Rows Displ	ayed:	5 In Normal V	lew							
		-	50 In Maximize								
						Preview	Save		Done	Cance	el
										Cante	

• For non-Java portlets:

From the Configure Portlet Definition: *Portlet Definition*> page you can change the following:

- □ General information about the portlet definition
- Display options
- □ Preferences
- □ Access to the portlet definition
- □ User help

- a. (Optional) At any time, you can click Save to commit your changes.
- b. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in step 5 on page 56.
- c. (Optional) Click the link associated with **Data Source** to view the details of the data source in the Workbench.
- d. (Optional) Click the appropriate tab to make changes to the other settings. The content of the tabs varies based on the portlet type. Field descriptions are provided in Chapter 3, *Creating and Maintaining Portlet Definitions*, on page 47.
  - □ For list portlets, see *List Portlet* on page 94.
  - □ For bar charts, see *Bar Chart Portlet* on page 100.
  - □ For clustered bar charts, see *Clustered Bar Chart Portlet* on page 103.
  - □ For stacked bar charts, see *Stacked Bar Chart Portlet* on page 105.
  - □ For pie charts, see *Pie Chart Portlet* on page 107.
  - □ For line charts, see *Line Chart Portlet* on page 108.
  - □ For bubble charts, see *Bubble Chart Portlet* on page 110.
- For Java portlets:

From the Configure Portlet Definition: *<Portlet Definition>* page you can change the following:

- General information about the portlet definition
- □ Access to the portlet definition
- a. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in step 5 on page 56.
- b. (Optional) Configure the user and administrator access using the details provided in step 16 on page 61, and step 17 on page 61.
- 4. Click Done.

📕 🖬 Tip

Click **Preview** to review the layout and make sure that you have presented the information as desired.

# **Deleting Portlet Definitions**

To delete a portlet definition:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Portlet Definitions > Configure Portlet Definitions.

The Configure Portlet Definitions page appears, as shown in step 2 on page 51.

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see *Creating New Portlet Definitions* on page 54.

The Configure Portlet Definition: < Portlet Definition> page appears.

4. Click Delete.

A confirmation dialog box opens.

5. Click OK.

The confirmation dialog box closes and the Configure Portlet Definitions page is updated.

### **Importing Java Portlet Definitions**

To import a Java portlet definition using the Import Portlet Definition wizard:

Note

The .war files must exist on the server file system.

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Portlet Definitions > Import a Portlet Definition.

The Choose Portlet Type step of the Import Portlet Definition page appears.

MERCURY		SIGN OUT
	Dashboard - Front Page > Import Portlet Definition	
Welcome, Admin User Oct 3, 2006 12:56:57 AM PDT Last Login: 10/3/06 12:07 AM P	Import Portlet Definition	
Expand All Collapse All	1. Choose Portlet Type 🕨 2. Select from Available Portlets 🕨 3. Enter Portlet Information 🕨 4. Configure Access	
🗉 Dashboard		
🗄 Demand Management	Choose Portlet Type	
Project Management	Select the type of Portlet you would like to import:	
🗉 Time Management	Java Portlet - Created according to the Java Portlet specification           WSRP Portlet - Created according to WSRP specifications         Image: Created according to WSRP specifications	
	Oversity Ponter - Created according to vestic specifications	
🗄 Program Management	Cancel ∢ Back Hext ▶	
🗄 Portfolio Management		
🗄 Financial Management		
🗄 Deployment Management		
⊟ Administration		
Open Workbench Open Workbench on Desktc Edit My Profile View My Resource Informal Download Microsoft Project		
🗄 Demand Sets & Process		
🕀 Project Types & Templat		
<ul> <li>Program Processes</li> <li>Portfolio Management</li> </ul>		
Time Management		
Hegions		
Report Execution		
Portlet Definitions     Configure Portlet Definitio     Import a Portlet Definition     Create a Portlet Definitior		
<ul> <li>Modules</li> <li></li></ul>		

- 3. Select Java Portlet Created according to the Java Portlet specification.
- 4. Click Next.

The Select from Available Portlets step of the Import Portlet Definition page appears.

MERCURY			SIGN OUT			
	Dash	board - Front Page > Import Portlet Definition	n			
Welcome, Admin User Oct 3, 2006 12:57:31 AM PDT Last Login: 10/3/06 12:07 AM P	Imp	ort Portlet Definition (Java)				
Expand All Collapse All	1. Cho	1. Choose Portlet Type 🕨 2. Select from Available Portlets 🕨 3. Enter Portlet Information 🕨 4. Configure Access				
Dashboard						
Demand Management	Sel	ect from Available Portlets				
Project Management	The Da	shboard has found the Java portlets listed	below. Please select one of these portlets to import.			
Time Management		Portlet Display Name	Description			
Resource Management	~	Project List	Displays general information about ITG Projects, such as how close they are to completion and their scheduled finish date.			
Program Management	~	Summary Task List	Displays general information about Summary Tasks, such as how close they are to completion and			
-	~		their scheduled finish date.			
Portfolio Management		TMG - Time Sheet Approvals	Displays Time Sheets that need approval by the current user.			
Financial Management	۲	TMG - Delinquent Time Sheets	Shows Resources who have not submitted their Time Sheets for a given period.			
Deployment Management	0	Package List	Displays general information about ITG Packages, such as their description and status.			
Reports	~	Request Activity	Displays general activity information about ITGRequests, such as the number of Requests opened and closed during the last two weeks, and the number of open Requests.			
B Administration Open Workbench Open Workbench on Desktc Edit My Profile View My Resource Informal	~	Package Activity	Displays activity information about the number of deployments (Package Line execution step transactions) completed during the last three weeks. Provides drill down to any Object Type or Environment to view the included Packages.			
	~	Request Summary	Displays information about groups of ITGRequests, such as their priority, type, status and the total number of Requests for each category. Additionally provides drill down capabilities to detailed requests.			
Download Microsoft Project	~	Open Requests by Priority	A bar chart that displays the number of Requests currently open, grouped by priority.			
Demand Sets & Process	~	Request List	Displays general information about ITG Requests, such as their description and status.			
<ul> <li>Project Types &amp; Templat</li> <li>Financials</li> <li>Program Processes</li> </ul>	~	Project Gantt	Displays Projects, Tasks and Milestones in Gantt chart format. This portlet can be configured based on such criteria as Project and Task status, schedule and resource assignments. It also allows drilling down into Project and Task details.			
🗄 Portfolio Management	~	Capitalized Project Timelines	A graphical display of projects with capitalized costs showing their start date, end date and health.			
Time Management     Regions	~	Resource Gantt	Displays information about Work items (including Requests, Tasks, Milestones, and Staffing Profiles) assigned to selected Resources in Ganti chart format. Additionally, this portlet provides the ability to drill down into Work item details.			
Report Execution     Portlet Definitions     Configure Portlet Definitic	~	Capitalized Project Breakdown	Displays relevant information about capitalized projects. This portlet can be filtered so show the same projects as Total Exposure, impairment Risks and Capitalized Project Timelines, showing the source data for those graphical portlets.			
Import a Portlet Definition Create a Portlet Definition	~	Impairment Risks	A graphical view of active projects that have capitalized costs, chosen by project health and broken out project.			
Modules	~	Total Exposure	A graphical view of active projects that have capitalized costs grouped by the health of the project.			
Product Information	~	Project Current Cost Metrics	Analyze Current Cost Metrics for Projects.			
	~	Analyze Assignment Load	Analyze Assignment Load Portlet.			
	~	Project Cost Summary	Displays a list of cost information for a Project.			
	~	Program Cost Summary	Displays a list of cost information for a Program.			
	~	Budget To Budget Comparison	Displays a stanked Bar Chart format of Budget Comparisons			

5. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definitions are selected):

- Click **Back** to return to the previous page.
- Click Cancel to stop.

#### 6. Click Next.

The Portlet Information step of the Import Portlet Definition page appears.

MERCURY			SIGN OUT		
	Dashboard - Fro	nt Page > Import Portlet Definition			
Welcome, Admin User Oct 3, 2006 12:58:07 AM PDT Last Login: 10/3/06 12:07 AM P Expand All Collapse All		Import Portlet Definition (Java)  1. Choose Portlet Type  2. Select from Available Portlets 3. Enter Portlet Information 4. Configure Access			
⊕ Dashboard		, ype			
Demand Management	Portlet Information				
🗄 Project Management	'Name:	Package List			
🗄 Time Management	Category:	II Manage Categories			
⊞ Resource Management	Description:	Displays general information about ITG Packages, such as their description and status.			
🗄 Program Management	Default Width:	Narrow 🔽			
🗄 Portfolio Management	Enabled:				
🗄 Financial Management					
🗉 Deployment Management		Cancel 4 Back Hext 🕨	Finish		
⊞ Reports					
⊟ Administration					
Open Workbench Open Workbench on Deskte Edt My Profile View My Resource Informat Download Microsoft Project Demand Sets & Process: Project Types & Templat Financials Program Processes Portfolio Management Time Management Regions Regions Configure Portet Definition Configure Portet Definition					
Create a Portlet Definitior Modules					
Product Information					

- 7. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in step 5 on page 56.
- 8. Click Next.

The Configure Access step of the Import Portlet Definition page appears.

MERCURY		SIGN OUT		
	Dashboard - Front Page > Import Portlet Definition			
Welcome, Admin User Oct 3, 2006 12:58:48 AM PDT Last Login: 10/3/06 12:07 AM P	Import Portlet Definition (Java)			
Expand All Collapse All	1. Choose Portlet Type 🕨 2. Select from Available Portlets 🕨 3. Enter Portlet Information 🕨 4. Configure Access			
🗄 Dashboard				
Demand Management	Configure Access			
🗄 Project Management	User Access			
🗄 Time Management	Users specified below will have access to add this Portlet to their dashboards.			
Resource Management	Require users to have one of these privileges:			
🗄 Program Management	Allow access to only the following users and groups:           Security Type         Hame			
🗄 Portfolio Management	All Users			
🗄 Financial Management	Give Access to: User 🖌 📓 Add			
🗄 Deployment Management				
· Reports	Administrator Access			
Administration	Users specified below will have access to modify this Portlet Definition.			
Open Workbench	Security Type Hame			
Open Workbench on Desktc	All Portlet Definition Administrators			
Edit My Profile View My Resource Informat	Give Access to: User 🔽 🤱 Add			
Download Microsoft Project				
🗄 Demand Sets & Process	WSRP Access			
🕀 Project Types & Templat	Make Portlet available to WSRP Consumers			
🕀 Financials				
🗄 Program Processes				
🕀 Portfolio Management	Cancel 4 Back Hext >	Finish		
🗄 Time Management				
Regions				
Report Execution				
Portlet Definitions     Configure Portlet Definition				
Import a Portlet Definition Create a Portlet Definition				
Modules				
Product Information				

- (Optional) Configure the user and administrator access using the details provided in step 16 on page 61, and step 17 on page 61.
- 9. Click Finish.

The confirmation page appears.

MERCURY		SIGN OUT
Welcome, Admin User Oct 3, 2006 12:59:14 AM PDT Last Login: 10/3/06 12:07 AM P	Import Portlet Definition	
Expand All Collapse All	Package List (Copy) has been successfully imported.	
🗄 Dashboard	Configure Package List (Copy)	
Demand Management	Import another Portlet Definition	
Project Management	Create new Portlet Definition	
-	Search for other Portlet Definitions to configure	
⊞ Time Management		
Resource Management		
🗄 Program Management		
🗉 Portfolio Management		
Financial Management		
Deployment Management		
Administration		
Open Workbench		
Open Workbench on Desktc		
Edit My Profile		
View My Resource Informal Download Microsoft Project		
Download Microsoft Project     Demand Sets & Process		
Project Types & Templat		
Program Processes		
Portfolio Management		
Time Management		
Report Execution		
Portlet Definitions		
Configure Portlet Definitic		
Import a Portlet Definition		
Create a Portlet Definition		
Modules		
Product Information		

- 10. Review the Import Portlet Definition page and verify that the import was successful.
- 11. (Optional) Select the link of your choice.

# **Importing WSRP Portlet Definitions**

To import a WSRP portlet definition using the Import Portlet Definition wizard:

- 1. Make sure that the producer Web URL is available.
- 2. Log on to Mercury IT Governance Center.
- 3. From the menu bar, select Administration > Portlet Definitions > Import a Portlet Definition.

The Choose Portlet Type step of the Import Portlet Definition page appears.

MERCURY		SIGN OUT
	Dashboard - Front Page > Import Portlet Definition	
Welcome, Admin User Oct 3, 2006 01:26:37 AM PDT Last Login: 10/3/06 12:39 AM P	Import Portlet Definition	
Expand All Collapse All	1. Choose Portlet Type 🕨 2. Select from Available Portlets 🕨 3. Enter Portlet Information 🕨 4. Configure Access	
🗄 Dashboard		
🗄 Demand Management	Choose Portlet Type	
🗄 Project Management	Select the type of Portlet you would like to import:	
🗄 Time Management	Java Portlet - Created according to the Java Portlet specification     WSRP Portlet - Created according to WSRP specifications	
⊞ Resource Management		
🗉 Program Management	Cancel	
🗉 Portfolio Management		
🗄 Financial Management		
🗉 Deployment Management		
Administration		
Open Workbench		
Open Workbench on Desktc		
Edit My Profile		
View My Resource Informal Download Microsoft Project		
Demand Sets & Process		
Project Types & Templat		
E Financials		
Program Processes		
Portfolio Management		
Time Management		
∃ Regions		
Report Execution		
Portlet Definitions     Configure Portlet Definitic     Import a Portlet Definition     Create a Portlet Definitior      Modules		
Product Information		
Product mormation		

- 4. Select WSRP Portlet Created according to WSRP specifications.
- 5. Click Next.

The Define Producer Web Service step of the Import Portlet definition page appears.

MERCURY		SIGN OU
T Governance Cente		
Import Portlet De	finition (WSRP)	
	2. Define Producer Web Service      3. Select from Available Portlets     4. Enter Portlet Information     5. Configure Access	
	a contraction of the second	
Define Producer V	/eb Service	
Enter the URL of a web s able to choose one of the	ervice which provides portlets via WSRP. When you click Next, the Dashboard will contlact the web service to determine what portlets are available. You will portlets that it offers.	then be
*WSRP Producer URL:	http://www.myserver.com/wsrp/FinancialPortlets.wsdl	
	Example: http://www.myserver.com/wsrp/FinancialPortlets.wsdl	
	Cancel ◀ Back Next ▶	
	Calicel Dack Hext /	

- 6. In the **WSRP Producer URL** field, type the URL for the Web service providing portlet definitions using WSRP.
- 7. Click Next.

The Web service is contacted to determine what portlet definitions are available.

The Select from Available Portlets page appears.

1. Choo	ose Portiet Type 🕨 2. Define Producer Web Serv	vice > 3. Select from Available Portlets > 4. Enter Portlet Information > 5. Configure Access
Sele	ect from Available Portlets	
The Da import.	shboard has found the portlets listed below from th	ne WSRP producer at http://hummer.merc-int.com/20000/dashboard/wsrp4jproducer.wsdl. Please select one of these portiets to
	Portlet Display Name	Description
۲	Bubble Chart - JL WSRP Export	JL Bubble Chart WSRP export test
0	Bar Chart - JL WSRP Export	JL Bar Chart WSRP Export Testing
0	Clustered Bar Chart - JL WSRP Export	JL Clustered Bar chart test
0	Bar Chart - JL WSRP Export 2	
$\circ$	Pie Chart - JL WSRP Export	JL Pie Chart SWRP Export test
0	List - JL WSRP Export	Jin's WSRP Integration Test with LIST Portlet
$\circ$	Copy of Program List	Displays the programs and their summary conditions.
0	Stacked Bar Chart - JL WSRP Export	JL Stacked Bar Chart WSRP export test
0	Line Chart - JL WSRP Export	JL Line Chart WSRP Export
0	JL - Pie Chart WSRP Test	WSRP Integration Test step # 7
		Cancel

8. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definition are selected):

- Click **Back** to return to the previous page.
- Click **Cancel** to stop.
- 9. Click Next.

The Enter Portlet Information step of the Import Portlet Definition page appears.

MERCURY		SIGN OUT
IT Governance	Center Dashboard - My Front Page > Import Portlet Definition	
	Type       2. Define Producer Web Service       3. Select from Available Portlets       4. Enter Portlet Information       5. Configure Access	
Portlet Info	mation	
*Name: Category:	Stacked Bar Chart - JL WSRP Export	
Description:	JL Stacked Bar Chart WSRP export test	
Default Width:	Narrow	
Enabled:	⊙ Yes ◯ No	
	Cancel  < Back Next  Fin	iish

- 10. Provide the general information using the details from the **Portlet** Information section of the table included in step 5 on page 56.
- 11. Click Next.

The Configure Access step of the Import Portlet Definition page appears.

RCI	URY				SIG
Gover	rnance Ce	enter Dashboard - My Fro			
Imp	ort Portle	et Definition (WSRP)			
1. Cho	bose Portlet Ty	rpe 🕨 2. Define Producer Web	Service 🕨 3. Select from Available Portlets	4. Enter Portlet Information     5. Conf	īgure Access
Cor	nfigure Acc	ess			
Use	er Access				
Users	specified belo	w will have access to add this Po	ortlet to their dashboards.		
		have one of these licenses:	Demand Management		
		have one of these privileges:			
Allow		nly the following users and g	-		
×	Security T Group	уре	Name ITG Administrator		
×	Group		ITG Cost Manager		
×	Group		ITG Demand Manager		
×	Group		ITG Service Security Group		
×	Group		ITG Time Manager		
Give	Access to:	Group 🔽	Add		
Adr	ministrator	Access			
Users	specified belo Security T	w will have access to modify this	s Portlet Definition. Name		
×	User	уре	Bob Nolan		
×	User		Chris Brown		
×	User		Denise Newell		
×	User		Jose Ortega		
×	User		Luis Sanchez		
Give	Access to:	User 🗸	Add		
				Cancel 4 Back	Next 🕨 Finish

- 12. (Optional) Configure the user and administrator access using the details provided in step 16 on page 61, and step 17 on page 61.
- 13. Click Finish.

The confirmation page appears.

MERCURY		SIGN OUT
IT Governance Center	Dashboard - My Front Page > Import Portlet Definition	
Import Portlet Defini	tion (WSRP) Define Producer Web Service  3. Sect from Available Portlets 4. Enter Portlet Information 5. Configure Access	
Configure Access		
Configure Access User Access		

- 14. Review the Import Portlet Definition page and verify that the import was successful.
- 15. (Optional) Select the link of your choice.

## **Migrating Portlet Definitions**

Use the ITG Portlet Definition Migrator object type to migrate portlet definitions. The following are things to consider when migrating portlet definitions:

- When migrating a Mercury-supplied portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- When migrating a standard portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- When migrating a Java portlet definition, you must configure the source and destination servers with the same set of Web applications (such as WARs) before migrating the Java portlet definition.
- When migrating a WSRP portlet definition, the migration of the portlet definition is sufficient for the WSRP portlet to work. Migrating a WSRP portlet definition might fail under the following conditions:
  - □ If the URL uses a port number. If you move that portlet to a different machine whose WSRP provider runs on a different port number, the portlet stops working.
  - If a WSRP portlet definition shares a firewall or a private network with a WSRP producer. You cannot migrate the portlet definition outside of that private network or firewall protected area (because the machine is not accessible).

# **Defining a Drilldown Page**

Portlet drilldown is a powerful feature that allows you to access and view the details of the information displayed in a portlet.

When you create a portlet, you can specify one or more drill-to portlets (these are sometimes called drilldown pages). Clicking a portlet that contains a drill-to portlet results in the display of the corresponding portlet. A drill-to portlet typically offers a view of the data with more details or the information is filtered differently.

- Prior to being added to a portlet, these drill-to portlets must already exist on your Mercury IT Governance Center instance.
- Drill-to portlets must be list portlets created using the portlet builder wizard.
- Only selected Mercury-supplied portlets can be used as drill-to portlets. These include: Issue List, Program Risk List, Program Scope Change List, and Program Project List.

## **Usage Example**

In some cases you may want to view the data in more than one way. Whenever you want to do this, specify one or more drill-to portlets.

For example, suppose you have a portlet that shows a collection of requests. However, you would like to be able to view the breakdown of requests sorted by priority and have insight into some of the requests' details. To provide this information, you would create two drill-to portlets, one showing the requests sorted by priority and the other showing the selected details of the requests. Then you would configure your portlet such that it is linked to these drilldown pages (drill-to portlets).

When you click key areas within the portlet having the drilldown pages, the appropriate data from the drill-to portlets is displayed.

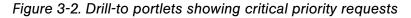


The following figure shows an example of this kind of scenario.

Dashboard Page: DEMO - Portlet-to-I	Portlet Drillown	Switch to page 🔻	Personalize
Page last refreshed: Aug 8, 2006 02:26:39 PM PDT			🔁 Export to PDF
🗖 DEMO - Pie Chart			
-			
Preferences: Request Type(s): Application Issues, A	pp		
DEMO - Pie Chart			
Total: 99	COLUMN_VISIBLE		
38 % 22 % 14%	38% Low 22% High 14% Normal 25% Critical		

#### Figure 3-1. Portlet having drilldown pages

If you click either the amber (25%) wedge or the **Critical** link, the drill-to pages having requests with critical priorities are shown (see *Figure 3-2*). Note that the drill-to page on the left shows the list of requests having the selected priority, whereas the drill-to page on the right shows the selected details of the request.



Priority	Request #	Request	Reqyest	Description	Priority
Critical	30667	#	Туре		
Critical	30649	30667	Application Issues	Gettting stock from front.	Critical
Critical	30641	30649	Application	External Website - Job updates.	Critical
Critical	30622	30043	Issues	External viebsite - Jub updates.	Chucai
Critical	30612	30641	Application	Replace cartridge in Brother labeler.	Critical
	Showing 1 to 5 of 25 p	and Married	Issues		
	Showing 1 to 9 of 29	30622	Application Issues	Tom called about his printer.	Critical
		30612	Application Issues	Research massive port scan/probe on ctti.com	Critical

Alternatively, if you click either the red (38%) wedge or the **Low** link, the drill-to pages having requests with low priorities appear (see *Figure 3-3*).

Figure 3-3. Drill-to portlets showing low priority requests

Priority	Request #	Request #	Reqyest	Description	Priority
.0W	30672	30672	Туре	Mala analysis of disables as David	1
.0W	30654	30672	Application Issues	Make space on full volume on Pearl	Low
0W	30644	30654	Application	Corperate Affiliate	Low
ow	30636		Issues		
0₩	30617	30644	Application	Morning mail and phone support.	Low
	Showing 1 to 5 of 38 Prev New	a.	Issues		
		30636	Application Issues	Move briefing.	Low
		30617	Application Issues	Morning mail / phone msg support.	Low

## **Defining a Drilldown Page**

The following procedure describes how to define a drilldown page. These instructions are applicable to the third step of the portlet builder wizard.



The page from which the drill-to portlets are accessed is sometimes referred to as the drill-from page.

To define a drilldown page for a column:

 On the Set up Display Options step of the Create Portlet Definition (<*Portlet Type*>) page, select Drilldown to Portlet.

. Choose Pontet Type	2. Enter Portlet Information 3. Set up Displa	ay Options 🕨 4. Define Preferences	
. Configure Access	6. Add User Help		
Data Source Map	ping to Chart		
Select a data source co	olumn to map to each chart property:	Sample Pie Chart	
Chart Title:		Chart Title	
Wedge Source:	ACTUALS_TO_DATE	Total: N (Wedge Source Value Total)	Wedge Label
Wedge Size Source:	ACTUALS_TO_DATE	20%	20% <u>Wedge A</u> 25% <u>Wedge B</u>
Wedge Label: Color Source:	ACTUALS_TO_DATE	25%	45% <u>Wedge C</u> 8% 8% <u>Wedge D</u> 2% Wedge E
Fooltip Source:		Toottip	2 % <u>Wedge C</u>
typerlink Options:	No Hyperlink Hyperlink Source: ACTUALS_TO_DATE	✓ 45% (Wedge Size	
(	Orilldown to Portlet: (None)     Edit	(	/

2. Click Edit.

The Edit Drilldown: *Name>* dialog box appears.

	ets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for
	mappings of the selected portlet can be viewed in the table below.
Drill-to Portlets	
Drill-To Preference	Values
Preferences of the Drill-Fro mappings, click Add Data M define the mapping.	n portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional apping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text
Preferences of the Drill-Fro mappings, click Add Data M	

3. Click Add.

The list of available portlet definitions appears.

- 4. Select one or more portlet definitions from the list presented.
- 5. Click OK.

The portlet definition are added to the **Drill-to Portlets** list and the list of available portlet definitions disappears.

	The f	t Drilldown: DEMO - Pie Chart ollowing lists the portlets drilled-to by this hyperlink. You portlet. The drilldown mappings of the selected portlet ca	nay add portlets to the list or remove them as well as edit the drilldown mapping n be viewed in the table below.	gs for
Map From         Map To           Source Column: COLLIMN_HIDDEN         PTP_R_PRIORITY           Preference: CREATED_BY         CREATED_BY           Preference: REQUEST_TYPE_D_LIST         REQUEST_TYPE_D_LIST	DEM	0 - Request List Portlet - 1		
Source Column: COLLMM_HIDDEN         PTP_RL_PRIORITY           Preference: CREATED_BY         CREATED_BY           Preference: REQUEST_TYPE_ID_LIST         REQUEST_TYPE_ID_LIST	Dri Prefei mappi	II-To Preference Values (DEMO - Request Li rences of the Drill-From portlet have been automatically m res, click Add Data Mapping. In the Add Data Mapping w	apped to preferences with the same name in the Drill-To portlet. To create additi	
Preference: CREATED_BY         CREATED_BY           Preference: REQUEST_TYPE_D_LIST         REQUEST_TYPE_D_LIST	Dri Prefei mappi	II-To Preference Values (DEMO - Request Li rences of the Drill-From portiet have been automatically m ngs, click Add Data Mapping. In the Add Data Mapping w the mapping.	apped to preferences with the same name in the Drill-To portlet. To create additionation of the drill-from portlet or enter address use the data source column or preference of the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or enter the drill-from portlet or ent	
Preference: REQUEST_TYPE_D_LIST REQUEST_TYPE_D_LIST	Dri Prefei mappi define	II-To Preference Values (DEMO - Request Li rences of the Drill-From portiet have been automatically m ngs, click Add Data Mapping. In the Add Data Mapping w the mapping. Map From	apped to preferences with the same name in the Drill-To portiet. To create additi ndow, use the data source column or preference of the drill-from portiet or ente Map To	
Add Data Mapping Delete All	Dri Prefei mappi define	II-To Preference Values (DEMO - Request Li rences of the Drill-From portlet have been automatically m rags, click Add Date Mapping. In the Add Date Mapping w the mapping. Map From Source Column: COLUMN_HIDDEN	apped to preferences with the same name in the Drill-To portiet. To create additi ndow, use the data source column or preference of the drill-from portiet or ente Map To PTP_RL_PRIORITY	
	Dri Prefei mappi define	II-To Preference Values (DEMO - Request Li rences of the Drill-From portiet have been automatically m rgs, click Add Data Mapping. In the Add Data Mapping w the mapping. Map From Source Column: COLUMN_HIDDEN Preference: CREATED_BY	apped to preferences with the same name in the Drill-To portlet. To create additionation of preference of the drill-from portlet or enter Map To PTP_RL_PRIORITY CREATED_BY	

Use the up- and down-pointers to rearrange the order of the drill-to portlets.

When displayed, the drill-to portlets appear in the order your selected, in a top to bottom fashion. Narrow portlets will not be displayed side by side.

- 6. (Optional) To change the default mapping between the current portlet definition and the drill-to portlet definition:
  - a. Select a portlet definition from the Drill-to Portlets list.
  - b. Click Add Data Mapping.

The Add Data Mapping dialog box appears.

c. Provide the mapping details using the information from the following table.

Tip

The examples shown in *Usage Samples* on page 85 include annotations that identify the data mappings used in the example.

Field Name (*Required)	Description
	Indicate the data to use.
	Choices include:
*Map Value From	<ul> <li>Data Source Column. Select a column. Choices are limited to the columns available in your data source.</li> </ul>
	<ul> <li>Preference of Drill-From Portlet. Select the desired preference for the portlet.</li> </ul>
	<ul> <li>Text. Enter an alphanumeric string up to 200 characters in length.</li> </ul>
*Man Value To	Select the desired preference from the drill-to portlet.
*Map Value To	Choices are limited to the preference fields in the drill-to portlet.

d. Click Add.

The information is added to the Edit Drilldown: *<Name>* dialog box and the Add Data Mapping dialog box disappears.

- 7. (Optional) To delete a mapping between the current portlet definition and the drill-to portlet definition:
  - a. Select a portlet definition from the Drill-to Portlets list.
  - b. In the Drill-To Preference Values (<Drill-to Portlet>) section, select from the following techniques:
    - Click the **Delete** icon next to the unwanted mapping
    - Click **Delete All** to remove all the mappings at one time

Tip

Occasionally it is easier to delete the existing mappings, then remap the current portlet and drill-to portlet definitions.

8. Once the drilldown is correctly defined, click **Done**.

The Edit Drilldown: <Name> dialog box disappears.

Continue with the configuration and distribution (or publication) of your portlet as you normally would.

## **Usage Samples**

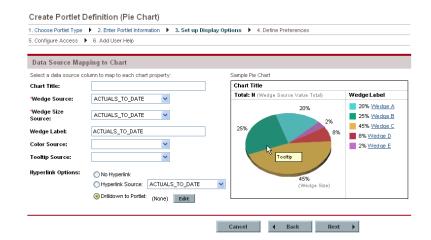
The following images provide details about the data source and portlet configuration used to create the portlets used in the examples shown in this document.



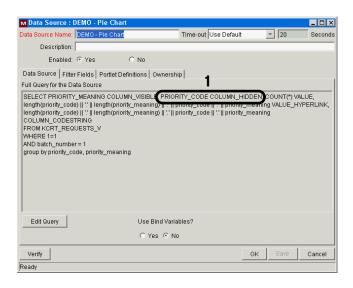
The annotations identify each of the three data mappings.

## **DEMO - Pie Chart Portlet**

This is the drill-from portlet and its various components.



#### **Data Source**



M Data Source : DEMO - Pie Chart			_ 🗆 🗙
Data Source Name: DEMO - Pie Chart	Time-out Use Default	- 20	Seconds
Description:			
Enabled: 💿 Yes 🛛 🔿	No		
Data Source Filter Fields Portlet Defin	tions Ownership		
Seq Name	Validation	Required	Enabled
1 Created By: CREATED_BY	KNTA - User Names - Enabled		Y
2 Request Type(s) REQUEST_TY	PE_ID_L., CRT - Request Types - Enable	d N	Y
<u>+</u>  +	New Edit Remove		
Verify		OK Save	Cancel
Ready			

### **Portlet Definition**

		Preview Save Done Ca	ncel
ortlet Type: Pie	Chart Data Source: <u>DEMO - Pi</u>	e Chart	
reated By:	Last Modified By:	Last Modification Date: Aug 3, 2006	
lame: DEM	10 - Pie Chart		
ategory:	10 Manage	Categories	
escription:			
efault Width: Wid	le 🗸		
nabled: 💿	Yes No In use by 1 user(s), 0 r	nodule(s), and 0 hyperlink(s).	Dele
Data Source Ma	appring to ontart		
Chart Title:	column to map to each chart proper DEMO - Pie Chart COLUMN_VISIBLE	Chart Title Total: N (Wedge Source Value Total) Wedge Label	
Chart Title: Wedge Source: Wedge Size	DEMO - Pie Chart	Chart Title Total: N (Wedge Source Value Total) Wedge Label 20% 20% 25% Wedg 25% Wedg	ie A ie B
Chart Title: Wedge Source: Wedge Size Source:	DEMO - Pie Chart COLUMN_VISIBLE	Chart Title Total: N (Wedge Source Value Total) Vedge Label 20% 20% 25% Wedge 25% Wedge	ie A ie B ie C
Chart Title: Wedge Source: Wedge Size Source: Wedge Label: Color Source:	DEMO - PIC Chart COLUMN_VISIBLE VALUE COLUMN_VISIBLE	Chart Title         Wedge Label           Total: N (Wedge Source Value Total)         20% Wedge           25% Wedge         20%           25% Wedge         45% Wedge           25% Wedge         25% Wedge           25% Wedge         25% Wedge           25% Wedge         25% Wedge           25% Wedge         25% Wedge           25% Wedge         2% Wedge	<u>ie A</u> ie B ie C : D
Chart Title: Wedge Source: Wedge Size Source: Wedge Label: Color Source: Fooltip Source:	DEMO - Pie Chart COLUMN_VISIBLE VALUE COLUMN_VISIBLE COLUMN_VISIBLE	Chart Title         Wedge Label           Total: N (Wedge Source Value Total)         Wedge Label           20%         20% Wedge           25%         2%           25%         8%           6% Wedge         6% Wedge	<u>ie A</u> ie B ie C : D
Chart Title: Wedge Source: Wedge Size Source: Wedge Label: Color Source:	DEMO - Pie Chart COLUMN_VISIBLE VALUE COLUMN_VISIBLE COLUMN_VISIBLE ON0 Hyperlink Hyperlink Source: COLUMN	Chart Title         Wedge Label           Total: N (Wedge Source Value Total)         20% Wedge           25% Wedge         20%           25% Wedge         45% Wedge           25% Wedge         25% Wedge           25% Wedge         25% Wedge           25% Wedge         25% Wedge           25% Wedge         25% Wedge           25% Wedge         2% Wedge	<u>ie A</u> ie B ie C : D

	Close Win
Edit Drilldown: DEMO - P	'ie Chart
The following lists the portlets drilled-to	by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for
each portlet. The drilldown mappings o	f the selected portlet can be viewed in the table below.
Drill-to Portlets	
DEMO - Request List Portlet - 1 DEMO - Request List Portlet - 2	
DEWO - Request List Poniet - 2	<u>۸</u>
	x x
Add Remove	
Aug Keniove	
Drill-To Preference Values (D	DEMO - Request List Portlet - 1)
	ve been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional
	e Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text
define the mapping.	
Map From	Map To
Source Column: COLUMN_HIDD	
Preference: CREATED_BY	
Preference REQUEST_TYPE_ID	
Add Data Mapping De	elete All
	Done Cancel
	Close Win
MERCURY	[chos.w/s
MERCURY	Close Win
MERCURY.	Close Win
Mercury Edit Drilldown: DEMO - P	
Edit Drilldown: DEMO - P	Pie Chart
Edit Drilldown: DEMO - P	Pie Chart
Edit Drilldown: DEMO - P	Pie Chart
Edit Drilldown: DEMO - P The following lists the portlets drilled-to each portlet. The drilldown mappings o	Pie Chart
Edit Drilldown: DEMO - P The following lists the portlets drilled-to each portlet. The drilldown mappings o Drill-to Portlets	Pie Chart
Edit Drilldown: DEMO - P The following lists the portlets drilled-to each portlet. The drilldown mappings o	Pie Chart
Edit Drilldown: DEMO - P The following lists the portlets drilled-to each portlet. The drildown mappings of Xrill-to Portlets DEMO - Request List Portlet - 1	Pie Chart
Edit Drilldown: DEMO - P he following lists the portlets drilled-to ach portlet. The drilldown mappings of rill-to Portlets ZEMO - Request List Portlet - 1	Pie Chart by this hyperlink. You may add portiets to the list or remove them as well as edit the drilldown mappings for if the selected portiet can be viewed in the table below.

	Request List Portlet - 1 Request List Portlet - 2	
	A	
	$\nabla$	
Add	Remove	
orill.T	o Preference Values (DEMO - Rec	nuest List Portlet . 2)
	o recording tantes (DEmo - Rec	Inour Electronic El
ferenc		
		natically mapped to preferences with the same name in the Drill-To portlet. To create additional
ppings	click Add Data Mapping. In the Add Data Ma	natically mapped to preferences with the same name in the Drill-To portlet. To create additional apping window, use the data source column or preference of the drill-from portlet or enter tex
ppings		
ppings fine the	click Add Data Mapping. In the Add Data Ma	
ppings ine the N	click Add Data Mapping. In the Add Data Mapping.	lapping window, use the data source column or preference of the drill-from portlet or enter tex
ppings ine the N	, click Add Data Mapping. In the Add Data Mapping.	apping window, use the data source column or preference of the drill-from portiet or enter tex
ppings fine the V S S P	, click Add Data Mapping. In the Add Data Me mapping. Tap From ource Chamn: COLUMN_HIDDEN	apping window, use the data source column or preference of the drill-from portiet or enter tex
ppings fine the V S S P	click Add Data Mapping. In the Add Data M imapping. Tap From ource Cramn: COLUMN_HIDDEN reference: REQUEST_TYPE_D_LIST reference: CREATED_BY	Apping window, use the data source column or preference of the drill-from portlet or enter tex
ppings ine the N S S P	, click Add Data Mapping. In the Add Data Mi mapping. Tap From ource Comm: COLUMN_HIDDEN reference: REQUEST_TYPE_D_LIST	Apping window, use the data source column or preference of the drill-from portlet or enter tex
ppings fine the N S S S P	click Add Data Mapping. In the Add Data M imapping. Tap From ource Cram: COLUMN_HIDDEN reference: REQUEST_TYPE_D_LIST reference: CREATED_BY	Apping window, use the data source column or preference of the drill-from portlet or enter tex

## **DEMO - Request List Portlet - 1**

This is one of the drill-to portlets and its various components.

Preferenc	es:		
Request #∆	Reqyest Type	Description	Priority
30145	Enhancement Request	Update New Employee Health Care Assignment	Low
30167	Telco Generic	are there required fields?	Low
30210	Gap	Software doesn't support multi-currency	High
30301	System Change Request	New Period Close Reporting for Finance	Normal
30303	System Change Request	Need daily MRP run to start at 23:00 instead of 22:00 to accomodate for longer run times.	Low
		Showing 1 to 5 of 200 Prev Next	Maximize

### **Data Source**

n Data Source : DEN	10 - Request List Portlet - 1			_ 🗆 ×
ata Source Name: DE	MO - Request List Portlet - 1	Time-out Use Default	- 20	Seconds
Description:				
Enabled: 📀	Yes C No			
Data Source   Filter Fie	lds Portlet Definitions Owner	ship		
Full Query for the Data S	Bource			
FROM KCRT_REQUES WHERE 1=1 AND batch_number = '	-			
Edit Query	Use Bind Va	ariables?		
	C Yes @	No		
Verify			OK Save	Cancel
leady				

M Data Source : I	DEMO - Reque	st List Portlet - 1			_ 🗆 ×
Data Source Name:	DEMO - Reque	st List Portlet - 1	Time-out Use Default	▼ 20	Seconds
Description:					
Enabled:	Yes	C No			
Data Source Filter	r Fields   Portlet	Definitions Owner	ship		
Seq Name		Token	Validation		Required E
1 Created B	CREATE		ITA - User Names - Enabled		N Y
2 Request Typ			T - Request Types - Enabled		N Y
3 Priority	PTP_RL	_PRIORITY	M Filter - Priority - Enabled (wi	th blank)	N Y
4					
, 		New	Edit Remove		
Verify			C	K Save	Cancel
Ready					

### **Portlet Definition**

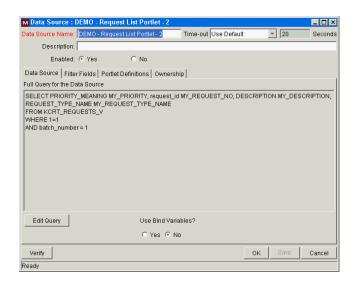
									Preview		Sav	e	Done		Cancel
Portie	et Type:	List Da	ta So	rce:	DEMO - F	Request Li	st Portlet -	<u>- 1</u>							
Creat	ted By:		L	st Mo	dified By	:	L L	ast Modi	ication Date:	Auj	g 3, 2006				
Nam	ie:	DEMO - R	equest	List Po	rtlet - 1										
Categ	gory:			E	E M	anage Cat	egories	I							
Desc	ription:														
Defau	ult Width:	Wide	*												
Enabl	led:	📀 Yes 🄇	No	In use I	oy O user	(s), 0 mod	ule(s), an	d 1 hyperl	nk(s).				View Usage	Сору	Delet
Di	isplay	Preferenc	e Fie	ds	Access	Use	r Help								
Dis	splay Col	umns													
	d Column	to select	lit	Dele	te User Sorl	able									
Click o Colur	on a column mns Displa	to select iyed by De	efault:		User Sori	able									
Click o Colur	on a column	to select ayed by De	[	My Pr	User Sori										
Click o Colur	on a column mns Displa Priority	to select nyed by De t #	efault: ▲	My Pri My Re	User Sort	0									
Colur Colur Colur	on a column mns Displa Priority Reques	to select nyed by Do t #	efault: ▲	My Pri My Re	User Sort	0									
Click c Colur A V Colur Colur	n a column mns Displa Priority Reques	to select nyed by De t #	efault: ▲	My Pri My Re	User Sort	0									
Click c Colur Colur Colur Colur	nn a column mns Displa Priority Reques mns Displa mns Availa	to select nyed by De t # nyed by De able for Di ta	[ 	My Pri My Re	User Sort	0	Asc	cending							

## **DEMO - Request List Portlet - 2**

This is the other drill-to portlet and its various components.

Preferenc	es:		
Request #∆	Reqyest Type	Description	Priority
30145	Enhancement Request	Update New Employee Health Care Assignment	Low
30167	Telco Generic	are there required fields?	Low
30210	Gap	Software doesn't support multi-currency	High
30301	System Change Request	New Period Close Reporting for Finance	Normal
30303	System Change Request	Need daily MRP run to start at 23:00 instead of 22:00 to accomodate for longer run times.	Low
		Showing 1 to 5 of 200 Prev Next	<u>Maximize</u>

#### **Data Source**



M Data Source : DEMO - Request List Portlet - 2	_ 🗆 ×
Data Source Name: DEMO - Request List Portlet - 2 Time-out Use Default 💌 20	Seconds
Description:	
Enabled: © Yes C No	
Data Source Filter Fields Portlet Definitions Ownership	
Seq Name Validation	Required E
1 Created By CREATED_BY NTA - User Names - Enabled	N Y
2 Request Type 5 REQUEST_TYPE_ID_L RT - Request Types - Enabled	N Y
3 Priority PTP_RL_PRIORITY DEM Filter - Priority - Enabled (with blank)	N Y
<u> </u>	►
New Edit Remove	
Verify OK Save	Cancel
Ready	

### **Portlet Definition**

configure	e Portlet D	efinition: DEMO - R	aquest List P	ortlet - 2			
				Preview	Save	Done	Cancel
ortlet Type:	List Data	Source: DEMO - Request Li	ist Portlet - 2				
created By:		Last Modified By:	Last Mod	ification Date: A	ug 3, 2006		
Name:	DEMO - Request List Portiet - 2						
ategory:							
escription:							
efault Width: Wide V							
nabled:	⊙ Yes ◯ N	No In use by Ouser(s), Omoc	lule(s), and 1 hyper	link(s).	í	View Usage	Copy Delete
Display	Preference	Fields Access Use	er Help				
Display C	olumns						
olumns may b	e displayed in th	the portlet by Default (in the use	er's initial view) or in	n the Maximized vie	w only. Columns mar	y be made optionally :	available for the
ser's selectio							
Add Column	Edit	Delete					
lick on a colu	nn to select	User Sortable					
	played by Defa	ault:					
Requ	est#∆	▲ My Request No					
Requ	est Type	My Request Type Nam	e				
Desc	ription	My Description					
Priori	ity	My Priority					
olumns Dis 🖌	played by Defa	ault in Maximized View Only	<i>п</i>				
V							
-							
olumns Ava	ilable for Disp	play:					
Arrange I	Data						
Default Sort	By: Request a	# 🗸	<ul> <li>Ascending</li> </ul>				
			Descending				
Default Row	s Displayed:	5 In Normal View					
		50 In Maximized Vi	BW				
				Preview	C	Dama	Cancel
				Preview	Save	Done	Cancel

# **Managing Portlet Categories**

Managing categories is an optional step when creating or maintaining portlet definitions.

Portlet categories define an entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet can make a portlet easier to find.

## **Adding Portlet Categories**

To add a portlet category:

- 1. Click Manage Categories, on either the:
  - Enter Portlet Information step of the Create Portlet Definition (<*Portlet Type*>) page
  - Configure Portlet Definition: <*Portlet Definition*> page

The Manage Categories dialog box appears.

	Category
**	Portfolio Management
**	Program Management
**	Projects
**	Time Management
**	- Financial Management
**	Resource Management
**	Packages
**	Requests

- 2. Type a new category name in the New Category field.
- 3. Click Add.

The new category is added to the list.

4. Click Done.

The Manage Categories dialog box is closed.

## **Deleting Portlet Categories**

To delete a portlet category:



Mercury-supplied portlet categories cannot be deleted. Also, you cannot delete a portlet category containing one or more portlet definition, and any such categories do not include a **Delete** icon.

- 1. Click Manage Categories, on either the:
  - Enter Portlet Information step of the Create Portlet Definition (<*Portlet Type*>) page
  - Configure Portlet Definition: <*Portlet Definition*> page

The Manage Categories dialog box appears.

2. Click the **Delete** icon next to the portlet category.

The portlet category is deleted.

3. Click Done.

The Manage Categories dialog box is closed.

# **Supplemental Details for the Set Up Display Option Step**

This section provides relevant details for the Set up Display options for the various portlet types. This information is used in step 7 on page 57.

## **List Portlet**

MERCURY SIGN OUT					
	Dashboard - Front Page > Dashboard - My Personalized Page > Search for a Portlet Definition to Configure > Search Results > Create Portlet Definition				
Welcome, Admin User Sep 29, 2006 02:23:06 AM PDT Last Login: 9/29/06 12:58 AM P	Create Portlet Definition (List)				
Expand All Collapse All	1. Choose Portlet Type  2. Enter Portlet Information  3. Set up Display Options  4. Define Preferences				
🗄 Dashboard	5. Configure Access 🕨 6. Add User Help				
🗉 Demand Management					
	Display Columns				
🗄 Time Management	Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.				
Resource Management     ■	Add Column Edit Delete				
🗄 Program Management					
🗄 Portfolio Management	ent Click on a column to select User Sortable				
	eployment Management eports dministration				
Deployment Management					
Reports					
Administration					
Open Workbench Open Workbench on Desktc Edit My Profile View My Resource Informal Download Microsoft Project Demand Sets & Process- Project Types & Templat	Columns Displayed by Default in Maximized View Only:				
Financials     Processor					
	Columns Available for Display:				
🕀 Time Management					
Regions	Arrange Data				
Report Execution	Default Sort By: Requests 🛛 🕑 🐼 Ascending				
Portlet Definitions     Configure Portlet Definitic     Import a Portlet Definition     Create a Portlet Definitior     Modules	Definition 'Default Rows Displayed: 5 In Normal View				
Product Information					
	Cancel 4 Back Hext >				

Figure 3-4. Set up Display Options for list portlets

Table 3-1. Set up Display Options field descriptions for list portlets (page 1 of 2)

Field Name (*Required)	Description
Display Columns section	
Add Column	Click to add a new column. See <i>Adding Columns</i> on page 96 for details.
Edit	Select a column, then click to make changes to that column. See <i>Editing Columns</i> on page 99 for details.

Field Name (*Required)	Description
Delete	Select a column, then click to remove that column. See <i>Deleting Columns</i> on page 100 for details.
Columns Displayed by Default	Use the up- and down-pointers to rearrange the order of the columns. Choices include the columns whose <b>Display</b> value is set to either <b>By Default - Shown in user's</b> <b>initial view</b> or <b>Always - Cannot be removed by</b>
Columns Displayed by Default in Maximized View Only	user. Use the up- and down-pointers to rearrange the order of the columns. Choices include the columns whose <b>Display</b> value is set to <b>In Maximized View Only - Shown by</b> <b>default in Maximized View.</b>
Columns Available for Display	Use the up- and down-pointers to rearrange the order of the columns. Choices include the columns whose <b>Display</b> value is set to <b>Optional</b> – Available for display by user.
Arrange Data section	
Default Sort By	Select the default column used to sort the data. Choices include the columns whose <b>User</b> <b>Sortable</b> value is set to <b>Yes.</b>
Ascending/Descending	Indicate whether to sort the data in <b>Ascending</b> and <b>Descending</b> order.
*Default Rows Displayed in Normal View	Specify the default number of records displayed in a normal view portlet. Type any integer greater than zero.
*Default Rows Displayed in Maximized View	Specify the default number of records displayed in a maximized portlet. Type any integer greater than zero.

Table 3-1. Set up Display Options field descriptions for list portlets(page 2 of 2)

## Adding Columns

To add a new column to a list portlet:

1. Click Add Column.

The Add Display Column dialog box opens.

"Column Title:       Status         "Column Type:       Text         "Column Type:       Text         "Visible Text Source:       Source contains HTML.         Column Width:       Small         Truncate after:       Characters         Characters       Show Full Text In Tootlip         Tootlip Source:       Source contains HTML.         User Sortable:       Image: Source contains HTML.         Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display by user         Image: Display:       Optional - Available for display user         Image: Display:       Optional - Available for display user         Image: Display:       Optional - Available for display user         Image: Display:       Optional - Availa	
Visible Text Source: STATUS Source contains HTML. Column Width: Small Show Full Text in Toottip Truncate after: Characters Show Full Text in Toottip Toottip Source: Source contains HTML User Sortable: Oyteonal - Available for display by user Optional - Available for display by user	
Image: Source contains html         Column Width:         Small         Truncate after:         Characters         Show Full Text in Tootip         Tootip Source:         Image: Source contains HTML         User Sortable:         Optional - Available for display by user         Optional - Available for display by user     <	
Truncate after:       Characters       Show Full Text in Tootip         Tootip Source:       Source contains HTML         User Sortable:       Yes       No         Display:       Optional - Available for display by user       Optional - Available for display by user         O Py Default - Shown in user's initial view       In Maximized View Only - Shown by default in Maximized View	
Toottip Source:       Source contains HTML         User Sortable:       Yes No         Display:       Optional - Available for display by user         Optional - Available for display b	
User Sortable:	
Display: Optional - Available for display by user	
Optional - Available to days by date     Optional - Shown in user's initial New     On Maximized View Only - Shown by default in Maximized View	
O In Maximized View Only - Shown by default in Maximized View	
Always - Cannot be removed by user	
Hyperlink Options: ONo Hyperlink	
O Hyperlink Source: COPY_URL	
Orildown to Portlet: TMG - Total Hrs by Work Rem     Edite	

2. Provide the column details using the information from the following table.



Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of the following table.

Field Name (*Required)	Description		
All Column Types			
*Column Title	Specify the column title to be displayed in the portlet. Type any alphanumeric string (up to 200 characters in length).		
*Column Type	Select the column type. Choices include: Text Text with Icon Icon Progress Bar		

Field Name (*Required)	Description	
Tooltip Source	Select the source for the tooltip which should appear when a user hovers over an item. Choices are limited to those columns in the data source configured for this portlet definition on your Mercury IT Governance Center instance.	
Source contains HTML	Select to enable HTML support for <b>Tooltip Source.</b>	
User Sortable	Indicate whether or not the current column can be used for sorting purposes.	
Display	<ul> <li>Select how the column should be displayed.</li> <li>Choices include:</li> <li>Optional. Make the column available to the user in the portlet's edit page (Available Column).</li> <li>By Default. Make the column visible in the portlet (Displayed Column).</li> <li>In Maximized View Only. Make the column visible in the portlet's Maximized View only (Additional Columns Displayed in Maximized View).</li> <li>Always. Make the column visible in the portlet (Displayed Column visible in the portlet (Displayed Column visible in the portlet (Displayed Column visible in Maximized View).</li> </ul>	
Hyperlink Options	<ul> <li>Specify whether the column can be linked to another page or portlet.</li> <li>Choices include:</li> <li>No Hyperlink. Links to other pages are not allowed.</li> <li>Hyperlink Source. Link to the selected column.</li> <li>Drilldown to Portlet. Drill down to the selected portlet. See <i>Defining a Drilldown Page</i> on page 79 for details.</li> </ul>	
Column Type: Text and Text with Icon		
*Visible Text Source	Select the data column that contains the information to display in the portlet. Choices are limited to those columns in the data source configured for this portlet definition on your Mercury IT Governance Center instance.	
Source contains HTML	Select to enables HTML support <b>Visible Text Source.</b>	

Field Name (*Required)	Description
Column Width	Select the weight of column relative to the others. Choices include: Small Medium Large
Truncate after <x> Characters</x>	When <b>Source contains HTML</b> for <b>Visible Text</b> <b>Source</b> is selected, specify the number of characters to show in the column. Type any integer greater than zero.
Show Full Text in Tooltip	When a value is supplied for <b>Truncate after </b> <i>X</i> <b>&gt;Characters,</b> select to show the full text a in tooltip.
Column Type: Icon or Text v	vith Icon
*Icon Source	Select the source for the icon. Choices are limited to those columns in the data source configured for this portlet definition on your Mercury IT Governance Center instance or a column predefined with icon URLs.
Column Type: Progress Bar	
*Percentage Source	Choices are limited to those columns in the data source configured for this portlet definition on your Mercury IT Governance Center instance or a column predefined with percentage information.
Color Source	Select the source for the color. See Selecting Portlet Colors on page 113 for details.

#### 3. Click Done.

The Add Display Column dialog box closes and the new column is added to the Create Portlet Definition (List) page.

### **Editing Columns**

To modify an existing column in a list portlet:

- 1. Select the column to be modified.
- 2. Click Edit.

The Edit Display Column: <*Column Title*> dialog box opens.

*Column Title:	Status
*Column Type:	Text
*Visible Text Source:	STATUS Source contains HTML
Column Width:	Small V
Truncate after:	Characters Show Full Text in Tooltip
Tooltip Source:	Source contains HTML
User Sortable:	⊙ Yes ⊜ No
Display:	Optional - Available for display by user
	By Default - Shown in user's initial view
	O In Maximized View Only - Shown by default in Maximized View
	Always - Cannot be removed by user
Hyperlink Options:	O No Hyperlink
	O Hyperlink Source: COPY_URL
	Orilldown to Portlet: TMG - Total Hrs by Work Item      Edit

3. Make the desired changes using the information from the table in step 2 on page 96 as a guideline.



Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of that table.

4. Click Done.

The Edit Display Column: *Column Title>* dialog box closes and any applicable changes are noted on the Create Portlet Definition (List) page.

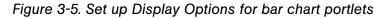
## **Deleting Columns**

To delete an existing column from a list portlet:

- 1. Select the column to be removed.
- 2. Click Delete.

The column is deleted from the Create Portlet Definition (List) page.

## **Bar Chart Portlet**



MERCURY			SIGN OUT
	Search Results > Edit	Portlet Definition: TMG - Resource Group Totals >	Search for a Portlet Definition to Configure > Search Results > Create Portlet Definition
Welcome, Admin User Sep 29, 2006 02:37:12 AM PDT Last Login: 9/29/06 12:58 AM P	Create Portlet [	Definition (Bar Chart)	
Expand All Collapse All	1. Choose Portlet Type	2. Enter Portlet Information     3. Set up D	Display Options 🕨 4. Define Preferences
🗄 Dashboard	5. Configure Access	<ul> <li>6. Add User Help</li> </ul>	
🗉 Demand Management			
🗉 Project Management	Data Source Map		
🗉 Time Management		olumn to map to each chart property:	Sample Bar Chart
Resource Management	Chart Title:		Chart Title Bar Axis Label
	'Bar Source:	ASSIGNED_TO_FULL_NAME	Bar Axis Labei
Program Management	Bar Axis Label:		Bar A
🗄 Portfolio Management	'Bar Value Source:	ASSIGNED_TO_FULL_NAME	
🗉 Financial Management	Value Axis Label:		Bar B –
🗄 Deployment Management	Orientation:	Horizontal 🗸	Bar C
Reports	Color Source:	~	Toottip
Administration	Tooltip Source:	~	Bar D -
Open Workbench			
Open Workbench on Desktc Edit My Profile	Hyperlink Options:	No Hyperlink	Bar E
View My Resource Informal		Hyperlink Source: ASSIGNED_TO_EMAIL	(BarValue) n n n n n n
Download Microsoft Project		O Drilldown to Portlet: (None) Edit	Value Axis Label
🗄 Demand Sets & Process			
🕀 Project Types & Templat			
			Cancel d Back Hext
Program Processes			
Regions			
Report Execution			
Portlet Definitions			
Configure Portlet Definitic			
Import a Portlet Definition			
Create a Portlet Definition			
Modules			
Product Information			

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Bar Source	Select a source column for the information to be displayed on the bar axis. Choices are limited to those columns available in your portlet data source.
Bar Axis Label	Specify the label for the bar axis. Type any alphanumeric string (up to 200 characters in length.)
*Bar Value Source	Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in your portlet data source.
Value Axis Label	Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.)
Orientation	<ul><li>Indicate the orientation of the bars.</li><li>Choices include:</li><li>Horizontal</li><li>Vertical</li></ul>

Table 3-2. Set up Display Options field descriptions for bar chart portlets(page 1 of 2)

Field Name (*Required)	Description
	Select the source for the color.
Color Source	See Selecting Portlet Colors on page 113 for details.
Tooltin Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item.
Tooltip Source	Choices are limited to those columns available in your portlet data source.
	Specify whether the column can be linked to another page or portlet.
	Choices include:
Hyperlink Options	<ul> <li>No Hyperlink. Links to other pages are not allowed.</li> </ul>
	• Hyperlink Source. Link to the selected column.
	<ul> <li>Drilldown to Portlet. Drill down to the selected portlet. See <i>Defining a Drilldown Page</i> on page 79 for details.</li> </ul>

Table 3-2. Set up Display Options field descriptions for bar chart portlets
(page 2 of 2)

## **Clustered Bar Chart Portlet**

MERCURY						1	SIGN OUT
	Search Results > Edit	Portlet Definition: TMG - Resource Group Totals > S	Search for a P	ortlet Definition to	o Configure > Sear	<u>ch Results</u> > Create Portle	et Definition
Welcome, Admin User Sep 29, 2006 02:37:47 AM PDT Last Login: 9/29/06 12:58 AM P	Create Portlet [	Definition (Clustered Bar Chart)					
Expand All Collapse All	1. Choose Portlet Type	2. Enter Portlet Information     3. Set up Di	isplay Option	ns 🕨 4. Defin	e Preferences		
🗉 Dashboard	5. Configure Access	<ul> <li>6. Add User Help</li> </ul>					
Demand Management							
Project Management	Data Source Map	pping to Chart					
	Select a data source c	olumn to map to each chart property:	Sa	mple Clustered E	9ar Chart		
⊞ Time Management	Chart Title:		C	Chart Title			
Resource Management	*Cluster Source:	ASSIGNED_TO_FULL_NAME	C	Cluster Axis La	bel		
🗄 Program Management	Cluster Axis						
🗄 Portfolio Management	Label:			Cluster 1 –			
Financial Management	'Bar Source:	ASSIGNED_TO_FULL_NAME					
Deployment Management	Bar Label:						
Reports	'Bar Value Source:	ASSIGNED_TO_FULL_NAME		Cluster 2 –			
	Value Axis Label:						
Administration     Open Workbench	Orientation:	Horizontal 🗸				Tooltip	
Open Workbench on Desktc	Color Source:	×		Cluster 3 –			
Edit My Profile View My Resource Informal				(Bar Value) <b>n</b>	n n		
Download Microsoft Project	Tooltip Source:	~		(		ue Axis Label	
🗄 Demand Sets & Process <sup>,</sup>	Hyperlink Options:	No Hyperlink		BarLabel			
Project Types & Templat		OHyperlink Source: ASSIGNED_TO_EMAIL	~	Bar A	Bar B	Bar C	
		Oprilldown to Portlet: (None)					
Portfolio Management							
Time Management							
Regions     ■     Regions     ■			Ca	ncel	Back	Next 🕨	
Report Execution							
Portlet Definitions Configure Portlet Definitic							
Import a Portlet Definition							
Create a Portlet Definition							
Modules							

Figure 3-6. Set up Display Options for clustered bar chart portlets

Table 3-3. Set up Display Options field descriptions for clustered bar chartportlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Cluster Source	Select a source column for the information to be displayed in the cluster. Choices are limited to those columns available in your portlet data source.
Cluster Axis Label	Specify the label for the cluster axis. Type any alphanumeric string (up to 200 characters in length.)
*Bar Source	Select a source column for the information to be displayed for the bars. Choices are limited to those columns available in your portlet data source.

Field Name (*Required)	Description
Bar Label	Specify the label for the legend. Type any alphanumeric string (up to 200 characters in length.)
*Bar Value Source	Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in
Value Axis Label	your portlet data source. Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.)
Orientation	Indicate the orientation of the bars. Choices include: Horizontal Vertical
Color Source	Select the source for the color. See Selecting Portlet Colors on page 113 for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	<ul> <li>Specify whether the column can be linked to another page or portlet.</li> <li>Choices include:</li> <li>No Hyperlink. Links to other pages are not allowed.</li> <li>Hyperlink Source. Link to the selected column.</li> <li>Drilldown to Portlet. Drill down to the selected portlet. See <i>Defining a Drilldown Page</i> on page 79 for details.</li> </ul>

Table 3-3. Set up Display Options field descriptions for clustered bar chartportlets (page 2 of 2)

### **Stacked Bar Chart Portlet**

MERCURY			SIGN OUT
	Search Results > Edit	Portlet Definition: TMG - Resource Group Totals >	Search for a Portlet Definition to Configure > Search Results > Create Portlet Definition
Welcome, Admin User Sep 29, 2006 02:38:40 AM PDT Last Login: 9/29/06 12:58 AM P	Create Portlet I	Definition (Stacked Bar Chart)	
Expand All Collapse All	1. Choose Portlet Type	2. Enter Portlet Information     3. Set up D	isplay Options   4. Define Preferences
🗄 Dashboard	5. Configure Access	<ul> <li>6. Add User Help</li> </ul>	
🗄 Demand Management			
Project Management	Data Source Maj	pping to Chart	
	Select a data source c	olumn to map to each chart property:	Sample Stacked Bar Chart
Time Management	Chart Title:		Chart Title
Resource Management	'Bar Source:	ASSIGNED_TO_FULL_NAME	Bar Axis Label
🗄 Program Management	Bar Axis Label:		Bar A
🗄 Portfolio Management	'Bar Division		
🗄 Financial Management	Source:	ASSIGNED_TO_FULL_NAME	Bar B - (Bar Division Value)
Deployment Management	Bar Division Label:		
⊞ Reports	'Bar Division Value Source:	ASSIGNED_TO_FULL_NAME	Bar C
Administration	Value Axis Label:		Bar D
Open Workbench Open Workbench on Desktc	Orientation:	Horizontal 🗸	
Edit My Profile	Color Source:	×	
View My Resource Informal			(Bar Value) N N N N N N N N N
Download Microsoft Project Demand Sets & Process	Tooltip Source:	~	Value Axis Label
Project Types & Templat	Hyperlink Options:	No Hyperlink	Bar Division Label
Financials		OHyperlink Source: ASSIGNED_TO_EMAIL	🔜 📕 Bar Division F 📕 Bar Division G 📕 Bar Division H
Program Processes			Bar Division I 📕 Bar Division J
Portfolio Management		Drilldown to Portlet: (None) Edit	
🗄 Time Management			
Regions			Cancel 4 Back Next ►
Report Execution			Cancer dack Hext
Portlet Definitions			
Configure Portlet Definitic			

Figure 3-7. Set up Display Options for stacked bar chart portlets

Table 3-4. Set up Display Options field descriptions for stacked bar chartportlets (page 1 of 2)

Field Name (*Required)	Description
	Specify a name for the chart.
Chart Title	Type any alphanumeric string (up to 200 characters in length).
*Por Source	Select a source column for the information to be displayed on the bar axis.
*Bar Source	Choices are limited to those columns available in your portlet data source.
	Specify the label for the bar axis.
Bar Axis Label	Type any alphanumeric string (up to 200 characters in length).
	Select the source column for the bar divisions.
*Bar Division Source	Choices are limited to those columns available in your portlet data source.
Bar Division Label	Specify the label for the bar divisions.

Field Name (*Required)	Description
*Bar Division Value Source	Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar).
	Choices are limited to those columns available in your portlet data source.
	Specify the label for the value axis.
Value Axis Label	Type any alphanumeric string (up to 200 characters in length.)
	Indicate the orientation of the bars.
Orientation	Choices include:
	Horizontal
	Vertical
	Select the source for the color.
Color Source	See Selecting Portlet Colors on page 113 for details.
	Select the source column for the tooltip to be displayed when the cursor hovers over an item.
Tooltip Source	Choices are limited to those columns available in your portlet data source.
	Specify whether the column can be linked to another page or portlet.
Hyperlink Options	Choices include:
	<ul> <li>No Hyperlink. Links to other pages are not allowed.</li> </ul>
	• Hyperlink Source. Link to the selected column.
	<ul> <li>Drilldown to Portlet. Drill down to the selected portlet. See <i>Defining a Drilldown Page</i> on page 79 for details.</li> </ul>

Table 3-4. Set up Display Options field descriptions for stacked bar chartportlets (page 2 of 2)

## **Pie Chart Portlet**

MERCURY						SIGN OUT
	Search Results > Edit	Portlet Definition: TMG - Resource Group To	tals > <u>Search for</u>	a Portlet Definition to Configure >	Search Results	> Create Portlet Definition
Welcome, Admin User Sep 29, 2006 02:39:04 AM PDT Last Login: 9/29/06 12:58 AM P		Definition (Pie Chart)				
Expand All Collapse All		2. Enter Portlet Information 3. Se	t up Display Op	tions  4. Define Preferences		
🗄 Dashboard	5. Configure Access	<ul> <li>6. Add User Help</li> </ul>				
🗄 Demand Management						
Project Management	Data Source Map	ping to Chart				
Time Management	Select a data source ci	olumn to map to each chart property:		Sample Pie Chart		
	Chart Title:			Chart Title		
Resource Management	'Wedge Source:	ASSIGNED_TO_FULL_NAME		Total: N (Wedge Source Value	Total)	Wedge Label
🗄 Program Management	'Wedge Size			20%		20% <u>Wedge A</u>
🗉 Portfolio Management	Source:	ASSIGNED_TO_FULL_NAME			2%	25% <u>Wedge B</u>
Financial Management	Wedge Label:			25%	8%	45% Wedge C
	Color Source:	~				8% Wedge D
Deployment Management				4	)	2% Wedge E
	Tooltip Source:	×		Tooltip		
Administration	Hyperlink Options:	No Hyperlink				
Open Workbench		Hyperlink Source: ASSIGNED_TO_EI	MAIL 🔽	45%	dge Size)	
Open Workbench on Desktc		O Drilldown to Portlet: (None) Edit				
Edit My Profile View My Resource Informal		O Dhildown to Portiet. (None) Edit				
Download Microsoft Project						
🗄 Demand Sets & Process				Cancel d Back	Next	•
🗄 Project Types & Templat						
Financials						
Program Processes						
Portfolio Management						
Time Management						
Regions						
Report Execution						
Portlet Definitions Configure Portlet Definitic						

Figure 3-8. Set up Display Options for pie chart portlets

Table 3-5. Set up Display Options field descriptions for pie chart portlets(page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Wedge Source	Select the source column for the wedge (pie slice). Choices are limited to those columns available in your portlet data source.
*Wedge Size Source	Select the <i>numeric</i> source column which determines the size of each wedge. Choices are limited to those columns available in your portlet data source.
Wedge Label	Specify a label for the wedges. Type any alphanumeric string (up to 200 characters in length).

Field Name (*Required)	Description
	Select the source for the color.
Color Source	See Selecting Portlet Colors on page 113 for details.
Tooltin Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item.
Tooltip Source	Choices are limited to those columns available in your portlet data source.
	Specify whether the column can be linked to another page or portlet.
	Choices include:
Hyperlink Options	<ul> <li>No Hyperlink. Links to other pages are not allowed.</li> </ul>
	• Hyperlink Source. Link to the selected column.
	<ul> <li>Drilldown to Portlet. Drill down to the selected portlet. See <i>Defining a Drilldown Page</i> on page 79 for details.</li> </ul>

Table 3-5. Set up Display Options field descriptions for pie chart portlets
(page 2 of 2)

#### **Line Chart Portlet**

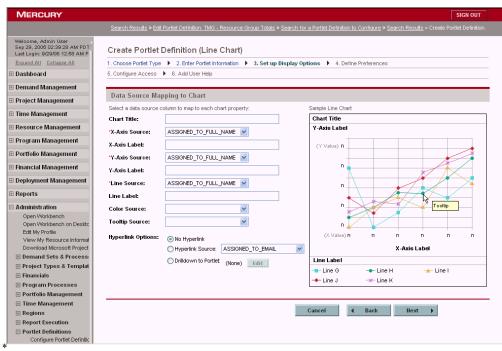


Figure 3-9. Set up Display Options for line chart portlets

Table 3-6. Set up Display Options field descriptions for line chart portlets(page 1 of 2)

Field Name (*Required)	Description
	Specify a name for the chart.
Chart Title	Type any alphanumeric string (up to 200 characters in length).
	Select the source column for the x-axis.
*X-Axis Source	Choices are limited to those columns available in your portlet data source.
	Specify a label for the x-axis.
X-Axis Label	Type any alphanumeric string (up to 200 characters in length).
	Select the <i>numeric</i> source column for the y-axis.
*Y-Axis Source	Choices are limited to those columns available in your portlet data source.
	Specify a label for the y-axis.
Y-Axis Label	Type any alphanumeric string (up to 200 characters in length).

Field Name (*Required)	Description
*Line Source	Select the source column for each line. Choices are limited to those columns available in your portlet data source.
Line Label	Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length).
Color Source	Select the source for the color. See <i>Selecting Portlet Colors</i> on page 113 for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	<ul> <li>Specify whether the column can be linked to another page or portlet.</li> <li>Choices include:</li> <li>No Hyperlink. Links to other pages are not allowed.</li> <li>Hyperlink Source. Link to the selected column.</li> <li>Drilldown to Portlet. Drill down to the selected portlet. See <i>Defining a Drilldown Page</i> on page 79 for details.</li> </ul>

Table 3-6. Set up Display Options field descriptions for line chart portlets
(page 2 of 2)

#### **Bubble Chart Portlet**

MERCURY			SIGN OUT		
WENCONT	Search Results > Edit	Portlet Definition: TMG - Resource Group Totals > Set	arch for a Portlet Definition to Configure > Search Results > Create Portlet Definition		
Welcome, Admin User Sep 29, 2006 02:39:56 AM PDT			······································		
Last Login: 9/29/06 12:58 AM P	Create Portlet I	Definition (Bubble Chart)			
Expand All Collapse All	1. Choose Portlet Type 🕨 2. Enter Portlet Information 🕨 3. Set up Display Options 🕨 4. Define Preferences				
🗄 Dashboard	5. Configure Access 🕨 6. Add User Help				
🗉 Demand Management					
🗉 Project Management	Data Source Maj	ping to Chart			
Time Management	Select a data source c	olumn to map to each chart property:	Sample Bubble Chart		
	Chart Title:		Chart Title		
	*X-Axis Source:	ASSIGNED_TO_FULL_NAME	Y-Axis Label		
🐵 Program Management	X-Axis Label:		(Y Value) n		
🗄 Portfolio Management	*Y-Axis Source:	ASSIGNED_TO_FULL_NAME			
🗄 Financial Management	Y-Axis Label:				
🗄 Deployment Management	'Bubble Size	ASSIGNED TO FULL NAME			
⊞ Reports	Source:	ASSIGNED_TO_FUEL_NAME			
Administration	Bubble Size Label:				
Open Workbench	Color Source:	×	Tooltip		
Open Workbench on Desktc Edit My Profile	Color Label	×	n		
View My Resource Informal	Source:	¥	(X Value) N N N N N N		
Download Microsoft Project	Color Label:		X-Axis Label		
🗄 Demand Sets & Process	Tooltip Source:	~	Color Label		
Project Types & Templat			Color Label A 🦲 Color Label B 🛑 Color Label C		
Financials	Hyperlink Options:	No Hyperlink	• • •		
Program Processes		OHyperlink Source: ASSIGNED_TO_EMAIL	×		
Portfolio Management		Orilldown to Portlet: (None) Edit			
Time Management		(None) Earc			
⊞ Regions ⊕ Report Execution					
Report Execution     Portlet Definitions			Cancel 4 Back Next		
Configure Portlet Definitic					

Figure 3-10. Set up Display Options for bubble chart portlets

Table 3-7. Set up Display Options field descriptions for bubble chartportlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*X-Axis Source	Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source.
X-Axis Label	Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length).
*Y-Axis Source	Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source.
Y-Axis Label	Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length).

Field Name (*Required)	Description
*Bubble Size Source	Select the source column for the size of the bubble.
	Choices are limited to those columns available in your portlet data source.
	Specify the label for the bubble size.
Bubble Size Label	Type any alphanumeric string (up to 200 characters in length).
	Select the source for the color.
Color Source	See Selecting Portlet Colors on page 113 for details.
Color Label Source	Select the source for the labels associated with the colors.
	Specify the label for the legend.
Color Label	Type any alphanumeric string (up to 200 characters in length).
	Select the source column for the tooltip to be displayed when the cursor hovers over an item.
Tooltip Source	Choices are limited to those columns available in your portlet data source.
	Specify whether the column can be linked to another page or portlet.
	Choices include:
Hyperlink Options	<ul> <li>No Hyperlink. Links to other pages are not allowed.</li> </ul>
	• Hyperlink Source. Link to the selected column.
	<ul> <li>Drilldown to Portlet. Drill down to the selected portlet.</li> </ul>

Table 3-7. Set up Display Options field descriptions for bubble chartportlets (page 2 of 2)

### **Selecting Portlet Colors**

Most of the portlet types include the option to specify particular colors for a portlet. Unlike the default color map that selects and changes the colors seemingly at random, the colors you specify will always be used when the portlet is displayed.

To specify color mappings for a portlet requires configuration of the:

- Portlet data source
- Portlet definition

#### **Defining Color Maps in the Portlet Data Source**

To specify a color map for a portlet, refer to Chapter 2, *Creating and Maintaining Portlet Data Sources*, on page 19. In the section *Completing the Data Source Tab* on page 28, you will need to add (or modify) columns to specify the color map.

In general, color mappings:

- Should correspond to the column used in the Order By clause
- Can be indicated for one or more of the "order by" values
- Color can be specified by:
  - □ Name (such as LemonChiffon)
  - □ Hexadecimal code (for example, #FFFACD)

Names or codes are case-insensitive. That is, DarkGoldenRod is the same as DARKgoldenROD and #B8860B is the same as #b8860b.

Appendix A, *Color Names*, on page 159, provides a comprehensive list of color names and some recommendations about their use.

*Figure 3-11* shows examples of these settings in the **Select** section of the Select/From tab of the Query Definition window (see Chapter 2, *Creating and Maintaining Portlet Data Sources*, on page 19 for details about this window).

- The values for priority\_code column include the priorities associated with a request (of the type being displayed in this portlet):
  - □ Normal
  - □ Low
  - □ High
  - □ Critical
  - □ None
- The Display\_Order column ranks the values of the priority codes
- The Order By clause specifies the use of the Display\_Order column
- The Color column specifies the relationship of the colors to the "display order" as follows:
  - □ Wheat (by hexadecimal code) for Normal
  - MistyRose for Low
  - □ The default color for High (which means the color is subject to change)
  - □ CadetBlue for Critical
  - □ Tomato for None



You probably want to select colors that are meaningful to your organization and more practical than those selected for this example.

м	M Query Definition					
S	Select/From Where/Filter Group By/Order By					
	Select			1		
	You can use any Database columns or SQL expression to create columns for the SELECT portion of the query and enter the FROM portion directly.					
	Column Name	Column Type	Description	SQL		
	something1	Text	something1	something1		
	priority_code	Text	priority code	decode(priority_code,NULL,'None',priority_code,priority_code)		
	Color	Text	color	decode(priority_code,NULL,tomato','NORMAL',#F5DEB3','LOW','mistyrose','CRITICAL','CadetBlue)		
	Display_order	Text	order	decode(priority_code,NULL,1,'NORMAL',2,'LOW',3,'HIGH',4,'CRITICAL',5)		
Fr	Add Edt Remove					
	FROM somewhere					
μ				×		
	Enlarge					
M	here/Group By/Having/Order By	y Clauses:				
WHERE 1=1 group by priority_code order by display_order						
	View Full Query			OK Apply Cancel		

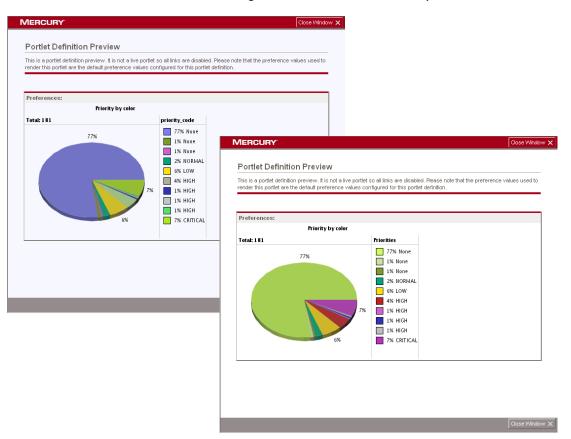
Figure 3-11. Color map in the portlet data source

#### **Specifying the Color Map in the Portlet Definition**

Once a portlet data source includes a color map, you can specify its use in a color specification–enabled portlet.

*Figure 3-12* shows a preview of a pie chart that uses the default color map along with a preview of the same pie chart approximately five minutes later. As you can see, the colors vary significantly.

As shown in *Figure 3-14*, specifying a color map can help establish consistency of the portlet coloration and, potentially, its interpretation.



#### Figure 3-12. Default color map

To specify use of a color map available in a portlet's data source, select the color map's column for the **Color Source** as shown in *Figure 3-13*.

MERCURY				SIGN OUT
IT Governance Center	Create A Request > Search 1	for a Portlet Definition to Configure > Search Results	Sector Portlet Definition > Create Portlet Definition	ion
Welcome, Admin User May 12, 2006 02:07:45 PM PD T Expand All Collapse All Dashboard Demand Management		finition (Pie Chart)       • 2. Enter Portlet Information       • 3. Set up Diepl       6. Add User Help	ay Options 🕨 4. Define Preferences	
🗄 Project Management	Data Source Mappi	ing to Chart		
⊕ Time Management	Select a data source colu	mn to map to each chart property:	Sample Pie Chart	
⊞ Resource Management	Chart Title:	Priority by color	Chart Title	
Program Management  Portfolio Management  Financial Management  Deployment Management  Administration  Product Information	Wedge Source: Wedge Size Source: Wedge Labet Color Source: Toollip Source: Hyperlink Options:	priority_code Total Total Priorities Color V No Hyperlink Hyperlink D Hyperlink Color Color Color Edite	Total: H (Wedge Source Value Tota)	Wedge Label           20% Wedge B           25% Wedge C           8% Wedge C           8% Wedge D           2% Wedge E
			Cancel <b>4</b> Back	Next )

Figure 3-13. Set up Display Options with color specification

The resulting preview is shown in *Figure 3-14* as well as a second preview displayed a few minutes later. Note that default colors, used for the for High priority wedges, vary for each source as well as over time.

Priority by color       tal: 181     priority_code       77%     77% None	ERCURY.		Close Window	v X	
is a portied definition preview. It is not a live portied so all links are disabled. Please note that the preference values used to <b>forencess:</b> <b>riet 19</b> <b>77%</b> None <b>1</b> % None	) and at Definition Drawiew				
der this portiet are the default preference values configured for this portiet definition.		ortlet so all links are disabled. Die	are note that the preference values used to		
Profeeduate and the profee					
Profeeduate and the profee					
Take 1 81	references:				
77%       0       7% None         15 None       15 None         15 None       15 None         15 None       15 None         15 S None       15 None         15 S None       15 None         15 S None       15 None         15 None       15 None         15 None       15 None         15 S None       15 None         15 S None       15 None         15 None       15 None </td <td></td> <td></td> <td></td> <td></td> <td></td>					
775       15 None         15 None       15 None         25 NorMAL       65 LOW         45 High       15 High         6 N       75 CRITICAL    Preferences:          Fierder this y coler    Tetal: 181        776    Pierter cole walks configured for this ported definition.          Preferences:         776         776         776         776         776         776         776         776         777	.tal: 181				
Perfet Definition Preview This is a portlet definition preview. It is not a live portlet so all links are disabled. Please note that the preference values used to render this portlet are the default preference values configured for this portlet definition. Preferences: Preferences: Totat 181 77% long 1% Nore 5% St. LOW 1% Nore 1	77%	_	MERCURY		Close Window
Profite Definition Preview. It is not a live portiet so all links are disabled. Please note that the preference values used to reader this portiet are the default preference values configured for this portiet definition. Preferences: Total 181 77% 15 None 15					
This is a portlet definition preview. It is not a live portlet so all links are disabled. Please note that the preference values used to render this portlet definition. This is a portlet definition preview. It is not a live portlet so all links are disabled. Please note that the preference values used to render this portlet definition. This is a portlet definition preview. It is not a live portlet so all links are disabled. Please note that the preference values used to render this portlet definition. This is a portlet definition preview. It is not a live portlet so all links are disabled. Please note that the preference values used to render this portlet definition.			Portlet Definition Preview	v	
Preferences: Preferences: Profity by color Total: 181 77% (RiticAL Preferences: Profity by color Total: 181 77% 1% None 1% None			This is a portlet definition preview. It is	not a live portlet so all links are disabled. Please note that	the preference values used to
Preferences: Profity by color Total: 181 77% None 1%			render this portlet are the default prefe	rence values configured for this portlet definition.	
OK     7% CRITICAL       Preferences:       Tetal: 181       Priority by color       Tetal: 181       77%       15% None       2% NORMAL       5% LOW       4% HiGH       15% HiGH       15% HiGH       15% HiGH					
Priority by color       Total: 1 81       77%       1 5% None       1 5% None       2 5% NORMAL       6% LOW       4% High       1 5% High			Preferences:		
77% 00ne 15% None 15% None 15% None 25% NORMAL 6% LOW 45% HIGH 15% HIGH 15% HIGH	0%	7% CRITICAL	Priority	oy color	
77% 15 None 15 None 25 NORMAL 55 LOW 45 HIGH 15 HIGH 15 HIGH 15 HIGH			Total: 181	priority_code	
15% None 25% NORMAL 5% LOW 45% HIGH 15% HIGH 15% HIGH 15% HIGH			77%	_	
25% NORMAL 5% LOW 45% HIGH 15% HIGH 15% HIGH 15% HIGH					
6% TX CRITICAL					
				6% 7% CRITICAL	

Figure 3-14. Differences in color mappings

# Creating and Maintaining Dashboard Pages and Modules

#### In This Chapter:

- About Dashboard Pages and Modules
  - Default Dashboard Page, Default Modules, and the Fallback Module
  - Preconfigured Dashboard Pages
- Searching for Modules
- Creating New Modules
- Copying Modules
- Modifying Modules
- Viewing Module Usage
- About Deleting Modules
- Deleting Unpublished Modules
- Deleting Published Modules
  - □ Using the Remove a Published Module Page
  - □ Using the Configure: <Module Name> Page
- Setting the Fallback Module

# **About Dashboard Pages and Modules**

#### **Default Dashboard Page, Default Modules, and the Fallback Module**

The default Dashboard page is the first Dashboard page seen when logging on to Mercury IT Governance Center. Users can have one and only one default Dashboard page. Other Dashboard pages are accessed from the **Dashboard** menu item, or from the **Switch to page** button available on any Dashboard page.

The default Dashboard page can be configured by application administrators and consists of either:

- Default modules. One (or more) specific modules assigned to users and security groups to help meet their business requirements. (These default modules can be ranked by importance.)
- Fallback module. The module designated for users and security groups who are not assigned any default modules.

Mercury provides a fallback module called Front Page.

Based on business requirements, application administrators may assign one or more default Dashboard modules using the **Configure as Default Module** section of the Create Module page (see *Creating New Modules* on page 124) or the Configure: *<Module Name>* page (*Modifying Modules* on page 132).

In the event no default Dashboard modules are needed, a fallback module should be assigned (see *Setting the Fallback Module* on page 141).

Modules are one or more Dashboard pages grouped together into a single entity and created, shared, and optionally managed, by an application administrator. Within a module, each Dashboard page can include personalized portlets configured to satisfy specific business needs.

Modules can be provided to users in the following ways. Specific details can be found in Chapter 5, *Providing Modules To Users*, on page 143.

- **Distributed.** When a module is distributed, those receiving the module can edit the Dashboard pages and portlets.
- Published. When a module is published, those receiving the module cannot edit the Dashboard pages or portlets.

- Made available as preconfigured Dashboard pages. When a module is made available as a preconfigured Dashboard page, users adding the module to their Dashboard can edit those Dashboard pages and portlets.
- Made the default Dashboard for users or groups. When a module is made a default Dashboard page, the module can be distributed or published.

#### **Rules for Creating Modules**

The following rules apply when creating any module:

- Must have a unique name
- Can contain one or more Dashboard pages, each with one or more portlets
- Can be published or distributed
- Can be made the default Dashboard pages for users and groups
- Can be made available as preconfigured Dashboard pages
- Cannot have its Dashboard pages and portlets published separately
- Can have its Dashboard pages and portlets distributed separately

#### **Preconfigured Dashboard Pages**

Preconfigured Dashboard pages are modules that users add to their own Dashboards. These pages are useful in situations where users routinely use the same (basic) page setup. These preconfigured Dashboard pages can be edited and personalized by users to increase their usefulness. Preconfigured Dashboard pages are either provided by Mercury or configured by application administrators or advanced users. Once a preconfigured Dashboard page is added to a Dashboard, that Dashboard page can be edited. These Dashboard pages must include at least one portlet.

Preconfigured Dashboard pages are added using the **Add Preconfigured Pages** button located on the Personalize Dashboard page. Once clicked, the Add Preconfigured Pages to Dashboard dialog box opens (see *Figure 4-1*).

Figure 4-1. Add Preconfigured Pages to Dashboard dialog box

MERCURY	Close Window
Add Preconfigure	d Pages to Dashboard
Click an item to select	
Preconfigured Pages	Description
Demand Manager	Contains the default set of portlets for an organization's Demand Manager.
Portfolio Manager	Contains the default set of portlets for a Portfolio Manager.
Fortfolio Manager	
Program Manager	Contains a list of portlets useful to a Program Manager.
	Contains a list of portlets useful to a Program Manager . Contains the default set of portlets for a manager of a team's demand.

The module's name appears in the **Preconfigured Pages** column and the module's description is listed in the **Description** column.

# **Searching for Modules**

To search for an existing module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears.

Configure Mo	t Definition to Configure > Search Resu odules lodule to Configure	<u>Its</u> > <u>Dashk</u>	oard - Front Page > <u>Person</u>	a <u>alize Dashboard</u> > Search fo	r a Module to	Configure
Search for a M						
	lodule to Configure					
	lodule to Configure					
Hanna starta						Reset Form
			Created By:	<u>_</u>		
with:	nodules that have changed since last		Last Updated From:	2	To:	9
publication	~		-			
			Last Published From:	2	To:	2
			Published to Users:	<u></u>		
Cort Pun		Deculto	Displayed Per Pager			
Soft by. Name		Results	Displayed rei rage.	50		
	<b>••</b>					
						Search
	publication	publication	publication Sort By: Name Sort By: Results	publication Last Published From: Published to Users: Sort By: Name Soft By: Name Accending 'Results Displayed Per Page:	publication Last Published From: Published From: Published to Users: Sort By: Name Scending 'Results Displayed Per Page: 50	publication Last Published From:  To: Published to Users: Sort By: Name SAscending 'Results Displayed Per Page: 50

3. Provide the search criteria using the information from the following table.

Field Name (*Required)	Description
	Specify a name for the module.
Name	Type any alphanumeric string (up to 255 characters in length).
Show only modules that have changed since last publication	Indicate whether to show only modules that have been modified since they were last published.
Created By	Select the user who created the module.
Last Updated From < <i>Date</i> > To < <i>Date</i> >	Select the date range when the module was last updated.
Last Published From <date> To <date></date></date>	Select the date range when the module was last published.
Published to Users	Select one or more users who may have the published module.

Field Name (*Required)	Description
Sort By	Select the sort criteria. Choices include: Name Last Updated On Last Published On
Ascending/Descending	Indicate the sorting sequence.
*Results Displayed Per Page	Specify the maximum number of search results to display on a page. Type any integer, including zero.



Click **Reset Form** if you would like to clear your current search criteria.

#### 4. Click Search.

The Configure Modules page is updated to include the search results which are displayed in the **Select a Module to Configure** section. If the list of results is long, click **Prev** and **Next** to navigate the list.

				SIGN OUT
	Search Results > Das	shboard - Front Page > <u>Personalize Dashboard</u> > <u>Search for a Module to Configure</u> > Search	n Results	
Welcome, Admin User Sep 29, 2006 02:42:34 AM PDT Last Login: 9/29/06 12:58 AM P Expand All Collapse All Dashboard		lules published to Users, and subsequently be maintained only by Administrators.(Users will no stributed to Users, for their individual personalization.	t be able to personaliz	te the content.)
Demand Management	Select a Module	s to Configure Sho	wing 1 to 7 of 7	Prev Next
Project Management	Name A		Last Updated	Last Published
Time Management	Name ∆	Description	On	On
Resource Management	Capital Exposure	Dashboard to display the state of capitalized costs in the current portfolio broken down by project.	July 24, 2006	**
Program Management	Demand Manager	Contains the default set of portlets for an organization's Demand Manager.	July 24, 2006	**
	Portfolio Manager	Contains the default set of portlets for a Portfolio Manager.	July 24, 2006	**
Portfolio Management	Program Manager	Contains a list of portlets useful to a Program Manager.	July 24, 2006	**
Financial Management	Standard ITG Dashboard	Standard ITG Dashboard	July 24, 2006	**
Deployment Management	Team Manager	Contains the default set of portlets for a manager of a team's demand.	July 24, 2006	**
Reports	Time Management	Contains portlets for a new Time Management user.	July 24, 2006	**
Open Workbench	Search for a Mo	dula ta Canfigura		
Open Workbench on Desktc Edit My Profile View My Resource Informal	Name starts	Created By:	8	Reset Form
Open Workbench on Desktc Edit My Profile View My Resource Informal Download Microsoft Project	Name starts with:	Created By:		
Open Workbench on Desktc Edit My Profile View My Resource Informal Download Microsoft Project Demand Sets & Process	Name starts with:		A P To:	
Open Workbench on Deskto Edt My Profile View My Resource Informat Download Microsoft Project Demand Sets & Process Project Types & Templat	Name starts with:	Created By:		
Open Workbench on Desktc Edit My Profile View My Resource Informal Download Microsoft Project Demand Sets & Process Project Types & Templat Financials	Name starts with:	Created By: Cules that have changed since last Last Updated From: Last Published From:	열 To: 열 To:	2
Open Workbench on Desktc Edit My Profile View My Resource Informal	Name starts with:	Created By:	🕒 To:	 
Open Workbench on Deskt Edit My Profile View My Resource Informal Download Microsoft Project Demand Sets & Process Project Types & Templat Financiale Program Processes Portfolio Management	Name starts with:	Created By: Cules that have changed since last Last Updated From: Last Published From:	열 To: 열 To:	2
Open Workbench on Desktc Edit My Profile View My Resource Informat Download Microsoft Project Point Types & Templat Project Types & Templat Project Types & Templat Project Types & Templat Profilo Management Regions	Hame starts with: Show only more publication	Created By:       dules that have changed since last       Last Updated From:       Last Published From:       Published to Users:	열 To: 열 To:	 
Open Workbench on Deskt Edit My Profile View My Resource Informal Download Microsoft Project Demand Sets & Process Project Types & Templat Financials Program Processes Portfolio Management Time Management Regions Regions	Hame starts with: Show only more publication	Created By:         dules that have changed since last         Last Updated From:         Last Published From:         Published to Users:         Image: Solution of Sol	열 To: 열 To:	2
Open Workbench on Desido Edit My Profile View My Resource Informal Download Microsoft Project Demand Sets & Processe Project Types & Templat Financials Program Processes	Hame starts with: Show only more publication	Created By:         dules that have changed since last         Last Updated From:         Last Published From:         Published to Users:         Image: Solution of Sol	열 To: 열 To:	 

From the Configure Modules page you can:

- Select a module. In the Select a Module to Configure section, click the link associated with the desired module.
- Change the default Dashboard modules. In the Select a Module to Configure section, click Configure Default Modules.
- **Refine your search.** In the **Search for a Module to Configure** section, provide the search criteria detailed in step 3 on page 123.

# **Creating New Modules**

To create an entirely new module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Create a Module.

The Create Module page appears.

- 3. (Optional) At any time, you can click one of the following to discard your changes:
  - Your browser's **Back** button
  - Any breadcrumb
  - Any menu item

MERCURY	SIGN OUT
	Dashboard - Front Page > Create Module
Welcome, Admin User Oct 3, 2006 11:39:20 PM PDT Last Login: 10/3/06 11:07 PM P Expand All Collapse All	Create Module
🗄 Dashboard	
🗄 Demand Management	'Module Name:
🗄 Project Management	Woulde name:
🗄 Time Management	Description:
Resource Management	Enabled: 💿 Yes 🔿 No
🗄 Program Management	Add Blank Page Add a User's Pages
Portfolio Management	
	Page New Page         Switch to page ▼         Delete Page         Reorder Pages
🗄 Deployment Management	
Reports	Add Portlets Automatically refresh this page every 60 minutes
Administration	Click and drag to select and move portlets
Open Workbench Open Workbench on Desktc Edit My Profile	Drag outside box to cancel movement
View My Resource Informal Download Microsoft Project	Selected Portlet: Copy Move to Page: Move
<ul> <li>Demand Sets &amp; Process</li> <li>Project Types &amp; Templat</li> </ul>	
Financials	Configure Access
🕀 Program Processes	Administrator Access
🕀 Portfolio Management	Users specified below will have access to modify this Module.
Time Management	Security Type Hame
	All Users
Portlet Definitions	Give Access to: User 🖌 📓 Add
Configure Modules	Set As Default Module
Distribute a Module Remove a Published Moc	The following users/groups will get this module as a default view upon first Login:
Configure Default Module	Security Type Ilame No Users
Create a Module	Add Users: User V Add
	As Published content (Maintained only by Administrators, can be updated later via publishing)
	As Distributed content (No Administrator control)
	Self-Service Access
	Allow Users to add this module to their own Dashboards as Preconfigured Pages.
	Allow access to the following users and groups:
	Security Type Name
	All Users
	Give Access to: User 🕑
	Create

- 4. In the Module Name field, type the name of the module.
- 5. (Optional, although highly recommended) In the **Description** field, type a brief description of the module.
- 6. Configure the module's Dashboard pages and portlets.

You can perform the following procedures:

- Add blank Dashboard pages to the module
- Add a user's Dashboard pages to the module
- Name or rename Dashboard pages in the module

- Delete or reorder Dashboard pages in the module
- Set the automatic refresh for a Dashboard page in the module
- Add, delete, copy, or move portlets on a Dashboard page
- Move portlets to another Dashboard page
- Make portlets narrow or wide
- Set the rows displayed on portlet views
- 7. (Optional) Personalize the portlets added to a module's Dashboard pages.

Portlets added to a module's Dashboard pages can be personalized to show specific and relevant information. A portlet is customized using the portlet's edit page and depending on capabilities of the portlet, the Advanced Defaults dialog box. To personalize a portlet:

a. Click the desired portlet's Edit icon (shown as a pencil).

The Edit Preferences: *<Portlet Name>* page appears.

MERCURY					SIGN OUT
			Search for a Module to Configure > Search Results > Edi		
Welcome, Admin User Sep 29, 2006 02:44:45 AM PDT Last Login: 9/29/06 12:58 AM P Expand All Collapse All	Edit Preferences: Capitalize Timelines)	d Proje	ct Timelines (Capitalized Project	Advanced Defaults	Change Title
🗄 Dashboard				Done	Cancel
🗄 Demand Management					
🗉 Project Management	Preferences				
🗄 Time Management	Project Name:				
🗉 Resource Management	Project Manager:	2	Business Objective:		
🗉 Program Management	Project Status:		Project Health:		
	Start Date From:	2	Start Date To:		
🗉 Financial Management	Complete Date From:	21	Complete Date To:		
Deployment Management	Min Planned Capital:		Min Carrying Value:		
Heports	Min Planned Cost:		Min Actual Cost:		
Administration					
Open Workbench Open Workbench on Desktc Edit My Profile View My Resource Informal	'Rows Displayed: 'Rows Displayed in Maximized View:	5 25			
Download Microsoft Project Demand Sets & Process				Done	Cancel
🗄 Portfolio Management					
Time Management     Degiana					
Portlet Definitions					
🖃 Modules					
Configure Modules Distribute a Module					
Remove a Published Moc					
Configure Default Module					
Create a Module					
Product Information					



The contents of the page may differ depending on the portlet chosen.

- b. In the **Preferences** section, type data in the appropriate fields.
- c. If applicable, click Advanced Defaults.

The Advanced Defaults dialog box appears.

MERCURY	Close Window (
Advanced Defaults	
When this portlet is distributed as part of a Module, the following prefer to the identity of the user who is receiving the Module.	rences will be set
Assigned To:	
Created By:	
Created in the Last X Days:	
Eligible for My Action?	
Escalation Level:	
Include Closed?	
Not Updated in Last X Days:	
Priority:	
Program Name:	
Project:	
Status:	
Updated in the Last X Days:	
Done	Cancel
	Close Mindow

The Advanced Defaults dialog box allows you to set the preference fields that are evaluated dynamically when using **Advanced Defaults** fields. For example, the User ID (user property) is assigned as a default value to the field **Assigned To**. When the portlet is viewed, the data assigned to the current user is viewed.

d. Click Done.

The Advanced Defaults dialog box closes.

e. Click Done.

- 8. (Optional) To configure the module as a default module use the **Configure As Default Module** section:
  - a. In the Add Users field, select the category of users.
    - User. Specific users are given access to add the portlet to their Dashboard page.
    - **Group.** Specific groups are given access to add the portlet to their Dashboard page.
  - b. In the field to the right of the **Add Users** field, select one or more users or groups from the list of those having the appropriate product license.
  - c. Indicate how the module should be provided.
    - Published. Users cannot configure or delete the module or its contents. Only an Administrator can configure or delete the module. To publish the default module, select the As Published content (Maintained only by the Administrators, can be updated later via publishing) option.
    - Distributed. Users can configure and delete the module and its contents. To distribute, select the As Distributed content (No Administrator control) option.
  - d. Click Add.
  - e. To add another user or group, repeat step 8 on page 128.
- 9. (Optional) To configure the module as a preconfigured module use the **Configure Self-Service Access** section:
  - a. Select Allow users to add this module to their own Dashboards as Preconfigured Pages.
  - b. In the Give Access to field, select the category of users.
    - User. Specific users are given access to add the portlet to their Dashboard page.
    - **Group.** Specific groups are given access to add the portlet to their Dashboard page.
  - c. In the field to the right of the **Give Access to** field, select one or more users or groups from the list of those having the appropriate product license.

- d. Click  $\boldsymbol{\mathsf{Add.}}$
- e. To add another user or group, repeat step 9 on page 129.
- 10. Once the module is correctly configured, click **Create**.

The Create Module page is updated.

MERCURY	SIGN OUT
	Dashboard - Front Page > Personalize Dashboard > Search for a Module to Configure > Search Results > Dashboard
Welcome, Admin User Sep 29, 2006 02:50 31 AM PD Last Login 0:2006 12:56 AM P Expand All <u>Collapse All</u> B Dashboard B Demand Management B Project Management	Create Module Sample Module Configure Sample Module Distribute this Module Configure Module Search for other Modules to Configure Search for other Modules to Configure
∃ Time Management	
Resource Management	
IP Program Management	
Portfolio Management	
Financial Management	
E Deployment Management	
E Reports	
Administration Open Workbench Open Workbench on Deskte Edt My Profile View My Resource Informal Download Microsoft Project 9 Project Types & Templat 9 Project Types & Templat 9 Profy Dypes & Templat 9 Portfolio Management 9 Time Management 9 Portfolio Management 9 Portfolio Management 9 Portfolio Management 9 Portfolio Menagement 9 Portfolio	

- 11. Review the page and verify that the module was created.
- 12. (Optional) Select the link of your choice.

# **Copying Modules**

To copy an existing module and use it as the basis for a new module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears, as shown in step 2 on page 122.

3. Search for and select a module.

For complete information on how to search for and select modules, see *Searching for Modules* on page 122.

The Configure: *Module Name>* page appears, as shown in step 3 on page 132.

4. Click Copy.

The Copy Module: *<Module Name>* page appears.

MERCURY	SIGN OUT	r i
	Search Results > Search for a Module to Configure > Search Results > Configure Module: Portfolio Manager > Create Module	
Welcome, Admin User Sep 29, 2006 02:51:30 AM PDT Last Login: 9/29/06 12:58 AM P	Copy Module: Portfolio Manager	
Expand All Collapse All	Create	
🗄 Dashboard		
Demand Management	Module Name: Sopy of Portfolio Manager	
Project Management		
🗄 Time Management		
Resource Management	Enabled: 💿 Yes 🔘 No	
🗄 Program Management	Add Blank Page Add a User's Pages	
Portfolio Management		
🗉 Financial Management	'Page Ilame:     Portfolio Manager     Switch to page ▼     Delete Page     Reorder Pages	
🗄 Deployment Management	Add Portlets Automatically refresh this page every minute	es
Reports		
Administration	Click and drag to select and move portlets	
Open Workbench Open Workbench on Desktc	Drag outside box to cancel movement	
Edit My Profile View My Resource Informal	Current Portfolio	
Download Microsoft Project Demand Sets & Process	Portfolio By Business Obj 📼 🖾 Resource By Business Obj 🖅 📼 🕱	
🕀 Project Types & Templat		
Portfolio Management	Selected Portlet: Copy Move to Page: Move	
Time Management	activitient of the copy more consistent of the copy	
		_
Portlet Definitions	Configure Access	
Configure Modules	Administrator Access	
Distribute a Module	Users specified below will have access to modify this Module. Security Type Ilame	
Remove a Published Moc Configure Default Module	All Users	
Create a Module	Give Access to: User 🗸 📓 Add	
Product Information		
	Set As Default Module	
	The following users/groups will get this module as a default view upon first Login:           Security Type         Name	_
	No Users	_
	Add Users: User 🔽 🖳 Add	
	• As Published content (Maintained only by Administrators, can be updated later via publishing)	
	As Distributed content (No Administrator control)	
	Self-Service Access	
	Allow Users to add this module to their own Dashboards as Preconfigured Pages.	
	Allow access to the following users and groups:	
	Security Type Hame	
	All Users Give Access to: User V Add	
	Create	

- 5. (Optional) At any time, you can click one of the following to discard your changes:
  - Your browser's Back button
  - Any breadcrumb
  - Any menu item
- 6. In the Module Name field, type the name for the *new* module.
- 7. Change the settings of the module as desired.

For information about the available settings, see *Creating New Modules* on page 124.

8. Click Create.

#### **Modifying Modules**

To change an existing module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears, as shown in step 2 on page 122.

3. Search for and select a module.

For detailed instructions on how to search for and select modules, see *Searching for Modules* on page 122.

The Configure: *<Module Name>* page appears.

MERCURY	SIGH OUT
	Dashboard - Front Page > Create Module
Welcome, Admin User Oct 3, 2006 11:39:20 PM PDT Last Login: 10/3/06 11:07 PM P Expand All Collapse All	Create Module
Demand Management	'Module Hame:
Project Management	
🗉 Time Management	Description:
🗄 Resource Management	Enabled:
🗄 Program Management	Add Blank Page Add a User's Pages
Portfolio Management	
	Page Hame: New Page Switch to page  Delete Page Reorder Pages
Financial Management	
Deployment Management	Add Portlets Automatically refresh this page every 80 minutes
Reports	
Administration	Click and drag to select and move portlets
Open Workbench Open Workbench on Desktc Edit My Profile	Drag outside box to cancel movement
View My Resource Informal Download Microsoft Project	Selected Portlet: Copy Move to Page: Move
🕀 Demand Sets & Process	
🕀 Project Types & Templat	Configure Access
Financials	Administrator Access
Time Management	Users specified below will have access to modify this Module.
Regions	Security Type IIame All Users
Report Execution	
Portlet Definitions	Give Access to: User 🖌 🧟 Add
🗆 Modules	
Configure Modules	Set As Default Module
Distribute a Module Remove a Published Moc	The following users/groups will get this module as a default view upon first Login:
Configure Default Module	Security Type Hame
Create a Module	No Users
Product Information	Add Users: User 🖌 📓 Add
	As Published content (Maintained only by Administrators, can be updated later via publishing)
	C As Distributed content (No Administrator control)
	Self-Service Access
	Allow Users to add this module to their own Dashboards as Preconfigured Pages.
	Allow access to the following users and groups:
	Security Type Name
	All Users
	Give Access to: User V
	Create

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

- Change the contents of a module, see *Creating New Modules* on page 124.
- Save the changes made to a module and automatically load the module into the Distribute a Module page, see Chapter 5, *Providing Modules To Users*, on page 143.
- View the usage of the module page, see *Viewing Module Usage* on page 134.
- Copy the module, see *Copying Modules* on page 130.

- Remove a published module, see *Deleting Published Modules* on page 136.
- Remove the module, see *Deleting Unpublished Modules* on page 135.

#### **Viewing Module Usage**

To view the usage of published modules:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears, as shown in step 2 on page 122.

3. Search for and select a module.

For complete information on how to search for and select modules, see *Searching for Modules* on page 122.

The Configure: *Module Name>* page appears, as shown in step 3 on page 132.

#### 4. Click View Module Usage.

The View Module Usage dialog box opens.

/IERCURY				Close Window (
iew Module Usage -	The following users current	ly have this module <b>publish</b>	ed to their dashboards.	
Module Users: (	Corporate%20HR%20P	age	Showing 1 to 3 of 3	Prev Next
Module Users: ( First Name	Corporate%20HR%20P Last Name	age Username	Showing 1 to 3 of 3 Email Address	Prev Next
			Ť	Prev Next
First Name	Last Name	Username	Email Address	Prev Next

View Module Usage lists the users who currently have the module published to their Dashboards. Click **Prev** and **Next** to navigate the list of results.

Tip

Remember to close the View Module Usage dialog box when you are done.

#### **About Deleting Modules**

Situations may arise when you want to remove a *published* module that is no longer useful. For example, suppose you created a module to track specific information concerning a project. The module was then published to all members of the project team. Once the project is over, you want to remove the module from the Dashboards of all the members of the project team. The Remove Published Module wizard enables you to do so.

The differences between distributed and published modules that should be considered when removing modules from a user's Dashboard include:

- Distributed modules cannot be removed by the application administrator or advanced user.
- Published modules can be removed by the application administrator or advanced user.
- Published modules are overwritten by updated versions of the published module.

### **Deleting Unpublished Modules**

To delete an existing, unpublished module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears, as shown in step 2 on page 122.

3. Search for and select a module.

For complete information on how to search for and select modules, see *Searching for Modules* on page 122.

The Configure: *<Module Name>* page appears, as shown in step 3 on page 132.

4. Click Delete.

A confirmation dialog box opens.

5. Click **OK**.

The confirmation dialog box closes and the module is deleted.



For more information concerning the deletion of a module, see *Using the Remove a Published Module Page* on page 136.

# **Deleting Published Modules**

Modules can be deleted using the two techniques described in the following sections.

#### Using the Remove a Published Module Page

To remove a module from a user's Dashboard:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Remove a Published Module.

The Remove Published Module page appears.

MERCURY	SIGH OUT
	Configure Module: Capital Exposure > Configure Module: Demand Manager > Configure Module: Standard ITG Dashboard > Configure Module: Time Management > Remove Published Module
Welcome, Admin User Sep 29, 2006 02:54:03 AM PDT Last Login: 9/29/06 12:58 AM P	Remove Published Module
Expand All Collapse All	
🗄 Dashboard	Select Module to Remove
🗉 Demand Management	
🗄 Project Management	'Module:
🗄 Time Management	Remove Module from the following users
🗄 Resource Management	Module will be removed from users belonging to any of the following selections:
🗄 Program Management	Remove publication from all current users Groups:
🗄 Portfolio Management	Users: Org Units: 🔢
🗄 Financial Management	Note: If the selected users do not have this module published to their dashboards, they will not
🗄 Deployment Management	be included in the impacted users list.
• Reports	Notify Users of Publication Removal
Administration Open Workbench Open Vorgen Project Types & Templat Fringent Project Types & Templat Fringen Project Types & Templat Project Types & Templat Fringen Fri	□ Send the following email at the time of removal:         To:       All impacted users selected above, who have valid email addresses in the system.         ✓ Send as BCC         'From:       Impacted users are selected above, who have valid email addresses in the system.         ✓ Send as BCC         'From:       Impacted users are selected above, who have valid email addresses in the system.         ✓ Send as BCC         'From:       Impacted users are selected above, who have valid email addresses in the system.         CC:       Impacted users are selected above, who have valid email addresses are selected users are selected above, who have valid email addresses in the system.         'Stubject:       Impacted users are selected above, who have valid email addresses are selected above, who have valid email addresses are selected above, who have valid email addresses in the system.         'Message Format:       Plain Text Impacted above, who have valid email addresses are selected above, who have valid email addresseses are selected above, who have valid ema
Product Information	~
	Continue Cancel

- 3. In the **Module** field, select the name of the module.
- 4. In the **Remove Module from the following users** section, provide the removal criteria using the information from the following table.

Field Name	Description
Remove publication from all current users	Indicate whether the module should be removed from all current users.
Groups	Select one or more groups for which the module should be removed.
Users	Select one or more users for which the module should be removed.
Org Units	Select one or more organization units for which the module should be removed.

5. In the **Notify Users of Publication Removal** section, provide the notification details using the information from the following table.

Field Name (*Required)	Description
Send the following email at the time of removal	By default, all impacted users of the module removal are sent the email. Indicate whether the notification should be sent to only the users specifies in the remainder of this section.
Send as BCC	Indicate whether each user sees only their own email address.
*From	Select the user whose email address is to be used as the sender of the message.
Reply To	Select the user whose email address should be used for replies.
сс	Select one or more users who should also be notified.
BCC	Select one or more users who should also be notified and hide their email addresses from the members of the distribution list.
*Subject	Specify the title or subject of the email. Type any alphanumeric string. The maximum length of the string is based on your email application.
Message Format	Select the format of the message. Choices are: Plain Text Html
*Message Body	Specify the message to be sent. Type any alphanumeric string. The maximum length of the string is based on your email application.

#### 6. Click Continue.

The Remove Published Module confirmation page appears.

ERCURY				s
Governance Center	Search for a Module to Configure > Sear	ch Results > Configure Module: Corporate		
Remove Published	l Madula			
The following Module will be	removed from the dashboards of users list	ed below: Change		
Confirm Publication F	Removal			
Publication Content t	o be removed			
Module: Capital Exposure				
Dashboard Page	Contains Port	ets		
Capital Exposure	Capitalized Proje	ct Timelines		
	Impairment Risks			
	Total Exposure			
	Capitalized Proje	ct Breakdown		
Impacted Users				
First Name	Last Name	Username	Email Address	
Tracy	Wilcox	tracywilcox	tinawilcox@company.com	
Sara	Smith	sarasmith	sarasmith@company.com	
Janet	Ortez	jortez	jortez@mercury1.com	
Martha	Greenbaum	marthagreenbaum	marthagreenbaum@company.com	
Sam	Smith	samsmith	samsmith@company.com	
Tim	Wilcox	timwilcox	timwilcox@company.com	
Hane	l onez	hlonez	blonez@bycome.com	
			Showing 1 to 48	5 of 45 : <u>View F</u>
Email Notification				
The following email will be se	nt to impacted users at the time of distribution	1		
From: Jane Smith				
Reply To: Jane Smith				
CC:				
Subject: Capital Exposur	re Page Removal			
Message: (Format:Plain Te	ext)			
Your Capital Exposure Dashb	oard Page is being removed.			
			Remove	Cancel

In the **Publication Content to be removed** section, review the module information and correct as necessary.

7. In the **Impacted Users** section, review the list of users and correct as necessary.

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

8. In the **Email Notification** section, review the email information and correct as necessary.

9. Click Remove.

The Publication Removal Status dialog box appears.

MERCURY	Close Window (
Publication Removal Status	
Publication removal was Successful.	

If the removal was successful, the module is removed from the Dashboard of the impacted users and, if applicable, the email is sent to the list of impacted users.



Remember to close the Publication Removal Status dialog box when you are done.

#### Using the Configure: < Module Name> Page

To remove a published module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears, as shown in step 2 on page 122.

3. Search for and select a module.

For complete information on how to search for and select modules, see *Searching for Modules* on page 122.

The Configure: *Module Name>* page appears, as shown in step 3 on page 132.

4. Click Remove Published Module.

The Remove Published Module page appears, as shown in step 2 on page 136.

For the remaining instructions, see *Using the Remove a Published Module Page* on page 136.

#### **Setting the Fallback Module**

Every user must have a default Dashboard page. Those users with no default modules are assigned a fallback module as their default Dashboard page.

To create a fallback module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Default Modules.

The Configure Default Module page appears.

IERCURY	SIGN OUT
Governance Center	Search for a Module to Configure > Search Results > Configure Module: Timeloop Module > Configure Module: Switchback Module > Set Default Dashboard
Configure Default I	Nodules
	nore modules configured as his default deshboard for when he first logs in to IT Governance. The modules configured as default deshboard views has a total igned with any default deshboard, the fallback module will be chosen as his default deshboard. fule:
'Module: Standard ITG Da	shic II
This module will serve as the	fallback dashboard view:
🔘 As Publis	hed content (Maintained only by Administrators, can be updated later via publishing)
	uted content (No Administrator control)
Configure Default mo	dule ordering
Configure Default mo Default dashboard total orderi Timeloop Module Switchback Module	
Configure Default mo Default dashboard total orderi Timeloop Module Switchback Module Marketing Module	dule ordering ng - Top module get highest priority.
Configure Default mo Default dashboard total orderi Timeloop Module Switchback Module	dule ordering ng - Top module get highest priority.
Configure Default mo Default dashboard total orderi Timeloop Module Switchback Module Marketing Module	dule ordering ng - Top module get highest priority.
Configure Default mo Default dashboard total orderi Timeloop Module Switchback Module Marketing Module	dule ordering ng - Top module get highest priority.
Configure Default mo Default dashboard total orderi Timeloop Module Switchback Module Marketing Module	dule ordering ng - Top module get highest priority.

- 3. In the Module field, select a module.
- 4. Indicate how the module should be provided.
  - Published. Users cannot configure or delete the module or its contents. Only the Administrator can configure or delete the module. To publish the fallback module as the default Dashboard page, select the As
     Published content (Maintained only by the Administrators, can be updated later via publishing) option.
  - Distributed. Users can configure and delete the module and or its contents. To distribute the fallback module as the default Dashboard module, select the As Distributed content (No Administrator control) option.

5. (Optional) Rearrange the order of the modules as desired.

Mercury IT Governance Center allows users and groups to have multiple default modules. When users or groups have multiple default modules, a ranking order of the default modules must be established to determine the default Dashboard page.

In the **Configure Default module ordering** section, use the up- and down-pointers to order the default modules from highest priority at the top to the lowest priority at the bottom.

6. Click Done.

# Chapter 55 Providing Modules To Users

#### In This Chapter:

- Differences Between Publishing and Distributing Modules
- Publishing Modules
   Overview of Publishing Rules
  - **Using the Module Distribution Wizard**
  - □ Using the Configure: <Modules Name> Page
- Distributing Modules
  - Overview of Rules for Distributed Modules
  - Using the Module Distribution Wizard
  - □ Using the Configure: <Modules Name> Page

# **Differences Between Publishing and Distributing Modules**

Application administrators can configure and provide modules to users using either "published" or "distributed" modules. The decision whether to use published or distributed modules is based on the differences detailed in the following table. Use the procedures described in the following sections to implement your choice.

Action	Published Modules	Distributed Modules
Module can be added by	Application administrator only	Application administrator only
Module can be edited by	Application administrator only	User only
Module can be deleted by	Application administrator only	User only
Page includes this identification	Publication	(No unique identification)
When module is added	Page Update icon appears	Page Update icon appears
When module is updated	Page Update icon appears	(No icon appears)

#### Table 5-1. Published and distributed module differences



The **Page Update** icon appears as a small orange-colored square preceding the title of the Dashboard page in the list of Dashboards available from the **Switch to page** button.

# **Publishing Modules**

#### **Overview of Publishing Rules**

Published modules comply with the following rules:

- Cannot have their Dashboard pages and portlets published separately
- Cannot have their Dashboard pages and portlets edited or removed by the owner of the Dashboard
- Are tracked by the system
- Can only be removed by the application administrator
- Are overwritten by updated versions of the same published module

# **Using the Module Distribution Wizard**

Use the Module Distribution wizard to publish modules.

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Distribute a Module.

The Setup Content step of the Distribute or Publish a Module page appears.

MERCURY		SIGN OUT
	Dashboard - Front Page > Distribute Module	
Welcome, Admin User Oct 4, 2006 01:17:07 AM PDT Last Login: 10/4/06 12:38 AM P	Publish a Module	
Expand All Collapse All	1. Setup Content 🕨 2. Choose Users 🕨 3. Preview	
🗄 Dashboard		
🗄 Demand Management	Select Recipients of Publication	
🗄 Project Management	Module content will be sent to users belonging to any of the following selections	
∃ Time Management	Users: Org Units:	
⊞ Resource Management	Groups: Users with the following	
🗄 Program Management	Published Modules:	
🗄 Portfolio Management	Note: If the selected Module has changed since it was last published, users who	
🗄 Financial Management	aiready have it will automatically receive this publication	
Deployment Management	Notify Users of Publication	
E Reports	Send the following email at the time of publication:	
Administration Open Workbench Open Workbench on Deskt Edd My Profile View My Resource Informal Download Microsoft Project Demand Sets & Process Project Types & Templat Financials Program Processes Portfold Management Begions Portfold Management Regions Portfold Definitions Portfold Definitions Modules Distribute & Module Remove a Published Moc Configure Default Module Create a Module	To: All impacted users selected above, who have valid email addresses in the system.	
Product Information	Cancel ( Back Hext )	1

- 3. In the Module field, select the name of the module to be published.
- 4. Select Publish entire Module (Administrator controlled).

#### 5. Click Next.

The Choose Users step of the Publish a Module page appears.

MERCURY		SIGN OUT
	Dashboard - Front Page > Distribute Module	
Welcome, Admin User Oct 4, 2006 01:17:07 AM PDT Last Login: 10/4/06 12:38 AM P	Publish a Module	
Expand All Collapse All	1. Setup Content   2. Choose Users   3. Preview	
⊞ Dashboard		
Demand Management	Select Recipients of Publication	
Project Management	Module content will be sent to users belonging to any of the following selections	
🗄 Time Management	Users: Org Units:	
🗄 Resource Management	Groups: Users with the following	
🗄 Program Management	Published Modules:	
🗄 Portfolio Management	Note: If the selected Module has changed since it was last published, users who	
🗉 Financial Management	already have it will automatically receive this publication	
Deployment Management	Notify Users of Publication	
	Send the following email at the time of publication:	
Administration	All imported users calented above, who have valid amail addresses in the	
Open Workbench	To: System.	
Open Workbench on Desktc	Send as BCC	
Edit My Profile		
View My Resource Informat Download Microsoft Project	'From:	
Demand Sets & Process	Reply To:	
🗄 Project Types & Templat	cc:	
Financials		
🕀 Program Processes		
🗄 Portfolio Management	*Subject:	
🗄 Time Management	Message Format: Plain Text 🗸	
Regions	'Message Body:	
Report Execution		
Portlet Definitions		
Modules		
Configure Modules Distribute a Module		
Remove a Published Moc		
Configure Default Module		
Create a Module		
	Cancel ┥ Back Hext 🕨	
	outon to bus now y	

6. In the **Select Recipients of Publication** section, select the users and groups to receive the module.

At least one entry in one field is required. Note that users who are selected multiple times receive only one published module.

Field Name	Description	
Users	Select one or more users.	
Groups	Select one or more groups.	
Org Units	Select one or more organization units.	
Users with the following Published Modules	Select one or more modules.	

7. (Optional) In the **Notify Users of Publication** section, provide the notification details using information from the following table.

Field Name (*Required)	Description		
Send the following email message at the time of publication	By default, all recipients of the publication are sent the email. Select this option to enable notification and populate the <b>To</b> field with the users specified in step 6.		
Send as BCC	Indicate whether each user sees only their own email address.		
*From	Select the user whose email address is to be used as the sender of the message.		
Reply To	Select the user whose email address should be used for replies.		
сс	Select one or more users who should also be notified.		
BCC	Select one or more users who should also be notified and hide their email addresses from the members of the distribution list.		
*Subject	Specify the title or subject of the email message. Type an alphanumeric string. The maximum length of the string is based on your email application.		
Message Format	Select the format of the message. Choices include: Plain Text Html		
*Message Body	Specify the email message text to be sent. Type an alphanumeric string. The maximum length of the string is based on your email application.		

#### 8. Click Next.

The Preview step of the Publish a Module page appears.

MERCURY					SIGN OUT
	Dashboard - Front Page	> Distribute Module			
Welcome, Admin User Oct 4, 2006 01:19:34 AM PDT Last Login: 10/4/06 12:38 AM P	Publish a Modul	e			
Expand All Collapse All	1. Setup Content 🕨 2.	Choose Users > 3. Preview	i		
🗄 Dashboard					
Demand Management	Preview Publication	on			
🗄 Project Management	Publication Conte	nt			
Time Management	Module: Sample Module				
	Dashboard Page	Conta	nins Portlets		
Resource Management	New Page	<no po<="" td=""><td>ortlets&gt;</td><td></td><td></td></no>	ortlets>		
🗄 Program Management	Sample Page		nment Queue		
🗄 Portfolio Management			t by Project Class		
Financial Management		Analy.	ze Resource Pools		
Deployment Management	Impacted Users				
Reports	First Name	Last Name	Username	Email Address	Groups
Administration	Pamela	Stewart	pstewart	pstewart@acme.com	ITG User
Open Workbench	Larry X.	Veach	byeach	Ixveach@acme.com	ITG User ; Time Loggers
Open Workbench on Desktc	Benjamin U.	Cason	bucason	bucason@acme.com	ITG User
Edit My Profile	David	Jones	djones	Sababbi (@abino.com	ITG All Access Grants
View My Resource Informal	Davia	00103	ajones		ITO All Access oralits
Download Microsoft Project					
Demand Sets & Process					
Project Types & Templat					4 impac
Financials					4 mpac
Program Processes	Email Notification				
Portfolio Management					
Time Management	No email notification will b	e sent upon Publication			
Regions					
Report Execution					
Portlet Definitions				Cancel 4 Back	Hext Fin
Configure Modules					
Distribute a Module					
Remove a Published Moc					
Configure Default Module					
Create a Module					
Product Information					
<					

- 9. In the **Publication Content** section, review the module information and correct as necessary.
- 10. In the **Impacted Users** section, review the list of users and correct as necessary.
- 11. In the **Email Notification** section, review the email information and correct as necessary.

12. Click Finish.

The Module Publication Status page appears.

• A status bar is displayed in the event the publication of the module is taking longer than expected.

MERCURY	Close Window X
Module Publication Status	
Publication in progress	
42% Complete	

 If the publication was successful, the Module Publication Status page is updated as follows.

MERCURY	Close Window 🗙
Module Publication Status	
Publication was Successful.	

- If the publication was not successful, the list of users not receiving the module is shown on the Module Publication Status page.
- 13. Close the Module Publication Status dialog box.
- 14. (Optional) From the updated Publish a Module page, select the link of your choice.

# Using the Configure: < *Modules Name*> Page

To distribute an existing module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears, as shown in step 2 on page 122.

3. Search for and select a module.

For complete information on how to search for and select modules, see *Searching for Modules* on page 122.

The Configure: *<Module Name>* page appears, as shown in step 3 on page 132.

#### 4. Click Save and Distribute.

The Distribute or Publish a Module page appears.

MERCURY	SIGN OUT
	Dashboard - Front Page > Distribute Module
Welcome, Admin User Oct 4, 2008 01:13:20 AM PDT Last Login: 10/4/06 12:38 AM P Expand All Collapse All	Distribute or Publish a Module  1. Setup Content  2. Choose Users  3. Preview
🗉 Dashboard	
🗄 Demand Management	Select Content and Distribution Method
🗉 Project Management	'Module:
🗄 Time Management	This Module can be published to Mercury Users, and subsequently maintained only by Mercury Administrators. (Users will not be able to personalize the
🗄 Resource Management	content.) All or part of this Module can also be <b>distributed</b> to Mercury Users, for their individual personalization.
🗄 Program Management	All or part of this woulde can also be unsufficted to wereary disers, for their individual personalization.     (i) Publish entire Module (Administrator Controlled)
🗄 Portfolio Management	
Financial Management	O Distribute entire Module (User Controlled)
🗄 Deployment Management	O Distribute only these pages:
⊕ Reports	O Distribute only these portlets:
Administration	Place on the first available user-controlled page
Open Workbench Open Workbench on Desktc Edit My Profile View My Resource Informat Download Microsoft Project	Place on a new page, named Cancel  Back Hext
Demand Sets & Process	
🗄 Project Types & Templat	
Financials	
<ul> <li>Program Processes</li> <li>Portfolio Management</li> </ul>	
Time Management	
Regions	
Report Execution	
Portlet Definitions	
Modules     Configure Modules     Distribute a Module     Remove a Published Moc     Configure Default Module     Create a Module	
Product Information	

5. For the remaining instructions, see *Using the Module Distribution Wizard* on page 151.

# **Distributing Modules**

# **Overview of Rules for Distributed Modules**

Distributed modules comply with the following rules:

- Can have their Dashboard pages and portlets distributed individually
- Can have their Dashboard pages and portlets edited or removed by the owner of the Dashboard
- Are not tracked by the system
- Cannot have their Dashboard pages and portlets removed by the application administrator or advanced user
- Are not overwritten by an updated version of the distributed module

# **Using the Module Distribution Wizard**

Use the Module Distribution wizard to distribute modules.

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Distribute a Module.

The Setup Content step of the Distribute or Publish a Module page appears.

MERCURY	SIGN OUT
	Dashboard - Front Page > Distribute Module
Welcome, Admin User Oct 4, 2006 01:13:20 AM PDT Last Login: 10/4/06 12:38 AM P Expand All Collapse All	Distribute or Publish a Module 1. Setup Content  2. Choose Users  3. Preview
🗄 Dashboard	
Demand Management	Select Content and Distribution Method
	'Module:
🗄 Time Management	This Module can be published to Mercury Users, and subsequently maintained only by Mercury Administrators. (Users will not be able to personalize the
🗄 Resource Management	content.)
🗄 Program Management	All or part of this Module can also be distributed to Mercury Users, for their individual personalization.
Portfolio Management	Publish entire Module (Administrator Controlled)
Financial Management	O Distribute entire Module (User Controlled)
Deployment Management	O Distribute only these pages:
Reports	O Distribute only these portlets:
Administration Open Workbench Open Workbench Open Workbench Open Workbench Open Workbench Open Workbench Download Microsoft Project Bemand Sets & Process Project Types & Templat Financials Program Processes Portfolio Management Time Management Regions Portlet Definitions Modules Configure Modules Distribute a Module Create a Module Create a Module Product Information Product Product Information Product Product Information Product	• Place on the first available user-controlled page Place on a new page, named: Cancel Back Hext

- 3. In the **Module** field, select the name of the module to be published.
- 4. Select the distribution method.
  - To distribute the entire module:
    - □ Select Distribute entire Module (User controlled).
  - To distribute one or more pages from a module:
  - a. Select Distribute only these pages.
  - b. Select the pages in the accompanying field.
  - To distribute one or more portlets from a module:
  - a. Select Distribute only these Portlets.
  - b. Select the portlets in the accompanying field.

- c. Select either:
  - □ **Place on the first available user controlled page.** Distribute the selected portlets onto a user's existing home page.
  - Place on a new page, named. Distribute the selected portlets on a new Dashboard page. In the adjacent field, type the name of the new Dashboard page.
- 5. Click Next.

The Choose Users page appears.

MERCURY		SIGN OUT
	Dashboard - Front Page > Distribute Module	
Welcome, Admin User Oct 4, 2006 01:21:03 AM PDT Last Login: 10/4/06 12:38 AM P	Distribute a Module	
Expand All Collapse All	1. Setup Content   2. Choose Users   3. Preview	
🗄 Dashboard		
🗄 Demand Management	Select Recipients of Distribution	
🗄 Project Management	Module content will be sent to users belonging to any of the following selections	
🗄 Time Management	Users: Org Units:	
🗄 Resource Management	Groups:	
🗄 Program Management		
🗄 Portfolio Management	Notify Users of Distribution	
🗉 Financial Management	Send the following email at the time of distribution:	
🗄 Deployment Management	To: All impacted users selected above, who have valid email addresses in the system.	
⊞ Reports	system.	
Administration     Open Workbench     Open Workbench on Deskt     Edit My Profile     View My Resource Informal     Download Microsoft Project     Demand Sets & Process     Project Types & Templat     Financials     Program Processes     Portfolio Management     Time Management     Regions     Report Execution     Portlet Definitions     Modules     Dictingure Modules     Dictingure Published Module     Crentig are Module	'From:   Reply To:   BCC:   BCC:   Subject:   'Subject:   Message Format:   Plain Text IM	
Product Information	Cancel 4 Back Hext >	

6. In the **Select Recipients of Distribution** section, select the users and groups to receive the module.

At least one entry in one field is required. Note that users who are selected multiple times receive only one published module.

Field Name	Description	
Users	Select one or more users.	
Groups	Select one or more groups.	
Org Units	Select one or more organization units.	

7. (Optional) In the **Notify Users of Distribution** section, provide the notification details using the information from the following table.

Field Name (*Required)	Description		
Send the following email	By default, all recipients of the publication are sent the email.		
message at the time of publication	Select this option to enable notification and populate the <b>To</b> field with the users specified in step 6.		
Send as BCC	Select to hide the email addresses of the members of the distribution list.		
*From	Select the user whose email address to be used as the sender of the message.		
Reply To	Select the user whose email address should be used for replies.		
CC	Select one or more users who should also be notified.		
BCC	Select one or more users who should also be notified and hide the email addresses from the members of the distribution list.		
*Subject	Specify the title or subject of the email message. Type an alphanumeric string.		
	Select the format of the message. Choices include:		
Message Format	<ul> <li>Plain Text</li> </ul>		
	■ Html		
*Message Body	Specify the email message text to be sent.		
	Type an alphanumeric string.		

#### 8. Click Next.

The Preview step of the Distribute a Module page appears.

MERCURY					SIGN OUT
	Dashboard - Front Pag	<u>s</u> > Distribute Module			
Welcome, Admin User Oct 4, 2006 01:29:05 AM PDT Last Login: 10/4/06 12:38 AM P	Distribute a Mo	dule			
Expand All Collapse All	1. Setup Content 🕨 2	Choose Users 🕨 3. Preview	N		
🗄 Dashboard					
Demand Management	Preview Distribution				
Project Management	Distribution Content				
🗄 Time Management	Module: Sample Modul	е			
Descurses Management	Dashboard Page	Cont	ains Portlets		
Resource Management	New Page	<no p<="" td=""><td>oortlets&gt;</td><td></td><td></td></no>	oortlets>		
🗉 Program Management	Sample Page	Budg	et by Project Class		
🗄 Portfolio Management			gnment Queue		
🗄 Financial Management		Analy	/ze Resource Pools		
Deployment Management	Impacted Groups				
	IT Business Relationshi	p Specialist			
⊟ Administration					
Open Workbench	Impacted Users				
Open Workbench on Desktc	First Name	Last Name	Username	Email Address	Groups
Edit My Profile					
View My Resource Informal Download Microsoft Project	Barbara	Getty	bgetty	bgetty@acme.com	ITG User ; ITG Project Manage
Demand Sets & Process	Bridget	Holbrook	bholbrook	bholbrook@acme.com	ITG User ; ITG Project Manage
Project Types & Templat	Leslie Traci	Franklin Shimizu	Ifranklin	Ifranklin@acme.com	ITG User
⊕ Financials		Shimizu	tshimizu	tshinizu@acme.com	IIG User
Program Processes					
Portfolio Management					
Time Management					
Regions     ■					4 impacte
Report Execution	Email Notification	1			
Portlet Definitions					
Modules	No email notification will I	se sent upon Distribution			
Configure Modules					
Distribute a Module					
Remove a Published Moc				Cancel 4 Back	Next 🕨 Finis
Configure Default Module Create a Module					
Product Information					
<					>

- 9. In the **Distribution Content** section, review the module information and correct as necessary.
- 10. In the **Impacted Users** section, review the list of users and correct as necessary.
- 11. In the **Email Notification** section, review the email information and correct as necessary.

12. Click Finish.

The Module Publication Status page appears.

• A status bar is displayed in the event the publication of the module is taking longer than expected.

MERCURY	Close Window X
Module Publication Status	
Publication in progress	
42% Complete	
1	

 If the publication was successful, the Module Publication Status page is updated as follows.

MERCURY	Close Window 🗙
Module Publication Status	
Publication was Successful.	

- If the publication was not successful, the list of users not receiving the module is shown on the Module Publication Status page.
- 13. Close the Module Publication Status dialog box.
- 14. (Optional) From the updated Distribute a Module page, select the link of your choice.

# Using the Configure: < Modules Name> Page

To distribute an existing module:

- 1. Log on to Mercury IT Governance Center.
- 2. From the menu bar, select Administration > Modules > Configure Modules.

The Configure Modules page appears, as shown in step 2 on page 122.

3. Search for and select a module.

For complete information on how to search for and select modules, see *Searching for Modules* on page 122.

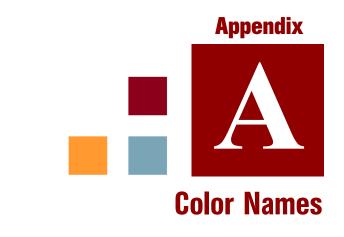
The Configure: *<Module Name>* page appears, as shown in step 3 on page 132.

#### 4. Click Save and Distribute.

The Distribute or Publish a Module page appears.

MERCURY	SIGN OUT		
Dashboard - Front Page > Distribute Module			
Welcome, Admin User Oct. 4, 2006 01:13:20 AM PDT Last Login: VAIV69 12:38 AM P			
Expand All Collapse All 1. Setup Content > 2. Choose Users > 3. Preview			
Dashboard			
Demand Management     Select Content and Distribution Method			
Project Management     Module:			
Time Management This Module can be published to Mercury Users, and subsequently maintained only by Mercury Administrators. (Users w	ill not be able to personalize the		
Resource Management     All or part of this Module can also be distributed to Mercury Users, for their individual personalization.	content.)		
🖻 Program Management			
Publish entire Module (Administrator Controlled)			
E Financial Management			
Deployment Management     Distribute only these pages:			
Reports     Distribute only these portlets:			
Administration     OPlace on the first available user-controlled page			
Open Workbench OPEn Workbench OPEnce on a new page, named			
Download Microsoft Project Cancel 4 Back	Hext 🕨		
Demand Sets & Process			
<ul> <li>☑ Project Types &amp; Templat</li> <li>☑ Financials</li> </ul>			
➡ Program Processes			
Portfolio Management			
Time Management			
🗄 Regions			
Report Execution			
Portlet Definitions			
Modules     Configure Modules			
Distribute a Module			
Remove a Published Moc			
Configure Default Module Create a Module			
Product Information			

5. For the remaining instructions, see *Using the Module Distribution Wizard* on page 151.



This appendix provides the table of color names that are supported by most browsers. These are the color names referenced in *Selecting Portlet Colors* on page 113.

It is important to note that only 16 color names are supported in the W3C HTML 4.0 standard (aqua, black, blue, fuchsia, gray, green, lime, maroon, navy, olive, purple, red, silver, teal, white, and yellow). If you have concerns about browser compatibility, or are planning to export the portlet, you should use the hexadecimal values rather than the color names.

To view the colors themselves, point your browser to http://www.w3.org/TR/css3-color/#html4 and locate the section documenting "SVG color keywords."

Color Name	Hex Value
AliceBlue	#F0F8FF
AntiqueWhite	#FAEBD7
Aqua	#00FFFF
Aquamarine	#7FFFD4
Azure	#F0FFFF
Beige	#F5F5DC
Bisque	#FFE4C4

Table A-1. Color names (page 1 of 6)

Color Name	Hex Value
Black	#000000
BlanchedAlmond	#FFEBCD
Blue	#0000FF
BlueViolet	#8A2BE2
Brown	#A52A2A
BurlyWood	#DEB887
CadetBlue	#5F9EA0
Chartreuse	#7FFF00
Chocolate	#D2691E
Coral	#FF7F50
CornflowerBlue	#6495ED
Cornsilk	#FFF8DC
Crimson	#DC143C
Cyan	#00FFFF
DarkBlue	#00008B
DarkCyan	#008B8B
DarkGoldenrod	#B8860B
DarkGray	#A9A9A9
DarkGreen	#006400
DarkKhaki	#BDB76B
DarkMagenta	#8B008B
DarkOliveGreen	#556B2F
DarkOrange	#FF8C00
DarkOrchid	#9932CC
DarkRed	#8B0000
DarkSalmon	#E9967A
DarkSeaGreen	#8FBC8F
DarkSlateBlue	#483D8B

Table A-1. Color names (page 2 of 6)

Color Name	Hex Value
DarkSlateGray	#2F4F4F
DarkTurquoise	#00CED1
DarkViolet	#9400D3
DeepPink	#FF1493
DeepSkyBlue	#00BFFF
DimGray	#696969
DodgerBlue	#1E90FF
Feldspar	#D19275
FireBrick	#B22222
FloralWhite	#FFFAF0
ForestGreen	#228B22
Fuchsia	#FF00FF
Gainsboro	#DCDCDC
GhostWhite	#F8F8FF
Gold	#FFD700
GoldenRod	#DAA520
Gray	#808080
Green	#008000
GreenYellow	#ADFF2F
HoneyDew	#F0FFF0
HotPink	#FF69B4
IndianRed	#CD5C5C
Indigo	#4B0082
lvory	#FFFF0
Khaki	#F0E68C
Lavender	#E6E6FA
LavenderBlush	#FFF0F5
LawnGreen	#7CFC00

Table A-1. Color names (page 3 of 6)

Color Name	Hex Value
LemonChiffon	#FFFACD
LightBlue	#ADD8E6
LightCoral	#F08080
LightCyan	#E0FFFF
LightGoldenrodYellow	#FAFAD2
LightGrey	#D3D3D3
LightGreen	#90EE90
LightPink	#FFB6C1
LightSalmon	#FFA07A
LightSeaGreen	#20B2AA
LightSkyBlue	#87CEFA
LightSlateBlue	#8470FF
LightSlateGray	#778899
LightSteelBlue	#B0C4DE
LightYellow	#FFFFE0
Lime	#00FF00
LimeGreen	#32CD32
Linen	#FAF0E6
Magenta	#FF00FF
Maroon	#800000
MediumAquamarine	#66CDAA
MediumBlue	#0000CD
MediumOrchid	#BA55D3
MediumPurple	#9370D8
MediumSeaGreen	#3CB371
MediumSlateBlue	#7B68EE
MediumSpringGreen	#00FA9A
MediumTurquoise	#48D1CC

Table A-1. Color names (page 4 of 6)

Color Name	Hex Value
MediumVioletRed	#C71585
MidnightBlue	#191970
MintCream	#F5FFFA
MistyRose	#FFE4E1
Moccasin	#FFE4B5
NavajoWhite	#FFDEAD
Navy	#000080
OldLace	#FDF5E6
Olive	#808000
OliveDrab	#6B8E23
Orange	#FFA500
OrangeRed	#FF4500
Orchid	#DA70D6
PaleGoldenrod	#EEE8AA
PaleGreen	#98FB98
PaleTurquoise	#AFEEEE
PaleVioletRed	#D87093
PapayaWhip	#FFEFD5
PeachPuff	#FFDAB9
Peru	#CD853F
Pink	#FFC0CB
Plum	#DDA0DD
PowderBlue	#B0E0E6
Purple	#800080
Red	#FF0000
RosyBrown	#BC8F8F
RoyalBlue	#4169E1
SaddleBrown	#8B4513

Table A-1. Color names (page 5 of 6)

Color Name	Hex Value
Salmon	#FA8072
SandyBrown	#F4A460
SeaGreen	#2E8B57
SeaShell	#FFF5EE
Sienna	#A0522D
Silver	#C0C0C0
SkyBlue	#87CEEB
SlateBlue	#6A5ACD
SlateGray	#708090
Snow	#FFFAFA
SpringGreen	#00FF7F
SteelBlue	#4682B4
Tan	#D2B48C
Teal	#008080
Thistle	#D8BFD8
Tomato	#FF6347
Turquoise	#40E0D0
Violet	#EE82EE
VioletRed	#D02090
Wheat	#F5DEB3
White	#FFFFF
WhiteSmoke	#F5F5F5
Yellow	#FFFF00
YellowGreen	#9ACD32

Table A-1. Color names (page 6 of 6)

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